



## Annual Conference Agenda April 14-17, 2021



# DREAMS<sup>®</sup> *Los Cabos* SUITES GOLF RESORT & SPA

Wednesday, April 14, 2021 (TDB)	
5:00 pm to 8:00 pm	Welcome Reception and Dinner
Thursday, April 15, 2021 (Delphin Rooms)	
7:30 am - 8:30 am	Breakfast
8:30 am - 9:00 am	Welcome and DIA Business <b>Patrick Jacobwith, Opening Remarks</b>
9:00 am - 10:30 am	<b>Josh Peterson, Bering McKinley</b> – <i>Gross Profit is King</i>
10:30 am - 10:45 am	Break
10:45 am - 11:45 am	<i>Gross Profit is King... Continuation</i>
12:00 pm – 1:00 pm	Lunch
1:15 pm – 1:45 pm	<b>Lee Rozeboom, GreatAmerica Financial</b>
1:45 pm – 2:45 pm	<b>Member Topic:</b> Post Covid Opportunity Planning Discussion, led by Wesley Robinson (IAG)
2:45 pm – 3:00 pm	Break
3:00 pm – 4:00 pm	<b>Member Topic:</b> Iceberg Theory – Much of What We Do is Below the Waterline, led by Patrick Jacobwith (Sunset)
4:00 pm	Daily Wrap Up
6:00 pm	<b>Dinner TBD</b>

<b>Friday, April 16, 2021 (Delphin Rooms)</b>	
8:00 am - 9:00 am	Breakfast
9:00 am - 9:15 am	Opening Remarks, <b>Patrick Jacobwith</b>
9:15 am - 10:45 am	<b>Josh Peterson, Bering McKinley</b> – <i>Unlocking the Profit Potential of Service Managers and Dispatchers</i>
10:45 am - 11:00 am	Break
11:00 am – 12:00 pm	<i>Unlocking the Profit Potential of Service Managers and Dispatchers... .Continued</i>
12:00 pm – 1:00 pm	Lunch
1:15 pm – 1:45 pm	<b>Eric Torres, Datto</b>
1:45 pm – 2:45 pm	<b>Member Discussion:</b> Cybersecurity Services & Sales - What Works? What's Required? What Should Be?
2:45 pm – 3:00 pm	Break
3:00 pm – 4:00 pm	<b>Member Topic:</b> Are you an Ace or a Nickel & Dime Discussion, led by Tyler Carleson (CTS)
4:00 pm	Daily Wrap Up
<b>Saturday, April 17, 2021 (Members Only)</b>	
8:30 am - 9:30 am	Breakfast
9:30 am - 10:00 am	DIA Housekeeping
10:00 am - 12:00 pm	Round Table: <b>Moderator, President - Integrator Executive Roundtable,</b> Open Forum / Various Issues
12:00 pm	DIA Business / Conference Closing: <b>Patrick Jacobwith</b>

**Thank you to the  
2019 - 2021 Board Members**

**Patrick Jacobwith - President  
Christi Thissen  
Steve McNamara  
Randy Mayall  
Greg LePage**

# Guest Speaker



## Josh Peterson



**Josh Peterson** is the founder and CEO of Bering McKinley, a management consulting firm serving IT Solution Providers from around the world. For over 14 years, the mission has been to provide blue-chip strategic and operational consulting to companies looking for exceptional growth, profit, and exit strategies. As the longest-tenured consultant in the IT space, Josh and his team continue to deliver and exceed client expectations. Bering McKinley is also the longest-running independent ConnectWise consulting firm in the industry, with over 20,000 hours spent working with clients and end-users.

Josh's presentations at IT Nation, Autotask Community Live, Tech Select, Channel Pro, and other major industry events are filled with real-life scenarios, humor, and a harsh dose of accountability.

Josh rejects cookie-cutter solutions, "one to many consulting," and anything that smells like a so-called scalable approach to consulting. Bering McKinley solutions are designed, tested, and implemented to meet each client's unique circumstances. Clients benefit from the success and struggles of those who came before them.

With an MBA and an undergraduate degree in education, Josh has studied how organizations work, how to train owners and staff on new and difficult concepts, and how to build teams that succeed for everyone involved.

Along with Josh's passion for innovation and business, he also enjoys flying, World Series of Poker events, and spending as much time possible traveling with his wife and two sons. Recently Josh completed (run would be an exaggeration) the NYC Marathon and the NYC ½ Marathon with several Bering McKinley Peer Team members.

Contact Josh:

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***Bering McKinley***

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# Partners

## **PLATINUM**



### **Lee Rozeboom**

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GreatAmerica Financial Services partners with MSPs, VARs, and resellers in the channel to help them successfully grow their businesses and create long term relationships with their clients. By using a strong financing strategy with GreatAmerica, your customers will upgrade their technology more frequently, improve their service experience, increase your cash flow, and ultimately reinforce yourself as the trusted advisor to your clients. Partners across the country are having amazing success by matching a hardware and project monthly payment with their Managed Services monthly payment.

# datto

### **Eric Torres**

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As the world's leading provider of IT solutions delivered by Managed Service Providers (MSPs), Datto believes there is no limit to what small and medium businesses can achieve with the right technology. Datto offers business continuity and disaster recovery, networking, business management, and file backup and sync solutions, and has created a one-of-a-kind ecosystem of partners that provide Datto solutions to half a million businesses across more than 130 countries. Since its founding in 2007, Datto has earned hundreds of awards for its rapid growth, product excellence, superior technical support, and for fostering an outstanding workplace. With global headquarters in Norwalk, Connecticut, Datto has international offices in the United Kingdom, Netherlands, Denmark, Germany, Canada, Australia, China, and Singapore. Learn more at [datto.com](http://datto.com).