Annual Conference Agenda
April 6-9, 2022

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RESORT & SPA

Wednesday, April 6, 2022 (Azurea Patio)	
5:00 pm to 8:00 pm	Registration & Welcome Dinner Reception with Partners
Thursday, April 7, 2022	
7:30 am - 8:30 am	Breakfast with Partners (Pristina)
8:30 am - 9:00 am	Welcome and DIA Business (Solaria) **Patrick Jacobwith, Opening Remarks**
9:00 am - 10:30 am	**Phyllis Lee, Center Internet Security –** *Getting Started with the CIS Controls*
10:35 am – 10:45 am	Gold Presentation: **Mark Winter, Rapid Fire Tools (Kaseya)**
10:45 am – 11:00 am	Break / Partner Networking
11:05 am – 11:25 am	Platinum Presentation: **Matt Prados, Review Wave**
11:30 am - 11:50 am	Platinum Presentation: **Lee Rozeboom, GreatAmerica**
11:50 am - 12:00 pm	Board of Directors Introduction
12:00 pm - 1:00 pm	Lunch with Partners (Verandina)
1:00 pm – 1:15 pm	Partner Networking Opportunity / Set up for Roundtables
1:15 pm – 1:20 pm	Mini Roundtable Introduction and Objectives (Pristina)
1:20 pm – 2:55 pm	Mini Roundtables (5 sessions/tables of 15 min each) – 3 Partners; 2 Speaker
3:10 pm – 4:10 pm	**Dan Stalp, Sandler Training -** *Sales Assessments: Good For You - Or Not?* (Solaria)
4:15 pm	Daily Wrap Up
5:00 pm to 7:00 pm	**Connections & Cocktails:** Open bar & heavy hors d'oeuvres (Verandina)

Friday, April 8, 2022	
8:00 am - 9:00 am	Breakfast with Partners (collect Saturday roundtable surveys) (Pristina)
9:00 am - 9:15 am	Opening Remarks, **Patrick Jacobwith** (Solaria)
9:15 am - 10:00 am	**Monica Mitchell, Corporate Impact Partners –** *Doing Well By Doing Good: How To Connect The Bridge Between Philanthropy & Business!*
10:05 am - 10:15 am	Gold Presentation: **Alexander Malone, RecallMax**
10:20 am - 10:30 am	Gold Presentation: **Chris Gross, Breach Secure Now**
10:30 am – 10:45 am	Break / Partner Networking
10:50 am – 11:10 am	Platinum Presentation: **Desraie Thomas, Datto**
11:15 am – 11:25 am	Gold Presentation: **Scott Provencher, ConnectWise**
11:30 am – 11:40 am	Gold Presentation: **Bill Morgan**, **Liongard**
11:40 am – 12:00 pm	Board of Directors Election
12:00 pm – 1:00 pm	Lunch with Partners (Verandina)
1:00 pm – 1:10 pm	Partner Networking Opportunity / Set up for Roundtables
1:10 pm – 1:15 pm	Mini Roundtable Introduction and Objectives (Pristina)
1:15 pm – 3:10 pm	Mini Roundtables (6 sessions/tables of 15 min each) – 5 Partners / 1 speaker
3:15 am – 4:15 pm	**Standing on the Shoulders of Giants, Member Presentation**: Clay Archer of DPC & Steve McNamara of DTC, *Lessons Learned going to All-You-Can-Eat*
4:15 pm	Daily Wrap Up
4:15 pm – 5:15 pm	Partner Recognition Cocktail Reception Dinner on your own
Saturday, April 9, 2022 (Members Only - Verandina)	
8:30 am - 9:30 am	Breakfast
9:00 am – 9:15 am	DIA Housekeeping
9:15 am – 12:00 pm	**Committee Working Session**: Deep Dive on Technical, Security and Business Standards
12:00 pm	Conference Closing: **Patrick Jacobwith**

Thank you to the
2021 Board Members

Patrick Jacobwith – President
Jeff Weiss, Treasurer
Christi Thissen
Steve McNamara
Greg LePage

Guest Speaker

CIS. **Center for Internet Security®**

Creating Confidence in the Connected World.

Phyllis Lee
Senior Director for Controls

Phyllis Lee is the Senior Director of Controls at the Center for Internet Security (CIS). She has more than 25 years of experience in information assurance and has performed vulnerability assessments, virtualization research and worked in security automation.

Prior to joining CIS, Ms. Lee worked at the National Security Agency (NSA) focusing on the intersection between malware and virtualization, which included collaboration with MIT Lincoln Labs. She also participated in a variety of security automation standardization efforts and led the security automation strategy for the NSA Information Assurance Directorate (IAD).

Ms. Lee graduated from Johns Hopkins University with a Master of Science in Computer Science.

Contact Phyllis:

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Guest Speaker

Dan Stalp

Dan Stalp has 27 years of experience leading, training, and coaching high performing individuals.

He has risked everything and started over twice career wise in 1993 as a benefits broker and again in 2005 with his Sandler Training office.

Dan has co-authored three books "The Reunion" (2011), "Another Reunion" (2013), and "The Last Reunion" (2020) about career significance and how pursing what you were "meant to do" - along with being grateful - plays an instrumental role in being the best you can be.

Dan is blessed to be a mentor with the Helzberg Entrepreneurial Mentoring Program in Kansas City. He is asked to be interviewed on numerous panels, podcasts, and radio programs concerning sales, sales management and leadership.

Contact Dan:

(913) 451-1760 ext. 2001
Sandler Training
dstalp@sandler.com
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Guest Speaker

CORPORATE IMPACT PARTNERS

Monica Mitchell
CEO

Monica Mitchell is a passionate community leader, experienced in the strategic design and execution of community development, engagement, and social impact projects that empower others to be leaders by "serving others and doing good."

In her consulting practice, Monica and the team at Corporate Impact Partners provides technical assistance to small to midsize companies, including social impact capacity building, initiative planning and management, nonprofit collaboration, coaching, network building and facilitation, ongoing program support and review, and opportunities for positive brand exposure.

Monica has spent the past 20 years leading Social Impact, Corporate Volunteerism, Community Development, and Philanthropy for a Fortune 50 company, earning a strong professional and personal brand providing innovation and bringing complex ideas to market.

Monica is the founder of the Lillie May Carroll Jackson School, an all-girls public charter school that serves over 300 5th-8th grade girls in Northeast Baltimore City. In addition, she was a founding member of the United Way of Central Maryland's Emerging Leaders United Program to promote the next generation of leaders' professional development and community involvement.

Contact Monica:

410-299-9782
Corporate Impact Partners
monica@corporateimpactpartners.com

Partners

Lee Rozeboom

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.

Desraie Thomas & George Caban

Datto is the leading global provider of security and cloud-based solutions purpose-built for delivery by Managed Service Providers (MSPs) who in turn provide Datto solutions to over one million businesses across the globe. Since its founding in 2007, Datto continues to win awards each year for its rapid growth, product excellence, superior technical support, and for fostering an outstanding workplace. With headquarters in Norwalk, Connecticut, Datto has global offices in Australia, Canada, China, Denmark, Germany, Israel, the Netherlands, Singapore, and the United Kingdom. Learn more at www.datto.com.

Matt Prados & Austin Daughtery

Review Wave is best in class reputation management software for dentists to get reviews.
It is best in class customer service and support, so your clients get results and you don't get headaches. Review Wave can also handle your clients 2-way texting, appointment reminder needs, as well as Online Scheduling, and even listing SEO. This makes Review Wave the most complete integrated marketing automation platform for dentists all under one roof, and at a great savings to your client.

CONNECTWISE

Scott Provencher & Courtney Campbell

ConnectWise is the world's leading software company dedicated to the success of IT solution providers through unmatched software, services, community, and a marketplace of integrations. ConnectWise's innovative, integrated, and security-centric platform – Asio™ – provides flexibility that fuels profitable, long-term growth for partners. ConnectWise enables ITSPs to drive business efficiency with automation, IT documentation, and data management capabilities – and to increase revenue using remote monitoring, cybersecurity, and backup and disaster recovery technologies.

RapidFireTools
A Kaseya COMPANY

Mark Winter

RapidFire Tools, Inc creates innovative business-building technology tools for Managed Service Providers (MSPs). More than 8,000 technology service professionals worldwide use our products. Network Detective Pro® is the #1 non-intrusive IT assessment and reporting tool. VulScan™ is a vulnerability scanning purpose-built to provide automated alerts and drill-down dashboards and is priced to be affordable. Cyber Hawk™ detects insider cybersecurity threats and generates daily alerts of suspicious network changes and anomalous end-user behaviors. Compliance Manager™ is a unique compliance process automation tool with built-in modules to support the delivery of Compliance-as-a-Service solutions.

RECALLMAX™

Alex Malone

RecallMax is a software solution that focuses on keeping your schedules full. We go beyond just automated patient communication and offer a multi-pronged approach to recall that picks up where automation stops. Recall shouldn't be a four letter word, and that's why our software is tailored to helping with the core issues that impact the success of recall management in the practice.

Chris Gross & Lisa Lodge

Breach Secure Now is the channel leader in Cybersecurity Awareness & HIPAA Compliance training. Founded in 2014 to help Managed Service Providers market, sell, and manage the human side of security, Breach Secure Now offers white-labeled training solutions that fit seamlessly into any MSP's stack.

Bill Morgan & Ben Bunting

Liongard's platform delivers unified visibility to MSPs, continuously collecting data across cloud and network systems, apps, services and endpoints. Through automated discovery, documentation and auditing, Liongard empowers MSPs to standardize their processes, secure their customers' systems and scale operations. By centralizing deep system data, Liongard enables faster resolutions, eliminates unnecessary escalations and facilitates the creation of alerts and reports that help streamline managing systems. Liongard's continuous data collection and historical timelines even allow MSPs to go back in time to see what changed. Are you ready to start operating at scale? Join us at liongard.com.

SILVER

Laura Miller

Aspida Mail offers a comprehensive solution for HIPAA Compliant Encrypted Email, including email archiving, retention and backup for six years along with robust Spam and Malware Protection. We are a true email solution – offering both outbound & inbound encryption. We manage MX records of existing domains or allow users to purchase a single address on our domain (ex: drjohnsmith@aspidamail.com). With Aspida Mail, there is no software to install, maintain or update. All plans offer simple, month-to-month pricing with no contracts, no set-up fees and no hidden costs. HIPAA Compliant Email - Simplified.

Tim Poor & Tim Devitt

Equus Compute Solutions customizes white box servers and storage solutions to enable flexible software-defined infrastructures. Delivering low-cost solutions for the enterprise, software appliance vendors, resellers, and cloud providers, Equus is one of the leading white-box systems and solutions integrators. Over the last 28 years, we have delivered more than 3.5 million custom-configured servers, software appliances, desktops, and notebooks throughout the world. Our advanced systems support software-defined storage, networking, and virtualization that enable a generation of hyper-converged scale-out applications and solutions. From components to complete servers, to fully customized fixed-configurations, white box is our DNA. Find out how to enable your software-defined world with us at www.equuscs.com.