

Cloud Coach Live Boston

April 27th 2022

All Tracks

8:30 - 9:30 am: Registration

9:30 - 10:15 am: Keynote

Admin Track

10:30 - 11:15 am: Scalable Automation for Project Efficiency

Master best practices and tips and tricks for building automation that scales with your Salesforce instance, speeds up time-to-value, and superpowers your project processes!

11:30 - 12:15 pm: Reporting and Visibility

Learn the pros and cons of Salesforce reporting for Cloud Coach, how to best extend organizational communication across multiple levels of stakeholders, and how to leverage additional tools like Tableau CRM to maximize project visibility.

12:30 - 1:15 pm: Lunch

1:30 - 2:15 pm: Cloud Coach Admin 101

Ever wonder what it takes to admin your Cloud Coach instance? Join the team as they discuss best practices for customizing Cloud Coach through field sets, project specific UIs, and the most frequently requested configurations.

2:30 - 3:15 pm: Integration Solutions

Discover how to maximize middleware and Salesforce solutions to link your Cloud Coach projects with the most commonly requested external tools, such as SAP, Netsuite, Jira and much more!

Business Track

10:30 - 11:15 am: Planning and Forecasting for Project Initiation, Resource Capacity, and Budgeting

The first in our three-part project series: the team explores methods for creating and tracking project requests, forecasting labor needs and shifting resource requirements, and best-practices for financial budgeting.

11:30 - 12:15 pm: Executing Exceptional Project and Customer Delivery

Continue through our three-part project series, learning how to optimize project delivery and customer collaboration to drive speed-to-value, high-level client satisfaction through meetings and external deliverables, and improved engagement across all your business initiatives.

12:30 - 1:15 pm: Lunch

1:30 - 2:15 pm: Reconciling Estimates vs Actuals Across Projects, Resources, and Financials

The finale of our three-part project series – learn how to report and action on your estimates vs actuals, including industry recommendations for time entry, financial budgeting, and project scope!

2:30 - 3:15 pm: Maximizing PSA Value for Your Business

Learn from our guest PSA experts and leaders in the field as we present a live panel discussion on Professional Services Automation focused on how to accelerate your resource utilization, tips and tricks for user adoption, and best-practice reporting.

All Tracks

3:30 - 4:15 pm: Roadmap

Get a sneak peek of the newest features coming to your Cloud Coach instance in 2022 and early 2023, and share feedback and feature requests through a live Q&A with the product team.

4:30 pm: Cocktail Reception