CLOUD COACH

Cloud Coach Live Boston

March 28, 2023

All Tracks

8:30 - 9:30 am: **Registration, Coffee and Breakfast Buffet**

9:30 - 10:15 am: **Keynote**

11:15 - 11:30 am: **Morning Break and Snacks**

12:15 - 1:15 pm: **Lunch**

3:15 - 3:30 pm: **Afternoon Break and Snacks**

Business Track

These sessions are ideal for business users involved in project management, resource planning, operations, and customer service. Attendees responsible for managing resources, tracking metrics, and improving customer satisfaction would benefit from these sessions, which offer new tools and best practices for optimizing business processes and performance.

10:30 - 11:15 am: **Resource Planning and Forecasting for a Best-Run Organization**
Discover how a "best-run" organization sets up their resource forecasting, reports on actuals, reconciles differences, and works cross-departmentally to avoid potential collisions

11:30 - 12:15 pm: **Is Utilization the Best Way to Measure A Results-Oriented Business?**
Utilization vs Results - which is the ultimate indicator of project and business success? Learn how to leverage key metrics within Cloud Coach to move your services and customer-facing departments into delivery excellence

1:30 - 2:15 pm: Moving from a Project-Driven to a Process-Driven Approach
Learn how to move your business from stand-alone projects to a process-driven, scalable, and standardized system of reporting and delivery. Maximize new template performance visualizations and discover key tie-ins between business units like sales, operations, and finance

2:30 - 3:15 pm: Panel: The Challenges of Being a Customer-First Organization
Join our panel of guest experts and leaders in client-focused project delivery as we discuss how to overcome challenges in communication, collaboration, visualization, and interaction throughout the customer journey

Admin Track

Geared specifically for Salesforce and Cloud Coach Admins, these sessions cover ways to improve user adoption, onboarding, and administration. Attendees will learn about adjusting visualizations, creating custom permissions groups, best practices for admin tasks, and platform automation.

10:30 - 11:15 am: Adjusting Cloud Coach Visualizations to Maximize User Adoption
Master the different ways to adjust Cloud Coach project pages, cross-project views, and dashboards and widgets to ensure the ultimate user experience

11:30 - 12:15 pm: Onboarding New Users and Teams to Cloud Coach
Learn best practices for creating the perfect user onboarding experience, and discover how to maximize custom permissions groups and identify new training opportunities

1:30 - 2:15 pm: Tips, Tricks, and Admin Best Practices
What's the best way to set up a Time Entry Approval process? How can I utilize the hidden features in Custom Settings? What's the best change management approach for a new release? Join the team as they discuss these and many other best-practice topics

2:30 - 3:15 pm: **The Pros and Cons of Platform Automation**

Discover how to create the most-common Cloud Coach automations, like project, phase, and meeting creation, and hear from experts on best approaches for setting up and scaling your project processes

Business and Admin Track

3:30 - 4:15 pm: **Roadmap**
Get a sneak peek of the newest features coming to your Cloud Coach instance in 2023 and early 2024, and share feedback and feature requests through a live Q&A with the product team.

Power User / 'Train the Trainer' Certification Track

10:30 - 4:15 pm: **Certification Sessions**
Discover everything that Cloud Coach has to offer through our Cloud Coach Power User Certification. This live certification track provides hands-on training, giving users the skills and know-how to get the most out of their Cloud Coach instance.

Key areas covered :
- *Best practices and how-to's on managing your project plans (includes all project methodologies)*
- *How to effectively manage, group, and visualize multiple projects*
- *Tips on keeping customers and external stakeholders engaged and active during project delivery*
- *Resourcing best practices*
- *Project financials*
- *Understanding the customization options within Cloud Coach*

After the training, users will have a week to take the final exam, and upon passing will receive an official Cloud Coach Power User Certification! ***(Users must attend all certification sessions for exam eligibility)***