e-automate Elevate 2026 Schedule

Thursday, March 19

Breakfast on Your Own

7:30 to 8 a.m.
Event Registration

8 to 8:30 a.m.
Welcome & ECI Sponsor Message *(GH Salons 3 & 4)*

8:40 to 9:40 a.m.
- **Accounting Best Practices for e-automate Users**
  "Month-End Closing Best Practices," Jason Plott, XYZ Consulting *(Cape Cod B)*
- **Mastering Contract Setup & Management**
  "Process Before Contract Setup," Dondra Bott, DB Consulting and Business Management *(Cape Cod C)*
- **Service & Inventory**
  "Service Territory Strategies to Maximize First-Call Effectiveness," Jack Duncan, Jack Duncan Consulting *(Cape Cod A)*
- **Power BI**
  "Power BI Report & Dashboards for Sales, Leads, QBRs, Customer Retention & Deals," Mike Kirkpatrick and Gary Lavin, CEO Juice *(GH Salons 3 & 4)*
- **Real-World Challenges & Actionable Solutions**
  "Inventory Management That Works," Duane Walker, DL Walker Management *(Saybrook)*

9:45 to 10:45 a.m.
- **Accounting Best Practices for e-automate Users**
  "E-views & E-agent," Jason Plott, XYZ Consulting *(Cape Cod B)*
- **Mastering Contract Setup & Management**
  "Contract Setup," Dondra Bott, DB Consulting and Business Management *(Cape Cod C)*
- **Service & Inventory**
  "Service Performance Benchmarks — What Can the Benchmarks Tell Us?" Jack Duncan, Jack Duncan Consulting, and Mike Kirkpatrick and Gary Lavin, CEO Juice *(Cape Cod A)*
- **Real-World Challenges & Actionable Solutions**
  "Duplicate Meters & Meter Management," Duane Walker, DL Walker Management *(Saybrook)*

10:45 to 11 a.m.
Refreshment Break

11 a.m. to Noon
- **Accounting Best Practices for e-automate Users**
  "e-automate Database Audits," Jason Plott, XYZ Consulting *(Cape Cod B)*
- **Mastering Contract Setup & Management**
  "Process Before Contract Setup," Dondra Bott, DB Consulting and Business Management *(Cape Cod C)*

11 a.m. to Noon Cont.
- **Service & Inventory**
  "Financial Benchmarks for Service & Aftermarket," Jack Duncan, Jack Duncan Consulting *(Cape Cod A)*
- **Power BI**
  "Power BI Report & Dashboards for Owners & Financials," Mike Kirkpatrick & Gary Lavin, CEO Juice *(GH Salons 3 & 4)*
- **Real-World Challenges & Actionable Solutions**
  "Inventory Management That Works," Duane Walker, DL Walker Management *(Saybrook)*

Noon to 1:15 p.m.
Lunch *(GH Salon 2)*

1:20 to 2:20 p.m.
- **Accounting Best Practices for e-automate Users**
  "Month-End Closing Best Practices," Jason Plott, XYZ Consulting *(Cape Cod B)*
- **Mastering Contract Setup & Management**
  "Contract Setup," Dondra Bott, DB Consulting and Business Management *(Cape Cod C)*
- **Power BI**
  "Power BI Report & Dashboards for Service, Tech Stats, Profit & MIF," Mike Kirkpatrick and Gary Lavin, CEO Juice, and Jack Duncan, Jack Duncan Consulting *(GH Salons 3 & 4)*
- **Real-World Challenges & Actionable Solutions**
  "Duplicate Meters & Meter Management," Duane Walker, DL Walker Management *(Saybrook)*

2:20 to 2:35 p.m.
Refreshment Break

2:40 to 3:40 p.m.
- **Accounting Best Practices for e-automate Users**
  "e-automate Database Audits," Jason Plott, XYZ Consulting *(Cape Cod B)*
- **Mastering Contract Setup & Management**
  "E-view Reports," Dondra Bott, DB Consulting and Business Management *(Cape Cod C)*
- **Service & Inventory**
  "Inventory & Car Stocks" Jack Duncan, Jack Duncan Consulting *(Cape Cod A)*
- **Power BI**
  "Power BI Report & Dashboards for AR, Operations & Inventory," Mike Kirkpatrick and Gary Lavin, CEO Juice *(GH Salons 3 & 4)*
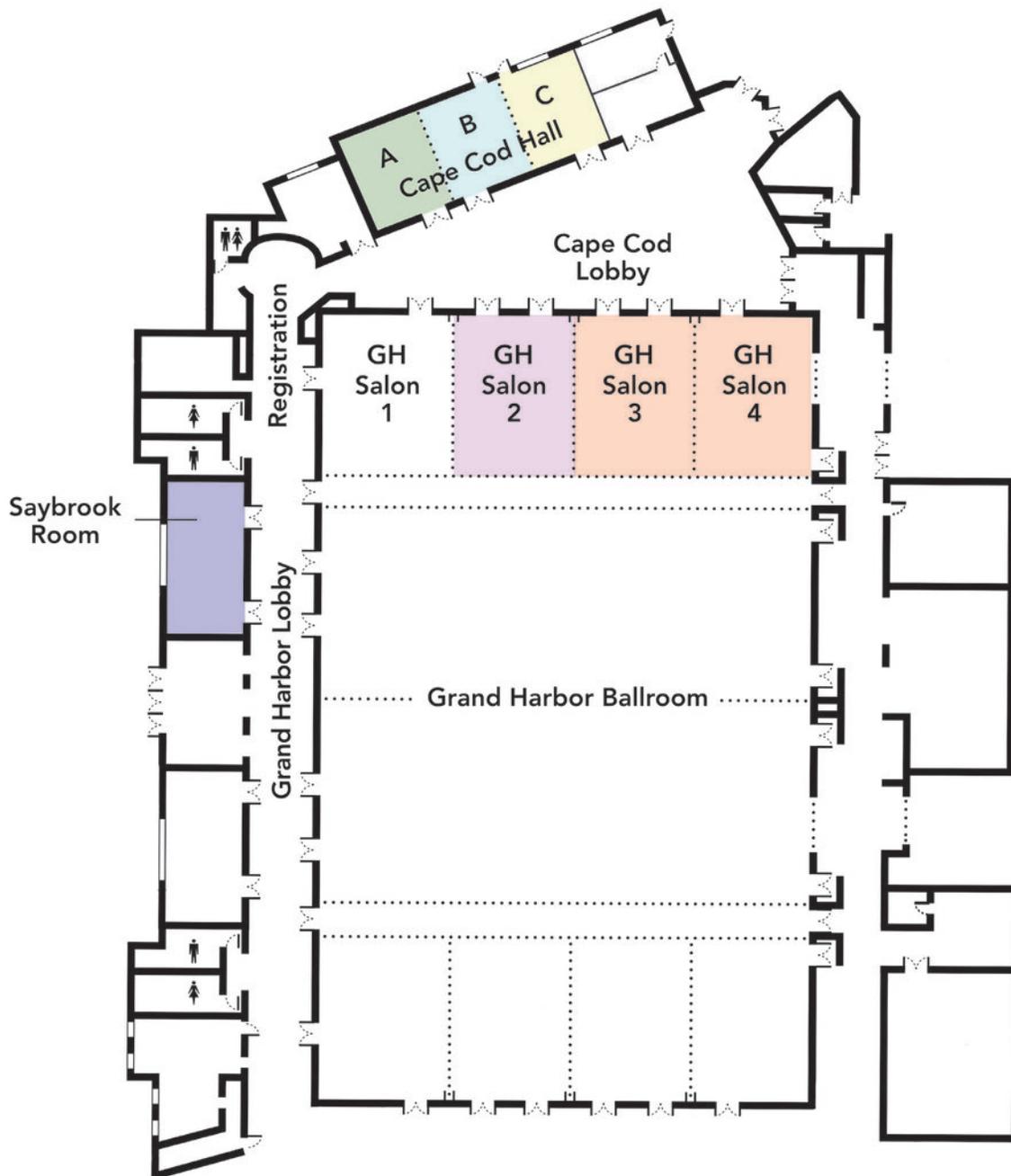- **Real-World Challenges & Actionable Solutions**
  "Interterritorial Service (ITT) Agreements — Simplified & Strengthened," Duane Walker, DL Walker Management *(Saybrook)*

3:45 to 5 p.m.
- **All Tracks**
  "Ask the Experts" *(GH Salons 3 & 4)*

e-automate Elevate Map

Saybrook Room: "Real-World Challenges & Actionable Solutions" track

Cape Cod A: "Service & Inventory" track

Cape Cod B: "Accounting Best Practices for e-automate Users" track

Cape Cod C: "Mastering Contract Setup & Management" track

GH Salons 3 & 4: Welcome, "Power BI" track & Ask the Experts Panel

GH Salon 2: Lunch