

Evaluate. Enhance. Extend. Educate.

2023 Conference Agenda

Evaluate. Enhance. Extend. Educate.

CONNECT

isolved · 2023 Conference

Welcome to Connect.

I'm thrilled you're here with us in Palm Desert! We have three days of networking, learning and entertainment planned for you – including opportunities to earn continuing education credits, get your top questions answered by isolved experts and mingle with your fellow People Heroes at exciting events like our Wrap party (featuring the Gin Blossoms!). To help you get the most out of this year's conference, we've split our sessions into four different learning paths: **Evaluate. Enhance. Extend. Educate.**



These paths help you stick to a specific area of focus – so whether you want to focus on evaluating next steps, enhancing business outcomes, extending HR's impact or educating your workforce (or a little of each), we've made it easy for you to identify which sessions you'll want to attend! Regardless of which path you choose, I know you'll learn a lot and leave Connect feeling inspired – just as I'm inspired by you!

Lina Tonk

Lina Tonk

Chief Experience Officer,
isolved



Don't Miss Tuesday Night's Event!

🕒 6:00-8:00 PM

Customer

Networking

Welcome Reception

WELCOME RECEPTION

Celebrate the official kickoff of 2023 isolved Connect!

Tuesday
**Oct
17**

Customer

Intensive

🕒 12:00 - 1:30 PM

Registration

Customer

Intensive

🕒 12:00 - 1:30 PM

EDUCATE: Fundamental Reporting: Master the Report Writing Basics

Crystal Summey

Customer

Intensive

🕒 12:00 - 1:30 PM

ENHANCE: Ace the Experience: Unleashing the Power of Applicant Engagement & Onboarding

Brad Ronek, Heidi Barnett, Bridget Fleagle



Customer

Intensive

🕒 12:00 - 1:30 PM

EVALUATE: Payroll Palooza: Rocking the Road to Payroll Success (beginners' course)

LenaMarie Queen



Customer

Intensive

🕒 12:00 - 1:30 PM

EVALUATE: Predictive People Analytics Benchmark Insights

Tom McKeown



Customer

Intensive

🕒 1:45 - 3:15 PM

EDUCATE: Beyond the Fundamentals: Advanced Techniques in Report Writing

Crystal Summey

Customer

Intensive

🕒 1:45 - 3:15 PM

EDUCATE: Navigating the Path to a Seamless Open Enrollment

Lisa Athon



Customer

Intensive

🕒 1:45 - 3:15 PM

EDUCATE: Tracking Ninja: Unleash the Power of Occurrence Tracking & Notifications

Mike Kolby



Connect 2023

is a fabulous in-person educational event that will change the way you approach employee experience – for a better today, and a better tomorrow.

- 36 hours of CE Credits
- 80+ Sessions
- Inspirational Keynotes
- Peer Networking
- Insights
- Knowledge
- Evaluate
- Enhance
- Extend
- Educate

Tuesday
**Oct
17**

Customer

Intensive

🕒 1:45 - 3:15 PM

ENHANCE: Performance Reviews that Drive Employee Satisfaction: The Power of Feedback & Growth

Meghan Mikolajewski



Network

Partner

🕒 2:00 - 4:00 PM

Network Roundtables

Lesley Lyons

Customer

Intensive

🕒 3:45 - 5:15 PM

EDUCATE: A Hands-On Journey to Optimize Compensation Management

Megan Nielson



Customer

Intensive

🕒 3:45 - 5:15 PM

EDUCATE: Navigating the ACA Maze: Finding the Correct Path to Achieve ACA Success

Sarah Ufen



Customer

Intensive

🕒 3:45 - 5:15 PM

EDUCATE: Supercharge Your Operations with Advanced Workflows

Karen Shoemaker



Customer

Intensive

🕒 3:45 - 5:15 PM

EVALUATE: HR Suite Power Boost: Unleashing the Full Potential of Analytics, Certifications, Training & Org Charts

LenaMarie Queen



Network

Partner

🕒 4:00 - 5:30 PM

Network Awards & Reception

Customer

Networking

🕒 6:00 - 8:00 PM

Welcome Reception

“The difference between ordinary and extraordinary is that little extra.”

-Jimmy Johnson

For the latest session location and agenda updates scan below to use our mobile app.



Coming Wednesday!

🕒 8:00-9:30 AM

Customer

Keynote

Welcome to Connect

Mark Duffell

Future of Work

James Norwood

Keynote: The Spark & The Grind

Erik Wahl



Mark Duffell
Chief Executive
Officer, isolved

James Norwood
EVP, Chief Strategy
Officer, isolved



**Erik
Wahl**

Erik C. Wahl is an American graffiti artist, speed-painter, author, motivational speaker and entrepreneur based in San Diego. He owns The Wahl Group, a consultancy firm, and has spoken at conventions by Microsoft, Disney and other corporations.

Come Join Us Wednesday Night!

🕒 5:20-7:20 PM

Customer

Networking

Wine & Mingle in the Marketplace

WINE & MINGLE

Join us for a networking event!
Wine, cocktails and small bites will be served.

Wednesday
**Oct
18**

General

🕒 7:15 - 8:00 AM

Breakfast



Customer

General

🕒 9:30 - 9:45 AM

Break

General

Keynote

🕒 8:00 - 8:10 AM

Welcome to Connect

Mark Duffell



Customer

Training

🕒 9:45 - 10:35 AM

EDUCATE: COBRA Made Easy: Streamlining Client Services for Smooth Offboarding

TBA Product



General

Keynote

🕒 8:10 - 8:40 AM

Future of Work

James Norwood



Customer

Training

🕒 9:45 - 10:35 AM

ENHANCE: Spark a Friendly Workplace Competition: Isolated Rewards & Recognition

Meghan Mikolajewski



General

Keynote

🕒 8:40 - 9:30 AM

Keynote: The Spark & The Grind

Erik Wahl



Customer

Training

🕒 9:45 - 10:35 AM

EVALUATE: Compensation Management Revolution: Streamline Your Process from Start to Finish

Megan Nielson



“Progress is impossible without change, and those who cannot change their minds cannot change anything.”

-George Bernard Shaw

For the latest session location and agenda updates scan below to use our mobile app.



Wednesday
**Oct
18**

Customer

Product

🕒 9:45 - 10:35 AM

EVALUATE: isolved in Real Life: Healthcare, HR & Helpful Advice for Recruiting, Retention & Roadmap with Guttenberg Municipal Hospital & Clinics

Lina Tonk, Mary Kay Kirgis



Customer

Product

🕒 9:45 - 10:35 AM

EVALUATE: isolved in Real Life: Recruiting & Retaining Top Talent in a Competitive Job Market with Nlets

Chris Kirby, Suzanne Church



Network

Partner

🕒 9:45 - 10:35 AM

Marketing Magic: The Power of Demand Generation on a Budget

Tom Taylor

Network

Partner

🕒 9:45 - 10:35 AM

Owners Meeting with isolved Leadership

Mike Flannery, Todd LaFever, James Norwood, Pragma Gupta, Kris Johnson



Network

Partner

🕒 9:45 - 10:35 AM

Payroll Power-Up: Gather the Secrets to Becoming a Payroll Expert

Brad Ronek, Dawn Bilski



General

🕒 10:35 - 11:05 AM

Networking Break

Network

Partner

🕒 11:05 AM - 12:00 PM

Cashing In: Conquering Month-End & Quarter-End with the Treasury Toolkit Part 1

Emma Nelson, Carol Razooki



Customer

Product

🕒 11:05 AM - 12:00 PM

ENHANCE: Paint the Picture: The Future of HR Technology

Geoff Webb, Amy Mosher



“Ability is what you’re capable of doing. Motivation determines what you do. Attitude determines how well you do it.”

-Lou Holtz

For the latest session location and agenda updates scan below to use our mobile app.



Wednesday
**Oct
18**

Customer

Training

🕒 11:05 AM - 12:00 PM

EDUCATE: The Grand Finale: Mastering Your Year-End Strategy

Alysha Yearling



Customer

Product

🕒 11:05 AM - 12:00 PM

ENHANCE: Stops Along Your HCM Journey: How to Plan Your Own HR Roadmap

Reannah Gilenson



Customer

Product

🕒 11:05 AM - 12:00 PM

ENHANCE: Translating EX: How to Talk Customer Experience, IT & Marketing

Lina Tonk, Mike Flannery, Todd Atwood, Amberly Dressler

Customer

Training

🕒 11:05 AM - 12:00 PM

ENHANCE: Unlocking AEE: Embrace the Future of Work

Aleks Boruk, Jodi Norris



Customer

Training

🕒 11:05 AM - 12:00 PM

EVALUATE: Benchmark Analytics

Tom McKeown



Customer

Product

🕒 11:05 AM - 12:00 PM

EXTEND: The Business of Employee Experience: Justifying Investments in Employee Experience Based on ROI Impact

Trevor McMullen, Evelyn McMullen



Network

Partner

🕒 11:05 AM - 12:00 PM

Unlocking the Power of Upselling: Maximizing Profits & Customer Satisfaction

Bruce Dennis, Amber Vernieuw



“We are what we repeatedly do. Excellence then, is not an act, but a habit.”

-Aristotle

For the latest session location and agenda updates scan below to use our mobile app.



Wednesday
**Oct
18**

General

🕒 12:00 - 1:00 PM

Lunch

Network

Partner

🕒 1:00 - 1:50 PM

Accelerating Efficiency & Usability: PEO Benefits

Megan Nielson



Customer

Training

🕒 1:00 - 1:50 PM

EDUCATE: Empowering Life Events: Utilizing isolved to Support Your Employees' Journey

Lisa Athon



Customer

Training

🕒 1:00 - 1:50 PM

EDUCATE: Prior Period Modification Made Effortlessly

Mike Kolby



Customer

Training

🕒 1:00 - 1:50 PM

EDUCATE: Seizing the Learning Journey: Empowering Employees to Drive their Development

Jon Sung, Kelli Rico



Customer

Product

🕒 1:00 - 1:50 PM

ENHANCE: Complement Your People Strategy with Compensation Management

Valerie Howard, Megan Nielson



Customer

Product

🕒 1:00 - 1:50 PM

EVALUATE: isolved in Real Life – Real or Not? Customers React to Emerging HR Trends

Larry Romero, Mary Kay Kirgis 🗣️, Julie Montgomery 🗣️

Customer

Product

🕒 1:00 - 1:50 PM

EXTEND: Compliance in California: Why What's Happening in the Golden State Matters to Any State

Carla Adams, Megan Coen, Larry Romero



“Work hard and be kind and amazing things will happen.”

-Conan O'Brien

For the latest session location and agenda updates scan below to use our mobile app.



Wednesday
**Oct
18**

Customer

Product

🕒 1:00 - 1:50 PM

EXTEND: Resource Connection: Get the Most Out of Your Isolated Investment

Paige La Fever, Janelle Sherman, Chris Kirby

Network

Partner

🕒 1:00 - 1:50 PM

Selling Superstars: Unveiling the Secrets of Building a High-Performing Sales Team – Insights from the Partner Panel

Todd Linton

General

🕒 1:50 - 2:05 PM

Break

Customer

Training

🕒 2:05 - 2:55 PM

EDUCATE: Driving Employee Growth: Harnessing Feedback and Goals for Effective Performance Management

Megan Mikolajewski



Customer

Training

🕒 2:05 - 2:55 PM

EDUCATE: Notice Up! Effortless Notices & Document Management for Smooth Operations

Crystal Summey



Customer

Training

🕒 2:05 - 2:55 PM

EDUCATE: Remote Control: Navigating the World of Virtual Workers

LenaMarie Queen



Customer

Product

🕒 2:05 - 2:55 PM

ENHANCE: Isolated Inspire: Women in Leadership Panel

Amberly Dressler, Lina Tonk, Pragya Gupta, Amy Mosher, Bridget Escobar, Stephanie Westphal

Customer

Product

🕒 2:05 - 2:55 PM

EVALUATE: The Top Traits of Every Successful HR Department

Geoff Webb, Megan Coen



“Opportunity is missed by most people because it is dressed in overalls and looks like work.”

-Thomas Edison

For the latest session location and agenda updates scan below to use our mobile app.



Wednesday
**Oct
18**

Customer

Product

🕒 2:05 - 2:55 PM

EXTEND: AI in HR for the SMB

Ben Eubanks, Tom McKeown



Network

Partner

🕒 2:05 - 2:55 PM

Marketing Success: Panel Session on Key Marketing Strategies & Tactics

Coastal, Payroll Network, Thread HCM, PeopleWorx

Network

Partner

🕒 2:05 - 2:55 PM

Success Seekers: Tap into isolated Customer Service Expertise — Q&A Session

Mike Flannery, Mark Weaver, Kris Johnson

General

🕒 2:55 - 3:25 PM

Networking Break

Customer

General

🕒 3:25 - 4:15 PM

Ask the Experts

Pragya Gupta, Christian Thompson, Jon Sung,

Dan Barrett, Kelli Rico



General

🕒 4:15 - 4:30 PM

Break

Network

Partner

🕒 4:30 - 5:20 PM

Bureau Builders: The Blueprint for Success - Insights from the Partner Panel on Building a Thriving Service Bureau

Mark Strippy

Customer

🕒 4:30 - 5:20 PM

Customer Advisory Board



“Nothing will work unless you do.”

-Maya Angelou

For the latest session location and agenda updates scan below to use our mobile app.



Wednesday
**Oct
18**

Customer

Training

🕒 4:30 - 5:20 PM

EDUCATE: Benefit Reconciliation Made Easy: Tools & Tips to Tackle the Challenge

Lisa Athon



Customer

Training

🕒 4:30 - 5:20 PM

EDUCATE: Efficient Schedule Changes: Take Control with isolated Schedule Rules

Michael Kolby



Customer

Product

🕒 4:30 - 5:20 PM

ENHANCE: All in On AI - Discover how isolated People Cloud Uses AI Today for a Better Tomorrow

Averie Sheppard, Myrna Diaz

Customer

Product

🕒 4:30 - 5:20 PM

EVALUATE: They Said, We Said – Employee & HR Leader Sentiment

Allie Howen, Susan Prebola



Customer

Product

🕒 4:30 - 5:20 PM

EVALUATE: You Are Here: Understanding Your HCM Maturity Model

Reannah Gilenson, Larry Romero



Network

Partner

🕒 4:30 - 5:20 PM

Exploring the isolated Marketplace

Melissa Versnik, Michael Dupont

Customer

Training

🕒 4:30 - 5:20 PM

EXTEND: How to Improve Your Visibility on Indeed

Heidi Barnett, Bridget Fleagle



Customer

General

🕒 5:20 - 7:20 PM

Wine & Mingle

“Clients do not come first. Employees come first. If you take care of your employees, they will take care of the clients.”

-Richard Branson

For the latest session location and agenda updates scan below to use our mobile app.



Coming Thursday!

🕒 12:00-12:50 PM

Customer

Keynote

From Compliant to Courageous

Learn from industry analyst and influencer Stacey Harris as she shares how to build an HR, benefits and payroll function that achieves your organization's business and talent goals.



Lina Tonk
Chief Experience
Officer, isolved



Stacey Harris

Stacey Harris is the Chief Research Officer, Managing Partner of Sapient Insights Group where she oversees their industry research work, including the esteemed Annual HR Systems Survey and White Paper, now in its 25th year.

Join Us on Thursday!

🕒 7:00-7:30 PM

Customer

People Heroes Awards

Customer Awards

Please join us in celebrating this year's Customer Awards as they are awarded live! Awards will be given for Engagement Program of the Year, Future of Work, Employee Experience Transformation, Judges' Choice and our coveted People Heroes Award. Don't miss out on an exclusive 2024 Connect announcement too!



Party With Us Thursday Night!

🕒 7:30-11:59 PM

Customer

Networking

isolated Connect Wrap Party



GIN BLOSSOMS

WRAP PARTY!

Close out isolated Connect with live music, networking and evening-long celebrations you won't want to miss!

Thursday
Oct
19

General

🕒 7:30 - 8:30 AM

Breakfast

Network

Partner

🕒 8:30 - 9:20 AM

Behind the Scenes: Exploring the SB Report Writer & Client Copy Tool

Myrna Diaz

Customer

Training

🕒 8:30 - 9:20 AM

EDUCATE: Futuristic Flashback: Reflecting on the Breakthrough Functionality of 2023

Karen Shoemaker

Customer

Training

🕒 8:30 - 9:20 AM

EDUCATE: Scheduling Superheroes: The Power of Labor Management & Cost Savings

Mike Kolby



Customer

Product

🕒 8:30 - 9:20 AM

ENHANCE: All in On AI - Discover How isolved People Cloud Uses AI Today for a Better Tomorrow

Averie Sheppard, Kelli Rico

Customer

Product

🕒 8:30 - 9:20 AM

EVALUATE: The Business of Employee Experience: Justifying Investments in Employee Experience Based on ROI Impact

Trevor McMullen, Evelyn McMullen



Customer

Product

🕒 8:30 - 9:20 AM

EVALUATE: You Are Here: Understanding Your HCM Maturity Model

Reannah Gilenson, Larry Romero



Customer

Product

🕒 8:30 - 9:20 AM

EXTEND: Compliance in California: Why What's Happening in the Golden State Matters to Any State

Carla Adams, Megan Coen, Larry Romero



“Anyone who stops learning is old, whether he’s twenty or eighty.”

-Henry Ford

For the latest session location and agenda updates scan below to use our mobile app.



Thursday
Oct
19

Customer

Training

🕒 8:30 - 9:20 AM

EXTEND: Unleashing the Power of People Heroes Community & University: Maximize Your Learning Potential

Paige La Fever, Walker Morrow



Network

Partner

🕒 8:30 - 9:20 AM

Time Wizardry: The Art of Workforce Management & Becoming a Subject Matter Expert

Brad Ronek



General

🕒 9:20 - 9:35 AM

Break

Customer

General

🕒 9:35 - 10:25 AM

EVALUATE: Live Customer Panel, Priorities, Plans & Pain Points

Lina Tonk, Geoff Webb



Network

Partner

🕒 10:25 - 10:55 AM

Networking Break

Network

Partner

🕒 10:55 - 11:45 AM

ASO Year-End Extravaganza: Celebrate Success & Set the Stage for a Bright New Year

Alysha Yearling

Customer

Product

🕒 10:55 - 11:45 AM

ENHANCE: Complement Your People Strategy with Compensation Management

Valerie Howard, Megan Nielson



Customer

Training

🕒 10:55 - 11:45 AM

ENHANCE: Making a Difference: Igniting Philanthropy in Your Organization

Jon Sung, Kelli Rico



“The expert in anything was once a beginner.”

-Helen Hayes

For the latest session location and agenda updates scan below to use our mobile app.



Thursday
**Oct
19**

Customer

Training

🕒 10:55 - 11:45 AM

EVALUATE: Growth Mode Activated: How isolated Propels Your Success

Aleks Boruk



Customer

Product

🕒 10:55 - 11:45 AM

EVALUATE: The Top Traits of Every Successful HR Department

Geoff Webb, Megan Coen



Customer

Product

🕒 10:55 - 11:45 AM

EXTEND: AI in HR for the SMB

Ben Eubanks, Tom McKeown



Customer

Training

🕒 10:55 - 11:45 AM

EXTEND: Recruitment Marketing & AI

Heidi Barnett, Bridget Fleagle



Customer

Product

🕒 10:55 - 11:45 AM

EXTEND: Resource Connection: Get the Most Out of Your isolated Investment

Paige La Fever, Janelle Sherman, Chris Kirby

Network

Partner

🕒 10:55 - 11:45 AM

PEO Power Hour: Exploring the Latest Updates in Workers' Compensation & More

Heather Sainz



Customer

General

🕒 11:45 AM - 12:00 PM

Break

Customer

Keynote

🕒 12:00 - 12:50 PM

From Compliant to Courageous - Learn from Industry Analyst & Influencer Stacey Harris

Stacey Harris, Lina Tonk



“Most of us spend too much time on what is urgent and not enough time on what is important.”

-Stephen Covey

For the latest session location and agenda updates scan below to use our mobile app.



Thursday
**Oct
19**

General

🕒 12:50 - 1:50 PM

Lunch

Network

Partner

🕒 1:50 - 2:40 PM

Customer Loyalty Secrets: Boosting Stickiness through Benefit Services & Premier 401(k)

Melissa Versnik, Vickie Burke

Customer

Training

🕒 1:50 - 2:40 PM

EDUCATE: Hardware Unplugged: Exploring the Future of BIPA, Multi-Company Support & Beyond

Brad Ronek



Customer

Training

🕒 1:50 - 2:40 PM

EDUCATE: Hidden Gems: Uncovering the Untapped Value of isolved's Top 20 Under-Used Features

Sarah Ufen, Aleks Boruk



Customer

Training

🕒 1:50 - 2:40 PM

EDUCATE: Hidden Gold: Leveraging Audit Reports for Improved Profitability

Crystal Summey



Customer

Product

🕒 1:50 - 2:40 PM

ENHANCE: Paint the Picture: The Future of HR Technology

Geoff Webb, Amy Mosher



Customer

Product

🕒 1:50 - 2:40 PM

ENHANCE: Translating EX: How to Talk Customer Experience, IT, Finance & Marketing

Lina Tonk, Mike Flannery, Todd Atwood, Amberly Dressler

Customer

Product

🕒 1:50 - 2:40 PM

EVALUATE: isolved in Real Life: Recruiting & Retaining Top Talent in a Competitive Job Market with Nlets

Chris Kirby, Suzanne Church



“There is no such thing as work-life balance. It is all life. The balance has to be within you.”

-Sadhguru

For the latest session location and agenda updates scan below to use our mobile app.



Thursday
**Oct
19**

Customer

Product

🕒 1:50 - 2:40 PM

EVALUATE: They Said, We Said – Employee & HR Leader Sentiment

Allie Howen, Susan Prebola

Network

Partner

🕒 1:50 - 2:40 PM

PEO Year-End Success: Navigating the Path to a Smooth Year-End Process

Heather Sainz



General

🕒 2:40 - 2:55 PM

Break

Network

Partner

🕒 2:55 - 3:45 PM

Cashing In: Conquering Month-End & Quarter-End with the Treasury Toolkit Part 2

Emma Nelson, Carol Razooki



Customer

Product

🕒 2:55 - 3:45 PM

EDUCATE: Explore the Intricacies for Optional Benefit Management

Lisa Athon



Customer

Training

🕒 2:55 - 3:45 PM

EDUCATE: Troubleshooting Masterclass: Tips & Tricks for Overcoming Common Challenges

Sarah Ufen



Customer

Training

🕒 2:55 - 3:45 PM

EDUCATE: Unleashing Mobility: isolved Mobile App for On-The-Go-Work

Myrna Diaz, Kelli Rico

Customer

Product

🕒 2:55 - 3:45 PM

ENHANCE: Stops Along Your HCM Journey: How to Plan Your Own HR Roadmap

Reannah Gilenson



“If you get tired,
learn to rest, not
to quit.”

-Banksy

For the latest
session location
and agenda
updates scan
below to use our
mobile app.



Thursday
**Oct
19**

Customer

Product

🕒 2:55 - 3:45 PM

EVALUATE: isolved in Real Life: Performance Measurement & Management for an Engaged & Developed Workforce with Hames Corporation

Allie Howen, Susan Prebola, Jaylene Owen



Customer

Product

🕒 2:55 - 3:45 PM

EVALUATE: isolved in Real Life – Real or Not? Customers React to Emerging HR Trends

Larry Romero, Mary Kay Kirgis 🗣️, Julie Montgomery 🗣️

General

🕒 3:45 - 4:15 PM

Networking Break

Customer

General

🕒 4:15 - 5:05 PM

Live: Roadmap Session

Geoff Webb, Kelli Rico

Customer

General

🕒 7:00 - 7:30 PM

ENHANCE: People Heroes Awards

Lina Tonk, Mike Flannery, Amberly Dressler

Customer

General

🕒 7:30 - 11:59 PM

Wrap Party

With special live performance from the Gin Blossoms



“Be sure when you step, step with care and great tact. And remember that life is a great balancing act.”

-Dr. Seuss

For the latest session location and agenda updates scan below to use our mobile app.



2023 Conference Map

- Registration
- Session Rooms
- Network Sessions
- Keynote Ballroom
- Marketplace
- Customer Lounge
- People Heroes Counter
- Legends Bar



Evaluate. Enhance. Extend. Educate.

