

# Support Staff Breakout Session Overview

## Empower Your Team at ConnectED: Support Staff Track

At the heart of every successful business, there is a strong support team. The Support Staff track at ConnectED is dedicated to enhancing the skills and capabilities of individuals supporting Osaic Financial Professionals. Alongside practical training and professional development, attendees will connect with peers, share ideas and best practices, and build a supportive community.

## In Person or Virtual—You Decide

Whether you're joining us in San Antonio or participating remotely, ConnectED offers flexible access designed to fit your needs. **A curated selection of expert-led streaming breakout sessions is available to support staff as a helpful guide—not a required track.** Attendees are encouraged to choose the sessions that best align with their role and goals within their practice, ensuring a personalized and meaningful learning experience from anywhere.

## How to Use This Quick Guide

- **Tracks:** Sessions are grouped by focus area.
- **Key Takeaways:** A quick summary of what you'll learn. Double-click a session title to view the full breakout description. **Note: Breakout session registration opens in late July. Conference registration is required to build your agenda.**
- **Format:** Indicates how the session is delivered—*Tech Room* (interactive, hands-on session; bring a laptop) or *Streaming* (view from anywhere, no equipment needed).

## Track: Growth & Productivity

Session Title	Key Takeaways	Format
<a href="#">eSignature Best Practices Across Osaic Platforms</a>	Compare eSignature tools and learn submission tips.	<i>Tech Room</i>
<a href="#">Generating Reports on the WMP</a>	Learn to generate reports at multiple levels in WMP.	<i>Tech Room</i>
<a href="#">Managing Client Access in OneView</a>	Set up and manage client access tiers.	<i>Tech Room</i>
<a href="#">Mastering Custom Reporting in OneView</a>	Use Report Designer for advanced reporting.	<i>Tech Room</i>
<a href="#">Mastering NetX360+</a>	Tips, shortcuts, and custom alerts.	<i>Tech Room</i>
<a href="#">Tips for Success: Best Practices for new eQuipt</a>	Navigate new features and updates.	<i>Tech Room</i>
<a href="#">Your OneHub Dashboard, Your Way</a>	Hands-on dashboard customization.	<i>Tech Room</i>
<a href="#">Client Service Excellence</a>	Build rapport and handle client issues effectively.	<i>Streaming</i>
<a href="#">Compliance Hot Topics</a>	Stay current on compliance and fraud prevention.	<i>Streaming</i>

## Track: Time & Efficiency

Session Title	Key Takeaways	Format
<a href="#">6 Strategies to Make Your Day Run Smoother</a>	Mindfulness, wellness, and prioritization tips.	<i>Streaming</i>
<a href="#">Mastering Wealthscape</a>	Discover hidden features and shortcuts.	<i>Tech Room</i>
<a href="#">Optimizing Support Center</a>	Navigate and use Support Center effectively.	<i>Tech Room</i>
<a href="#">Smarter Operations: Part 1</a>	Time-saving tools and home office insights.	<i>Streaming</i>
<a href="#">Smarter Operations: Part 2</a>	More tools and behind-the-scenes insights.	<i>Streaming</i>

## Track: Choice & Flexibility

Session Title	Key Takeaways	Format
<a href="#">Personal and Professional Development for Staff</a>	Leadership, delegation, and work/life balance.	<i>Streaming</i>