




Panel: A conversation about achieving customer loyalty

Lavesh Chatlani
Strategic Engagement Manager, Intuit



A photograph of two young women with long blonde hair talking outdoors at night. The woman on the left is in profile, looking towards the woman on the right. They are both wearing dark jackets. The background is dark with some blurred green lights, possibly from trees or streetlights. The overall mood is intimate and conversational.

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CPD Process

In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

About today's moderator



Lavesh Chatlani

Strategic Engagement Manager, Intuit

@thelavesh

This will be a good session if....

We obtain 2 – 3 new ideas from our peers on how we can achieve customer loyalty, that can be practically implemented into our business.

Today's panelists



Jag Bath
Cloud Partner,
CapexCPA



David DiNardo
President & CEO
Envolta



Varun Sehgal
Partner
**Think Accounting &
Consulting**

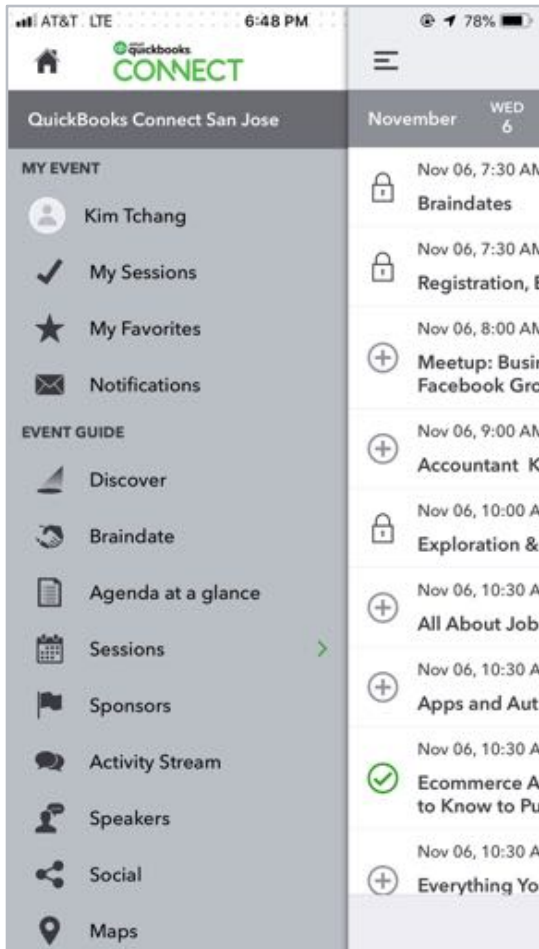


Questions?

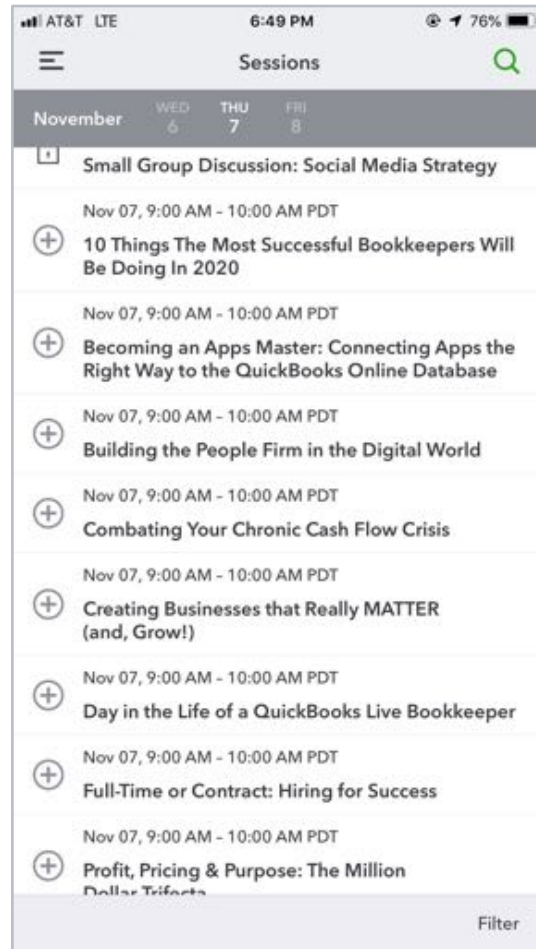
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

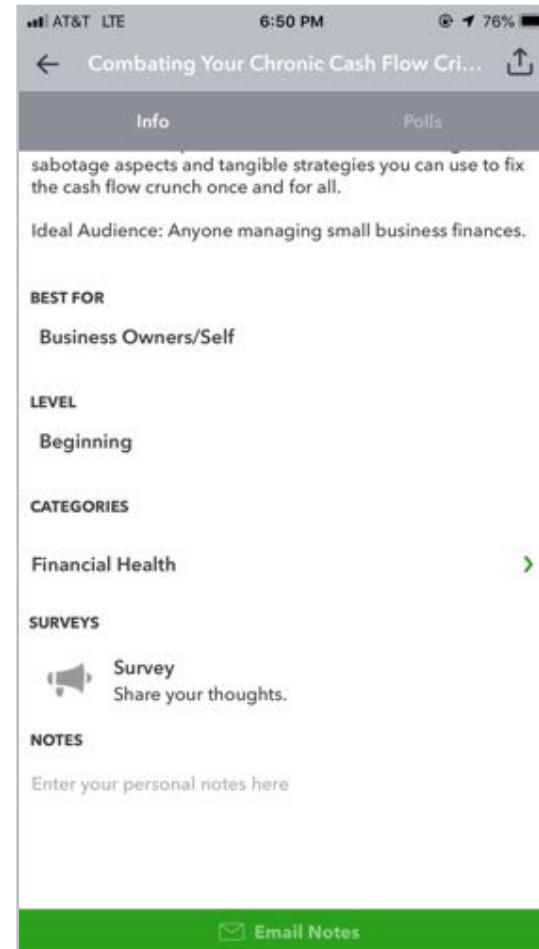
1. Select Sessions



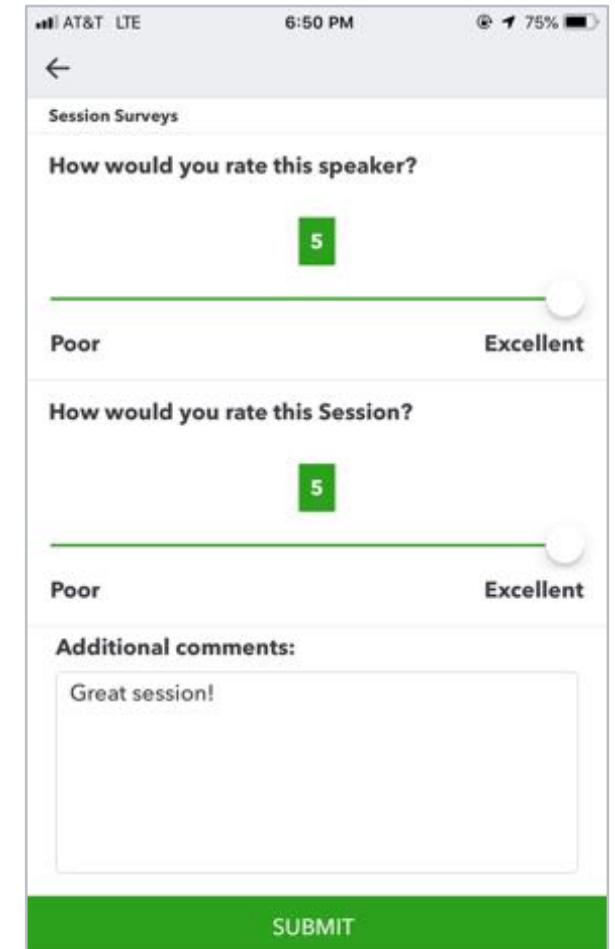
2. Select Session Title



3. Select Survey



3. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://can.quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for December 10, 2023. The page is titled "December 10 Accountant Day" and includes a navigation menu with options like "Why Attend", "Agenda", "Speakers", "Pricing", "Sponsors", "Travel", and "FAQ". A "Print Agenda" button is visible in the top right. The main content area features a search bar for sessions and a filter section with categories: "Organizational Culture", "Life & Business Skills", "Technology Training", "Business Growth", "Advisory", and "Financial Health". The agenda is organized by time slots, with sessions listed from 7:30-9:00 am to 11:00 am-12:00 pm. Each session has a plus sign (+) to its right, indicating that more information can be viewed. The session "Creating Your Small Business Culture" is highlighted, showing a detailed description, ideal audience, best for, speakers, location, track, CPD hours, and level.

Time Slot	Session Title	Action
7:30-9:00 am	Registration, Breakfast & Exploration	+
8:00-8:45 am	Meetup: New to Networking	+
9:00-10:00 am	Morning Keynote	+
10:00-11:00 am	Exploration & Connection	+
10:15-11:00 am	Meetup: Women in the Workforce	+
11:00 am-12:00 pm	Breakout Sessions	
	Creating Your Small Business Culture	+
	Understanding Personalities for Better Communication	+
	How to Use QuickBooks for Your Small Business: Introduction	+

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