This template is provided as a guideline to assist you with making a business case to attend The EHSQ Alliance Conference 2018. Any text highlighted in yellow needs to be replaced with your own information. Please feel free to use as little or as much of the following information as necessary to support your case.

For additional details, please contact the EHSQ Alliance Conference Team: [allianceconference@intelex.com](mailto:allianceconference@intelex.com)

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**Memorandum**

From

To

Date

Subject

**Purpose**

The purpose of this memo is to obtain funding and leave approval to attend the Intelex industry conference, The EHSQ Alliance Conference, in Austin, Texas, from April 18 – 20, 2018.

With an anticipated 700+ Environmental, Health & Safety and Quality professionals from various industries, the conference provides an excellent opportunity to participate in Intelex led training sessions, learn best practices/key insights from Intelex power users, and expand professional networks.

**Benefits of attending the Intelex User Conference:**

*For our company:*

* Achieve Our Goals Faster. The presentations will help us achieve our business goals of [streamlining/standardizing processes, increasing efficiency, etc.] because I will be able to learn best practises from organizations in the industry who are leveraging Intelex for the same purposes that we are.
* Fast Track Training. I’ll be able to get up to speed faster and bring that information back to the team.
* Improve User Adoption of Intelex. One of the most popular sessions is on how other companies are building excitement about using the system! I’ll learn strategies that we can use here too**.**
* Sneak Peek at What’s Coming. Sessions will talk about new products and initiatives that Intelex is pursuing that may transform or improve aspects of our organization/department.
* Explore New Possibilities**.** Different companies are using Intelex software in innovative ways to transform their organizations, I’ll learn more about what is possible to do with the system in the future.
* Team Building.If we send both myself and [insert colleague’s name], we’ll be working together to ensure that our company is a best-in-class organization when it comes to using the Intelex system.

*For my individual professional development:*

* I’ll be more efficient at my job. With a minimum of 4 hours of hands-on training conducted by Intelex experts and consultants for no additional cost other than the conference pass; I’ll improve my knowledge of how to use the Intelex system.
* I’ll make connections with local and global Intelex users. I will be able to connect with people in our area who are also using Intelex and start conversations that will continue after the conference about other ways they are using the system.
* I’ll connect Industry experts. Industry and product roundtables offer one-on-one and group interaction with a variety of users and Intelex representatives, sharing product insights and industry knowledge.
* I’ll learn Intelex best practises in expert-user led sessions including training, user best practices, tips & tricks, etc. that introduce new ideas and potential opportunities to further enhance the company system.
* I’ll develop a network of Intelex users from around the world. Excellent networking opportunities, including a special networking night focused on making additional connections in the Intelex community which can be leveraged post-conference through Intelex-Exchange, the online Intelex user community and resource centre.

On return to work, the information collected, which will include training manuals, summaries and presentation slides, would be shared with colleagues and used to further train internally and enhance use of the system and overall performance.

**Background**

*About Intelex*

Intelex has been developing, implementing and supporting software for Environmental, Health and Safety, and Quality management for over twenty years. Their worldwide client base of over 1,000 attendees and 1,000,000 system users depend on their software to capture, track and report on essential corporate data.

*How We use Intelex*

[**Insert your background, current work profile, history attending the user conference (if any), current matters that make Intelex relevant to your everyday practice**]

**About the EHSQ** **Alliance Conference**

The conference runs over two days, including guided training sessions, multiple streams of topics per day, and numerous networking opportunities.

*Speakers/Sessions at the Conference*

Typically the agenda has 15+ Intelex client speakers from various companies like Nestlé, Campbell Soup Company, NRG Energy, Toyota Motors, etc., present on process or product related experiences with the Intelex system. Sessions range in topics like pre/post implementation, reporting, application setup, project roll-out, user adoption and more. The agenda also includes presentations and panel discussions from Intelex specialists and executives, including updates from Intelex President and CEO and other senior leadership team members.

*Training Sessions at the Conference*

Conference training sessions are run in different streams, with different options available. All training materials (workbooks and presentation slides) from each session are provided to the attendee electronically, regardless of which sessions they attend, to enable attendees to share the details and enable the team’s skills. This is a benefit only given to conference attendees.

*Networking Opportunities*

|  |  |
| --- | --- |
| **Sample of Represented Industries** | **Sample of Attendee Professional Titles** |
| * Aviation & Aerospace * Construction * Education * Energy – Electricity * Energy – Oil & Gas * Food & Beverage * Government (Federal, State/Provincial, Military) * Healthcare and Medical * Metals and Mining * Chemical * Manufacturing * And more | * Environmental Analyst * Safety Specialist * EH&S Manager * IT Specialist * Risk Advisor * VP of Administration * Compliance Manager * Systems Coordinator * Quality Inspector * Director of Engineering * Business Analyst * Training Coordinator * Environmental Affairs Manager * Audit Manager * VP of QMS |

**Financial Analysis**

The table below summarises the full cost for [**insert name**] to attend the Conference:

|  |  |  |
| --- | --- | --- |
| **Item** | **Comment** | **Cost (USD)** |
| Conference fees |  | xxxx |
| Flights |  | xxxx |
| Accommodation |  | xxxx |
|  | **Total** | **[insert]** |

**Timeframe**

Registration for The Alliance Conference remains open. To secure the cheapest flights and accommodation, travel arrangements would need to be booked by no later than March 27, 2018. Discounted hotel rooms must be booked as soon as possible, they sell out quickly.

**Support**

[**any particular endorsements from your supervisor etc if applicable**]

I would be happy to discuss this proposal further by teleconference or in person, at your convenience.

[**insert signoff**]