



ITA Mobile  
Your Meeting Guide  
<https://eventmobi.com/itafall2022>



#ITAFall22

**Sunday, December 4**

7:00AM - 1:30PM	Optional Social Events
2:30PM - 7:30PM	Badge Pickup Waller Ballroom Foyer, 3rd Floor
3:30PM - 4:30PM	Meet, Greet and Eat Session Waller Ballroom E/F
4:30PM - 6:00PM	ITA Opening Session Waller Ballroom C/D President's Welcome - Shawn Slavin Celebrating 25 Years Of ITA - President's Panel - Ron Eagle, Stan Mork and Shawn Slavin - Facilitated by Mark Severance KEYNOTE - The Economy In 2023: Slowing But Hopefully Not Reversing Elliot Eisenberg - Chief Economist for GraphsandLaughs, LLC
6:00PM - 7:30PM	Welcome Reception Zanzibar, 7th Floor
7:30PM	Dinner On Your Own and Various Partner Events

**Monday, December 5**

7:00AM - 5:00PM	Badge Pickup Waller Ballroom Foyer, 3rd Floor
8:00AM - 10:00AM	Monday Opening Session Waller Ballroom C/D President's State Of The Association - Shawn Slavin, ITA President KEYNOTE - Leadership "Big Tasks" - How Leaders And Companies Thrive Amidst Disruption And Uncertainty Leo Tilman, President and CEO of Tilman & Company

TRACKS AND SESSIONS	Consulting & Reselling (CR)		Internal Tech Leaders (ITL)	
	CR TRACK 1 Waller D	CR TRACK 2 Waller C	ITL STRATEGIC Waller A/B	ITL TACTICAL Waller E/F
10:30AM - 12:00PM	Service As A Subscription - Performing Examples From The VAR Community	Content Marketing Is A Team Sport!	Office Of The Future, Changes In Employee And Partner Mindsets	Managing And Supporting Offshore Teams
12:00PM - 1:15PM	Lunch Moontower Hall			
1:15PM - 2:30PM	EOS - Do We Really Need One More Acronym? The Answer Is YES!	Practical/Applied IMPROVISATION For Leaders Of People	Post COVID Infrastructure Models	Data And Integrations (How Do We Manage Access For Data Visualizations And Other Uses)
2:45PM - 4:00PM	Customization As A Service (CaaS): How Do We Leverage Back-end Customizations To Provide A Front End Competitive Advantage?	Marketing Strategies Seen In The VAR Community	Enterprise Resource Planning in 2022 (Closed Session - ITL Members Only)	Data Ingestion And Toolsets
4:15PM - 5:15PM	The Soul Of Enterprise Live From The ITA!	What Is Matter Management And Why Should You Care?	ITL Strategic Roundtables	ITL Tactical Roundtables
6:30PM - 9:30PM	Reception and 25th Anniversary Dinner Party Moontower Hall			

**Tuesday, December 6**

7:00AM - 8:00PM	Breakfast Moontower Hall			
TRACKS AND SESSIONS	Consulting & Reselling (CR)		Internal Tech Leaders (ITL)	
	CR TRACK 1 Waller D	CR TRACK 2 Waller C	ITL STRATEGIC Waller A/B	ITL TACTICAL Waller E/F
8:00AM - 9:15AM	Serving Non-Profit Organizations - It Goes Beyond Statement Titles	Support Best Practices - Staying Ahead Of The Curve	Employee Experience Of The IT Shared Service Professional	Contract Management Tools And Apps
9:30AM - 10:45AM	Start, Stop & Continue: The Lessons Learned From The Pandemic Around Engagement	Project Mangement™ To Project Management - Distinguish, Develop & Deliver	Data Privacy From A Strategic Perspective Waller E/F	
11:00AM - 12:15PM	In Search Of The Next Big Thing To Drive Your Top Line Sales And Services Revenue	Answering Customers' Needs For Low/No Code Solutions	Current Organizational Charts - Firm Updates And Overview (Closed Session - CIOs only)	Back To The Office - How Firms Are Adapting
12:15PM - 1:30PM	Lunch Moontower Hall			
1:30PM - 3:00PM	Roundtables - Let's Continue The Conversation Preservation Of Talent - How To Preserve And Grow The Assets With Legs!		ITL Strategic Roundtables Audit Of The Future. Is There Life Beyond DAS? (Closed Session - CIOs only)	ITL Tactical Roundtables
3:00PM - 3:15PM	CR Wrap Up Session And Collaborative Adjournment Waller D		ITL Wrap Up Sessions And Collaborative Adjournment Waller E/F	

**Wednesday, December 7**

8:30AM - 3:00PM	ITA Leadership Alliance (ILA) Base Camp - Class of 2022-23 Meeting Room 403, 4th Floor Note: Session is NOT part of the ITA Collaborative. This is for the ILA Class.
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**December 4-6, 2022**  
Austin Marriott Downtown, Austin, Texas



## Session Descriptions and Speakers

**Consulting & Reselling - CR**  
**Internal Technology Leader Tactical - ITL-T**  
**Internal Technology Leader Strategic - ITL-S**

**Sunday, December 4 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)**

**4:30 – 4:45 pm**

### **President's Welcome**

**Room: Waller C/D**

*Shawn Slavin – ITA President, Owasso, OK*

ITA President Shawn Slavin will introduce our Fall Collaborative Committees and welcome our new members and guests. He will also provide an overview of the Fall Collaborative agenda prior to introducing our Sunday night keynote speaker.

**4:45 – 5:00 pm**

### **Celebrating 25 Years of ITA - President's Panel**

**Room: Waller C/D**

**Facilitator:**

*Mark Severance - RKL eSolutions LLC, Simi Valley, CA*

**Panel:**

*Ron Eagle – Past ITA President, Davidson, NC*

*Stan Mork – Past ITA President, Northfield, MN*

*Shawn Slavin – Current ITA President, Owasso, OK*

Join us for a panel with the current ITA President and the two past Presidents to hear about ITA's foundation and history!

**5:00 – 6:00 pm (60 CPE Minutes)**

### **KEYNOTE: The Economy In 2023: Slowing But Hopefully Not Reversing**

**Room: Waller C/D**

*Elliot Eisenberg – Graphs and Laughs, LLC, Ventura, FL*

Gain a better understanding of market conditions and what may lay ahead and why. Join the always-entertaining Bowtie Economist, Elliot Eisenberg, Ph.D., as he discusses all-new data points about the current and expected condition of the economy. You'll learn the most recent statistics on a multitude of key topics such as short-term economic growth prospects, the timing and likelihood of a recession, business and household sentiment, trends in corporate investment, auto manufacturing activity, new home construction activity, the health of the labor market, the condition of supply-chains, assorted measures of inflation, the thinking of the Fed, the path of interest rates, the impact of the new Covid-19 strains, and much more. After his prepared remarks, and time permitting, Dr. Eisenberg looks forward to taking questions from the audience. Be ready to take plenty of notes.

## Monday, December 5 – 8:00 – 10:00 am - Monday Morning General Session & Keynote (90 CPE Minutes)

8:00 – 8:30 am

### President's State Of The Association Discussion

Room: Waller C/D

*Shawn Slavin – ITA President, Owasso, OK*

ITA President Shawn Slavin will update the membership on the “what’s happening” in ITA. We'll discuss the current ITA Board of Directors Strategic Initiatives and other activities that the ITA Board and Staff are focusing on to continue to add value to your ITA membership.

8:30 – 10:00 am (90 CPE Minutes)

### KEYNOTE: Leadership "Big Tasks:" How Leaders and Companies Thrive Amidst Disruption And Uncertainty

Room: Waller C/D

*Leo M. Tilman – CEO, Tilman & Company, Denver, CO*

Today's operating environment is not for the faint-hearted. Seemingly never-ending disruption is making leadership teams feel behind the curve, unable to anticipate, prepare for, and dominate emerging trends, threats, and opportunities. Meanwhile, a bias for inaction – the inability to make purposeful and timely decisions under uncertainty – is pervasive among leaders and professionals. In their acclaimed book that foreshadowed the upheaval of the past two years, Leo Tilman and former NORAD Commander General Chuck Jacoby introduced a new paradigm for organizational agility, creating a strategic process that is being adopted by leading companies, investors, and government agencies. In his keynote address, Leo Tilman, a leading authority on strategy, risk intelligence, and finance and a long-time advisor to companies, governments, and institutional investors around the world, will discuss the critical organizational qualities and competencies required for thriving in a world of disruption and change: strategic agility, risk intelligence, and organizational alignment that fosters clarity, empowerment, and trust.

## Concurrent Sessions – By Date and Time

### Monday, December 5 - 10:30 am 12:00 pm – (90 CPE Minutes)

#### CR-1

### Service As A Subscription – Performing Examples From The VAR Community

Room: Waller D

*Jason Dennis - Kimberlite Partners, LLC, Danville, CA*

*Dirk Shimpach - goVirtualOffice, LLC, Waunakee, WI*

During this session our panel will be discussing:

- Why did the VAR make the decision to create a Service As A Subscription model?
- How did the VAR start the process of creating a Service As A Subscription model?
- What has been the impact to the business KPIs?
- Has there been any unforeseen benefits / drawbacks?
- What was the largest challenge to create the Service As A Subscription model?

## CR-2

### Content Marketing Is A Team Sport!

Room: Waller C

**Moderator**

*Scott Hollrah - Venn Technology, Grapevine, TX*

**Panelists**

*Melissa Bell – Venn Technology, Grapevine, TX*

*April Blankenship – Altec, Laguna Hills, CA*

*Darcy Boerio – DAB Partners, Brandon, FL*

With B2B buyers spending less than 15% of their time actually meeting with salespeople before making a purchasing decision, content marketing has become a top initiative for organizations looking to create demand to reach potential buyers in the remaining 85%. Historically, this has been delegated to marketing to build out in a silo, without effective mechanisms for subject matter experts within the organization to provide input. In this session, attendees will learn how organizations leveraging the expertise of teams outside of marketing are creating a competitive edge and reaching more buyers. Spoiler alert: it's a team effort. Attendees will learn:

- The origins of content marketing (and what we can learn from it)
- Real world examples of effective content marketing programs
- How to engage cross-functional teams in identifying content marketing opportunities
- Best practices for implementing (and measuring) content marketing

## ITL-S

### Office Of The Future, Changes In Employee And Mindsets

Room: Waller A/B

**Facilitator**

*Nick Cadden - Carr, Riggs & Ingram, LLC, Enterprise, AL*

**Panelists**

*Kenny Li - Citrin Cooperman, New York, NY*

*Aaron Miller – Senior Technology Specialist, Microsoft*

*Shindy Skaar - Senior Product Marketing Manager – Modern Work, Microsoft, Redmond, WA*

As technology advances, the opportunities available to our users for working in a non-traditional office environment continue to grow. With these opportunities also come challenges. In this session, we will discuss the ever-growing list of both and discuss which of these challenges are easily exploitable for simple quality of life improvement for all teams within the firm.

## ITL-T

### Managing And Supporting Offshore Teams

Room: Waller E/F

*Jed Balido – Citrin Cooperman, New York, NY*

*Jack Redfield - Cherry Bekaert LLP, Richmond, VA*

*John Parker - Carr, Riggs & Ingram, LLC, Enterprise, AL*

*Nicholas Schweitzer – Wipfli LLP, Wauwatosa, WI*

Long gone are the days when we only had to worry about where in the U.S. our Staff and Users traveled. As more work transitions to a global scale, it has become a greater challenge to continue to support a secure work environment while also overcoming cultural barriers, such as language, holidays, and overall difference in how things operate. Prepare to discuss the various solutions available to us today, and what option might be around soon!

**Monday, December 5 – 1:15 – 2:30 pm – (75 CPE Minutes)**

## **CR-1**

### **EOS - Do We Really Need One More Acronym? The Answer Is YES!**

**Room: Waller D**

**Facilitator**

*Scott Hollrah - Venn Technology, Grapevine, TX*

**Panelists**

*Patrick Johnson – Oasis Solutions Group, Louisville, KY*

*Edward Solomon – Net at Work, New York, NY*

*Curt Swindoll - EOS Worldwide, Plano, TX*

We live in a world of alphabet soup - ERP, CRM, POS, and the list goes on. Learn about the five tools and disciplines that make up the EOS model (Entrepreneurial Operating System) to help you gain traction in your organization. You will learn: What an EOS is, six key components that are important to every business, and how to get started with EOS.

## **CR-2**

### **Practical/Applied IMPROVISATION For Leaders Of People**

**Room: Waller C**

*Julian Schrenzel - DyNexus Recruiting & Staffing, Seattle, WA*

*Mark Severance - RKL eSolutions LLC, Simi Valley, CA*

This is an interactive workshop for business leaders that will provide participants the chance to learn and try out some new "soft" skills in a high-fun, low-stress & supportive environment. Learn how Improvisational Thinking and Action can help you to manage your employees with confidence and create a workplace culture that fosters employee satisfaction, engagement, and loyalty. If your brain can't handle one more PowerPoint deck and lecture, be prepared for an entirely different kind of session. Get ready to engage and interact with fellow ITAers and leave with a number of helpful new tools you can start using with your teams immediately.

## **ITL-S**

### **Post COVID Infrastructure Models**

**Room: Waller A/B**

**Moderator:**

*Kris Mihelich – Weaver, Forth Worth, TX*

**Speakers:**

*Marcus Hill – Senior Specialist-Azure, Microsoft, Austin, TX*

*Ameet Paranjape – Director, Atta & AI, Microsoft, Austin, TX*

As we expand our practices via acquisitions and adapt to changes caused by COVID, many firms are moving towards off-premises driven infrastructure. The explosion in Infrastructure as a Service offerings and web-based tools for managing critical processes is resulting in fewer on-premises resources and outsourcing solutions. Come join us in the session to discuss how our practice are adapting and share where you see things moving.

## **ITL-T**

### **Data And Integrations (How Do We Manage Access For Data Visualizations And Other Uses)**

**Room: Waller E/F**

*Scott Cowley – CLA, Minneapolis, MN*

*Calvin Leong – Aprio, Atlanta, GA*

*Chad Osgood – Diligence, LLC, Atlanta, GA*

Data, it is the reason we all have a job: Creating it, Securing it. Organizing it and eventually Purging it. But this lifecycle doesn't fully illustrate the process of acquiring new data as part of an M&A or other bulk additions. What steps must be taken differently in these cases to prepare the data for use within the firm's existing systems? Is it secure? Is it Manageable? We will look at the challenges that come with bringing in and integrating major systems together and ways to simplify this process.

**Monday, December 5 – 2:45 – 4:00 pm – (75 CPE Minutes)**

## **CR-1**

### **Customization As A Service (CaaS): How Do We Leverage Back-end Customizations To Provide A Front End Competitive Advantage?**

**Room: Waller D**

**Facilitator:**

*Joshua Gilstrap – e2b technologies, Inc., Mentor, OH*

**Panelists:**

*Julie Fitzpatrick – Meriture, Las Vegas, NV*

*David Fryauff – Lockstep Network, Inc., Seattle, WA*

*Lynne Henslee - e2b technologies, Inc., Chardon, OH*

Business Differentiation is essential for successful organizations. Offering customized software solutions, both stand alone and as add-ons, to your customers will help your organization stand out among your competitors. Creating and nurturing a development team that can rise to the challenge of a one size does not fit all practice will create new opportunities by forming tailored solutions built around and for each of your customers.

## **CR-2**

### **Marketing Strategies Seen In The VAR Community**

**Room: Waller C**

**Facilitator:**

*Ritch Haselden - Kimberlite Partners, LLC, Santa Cruz, CA*

**Panelists:**

*John Goode – Oracle NetSuite, Redwood Shores, CA*

*Bryan Parks – Sage, San Jose, CA*

This session is focused on providing a view into the marketing strategies, tactics and technologies used that successful partners are using to attract, grow and retain customers. During this session our panel will be discussing:

- What are the table stakes for VARs / Providers for successful marketing?
- Planning and Execution
- Key KPIS, Technologies, Staffing options
- Pitfalls to avoid

## **ITL-S**

### **Enterprise Resource Planning in 2022**

**(Closed Session - ITL Members Only)**

**Room: Waller A/B**

*Patrice Cappello – Workday, Westford, MA*

*Michael Connell – CLA, Middleton, WI*

*Michael Giuli – Cherry Bekaert LLP, Tampa, FL*

Curating the systems, processes and integrations on which to run the firm is much like a chess game. Is the firm optimized on your current configuration? What is the 3-5 year plan to echo firm growth and additional service offerings? Is it your turn to move and if so, which piece do you move\replace first? Join in the conversation during this strategic session as partner to the business of practice management.

## ITL-T

### Data Ingestion And Toolsets

Room: Waller E/F

*Scott Cowley – CLA, Minneapolis, MN*

*Renga Krishnan – Aprio, Atlanta, GA*

*Chad Osgood – Diligence, LLC, Atlanta, GA*

*Nick Piette – Celigo, San Mateo, CA*

Data ingestion: Each day in our Firms a long list of on-prem and cloud sources continuously generate tons of data. Usually in a few highly visible cases portions of this data is transformed into information to support business processes. In many other cases we are less deliberate about capturing messaging and putting this data to work for our Firms. Let's take a look fresh look at what how we might start being better in this area. We'll discuss MDM, ETL, ELT and other TLA's as well as tools, methodologies and considerations for why one tool or approach may fit your Firm's unique environment better than another.

**Monday, December 5 – 4:15 – 5:15 pm – 60 CPE**

## CR-1

### The Soul Of Enterprise Live From The ITA!

Room: Waller D

*Ed Kless – Sage, Allen, TX*

*Ron Baker – VeraSage Institute, Petaluma, CA*

This episode of The Soul of Enterprise will be recorded live with Ed Kless and Ron Baker. Bring your questions and challenges to share and discuss.

## CR-2

### What Is Matter Management And Why Should You Care?

Room: Waller C

*Brad Rogers – Onit, Houston, TX*

Wish you had gotten in on the ground floor when ERP and CRM systems first hit the market? There is a new wave of legal technology solutions in the Cloud coming to the mid-market that are driving innovation and digital transformation for the legal function of corporations around the world. Any time a legal matter is opened in an organization (think discrimination claims, contract disputes, arbitration, etc...), a 'matter' needs to be tracked both internally and externally with inside and/or outside legal counsel. How does an organization track these matters from an audit, risk and obligation perspective? In this session, we will discuss what Matter Management is and why it is such a hot topic being discussed and implemented in corporations across the globe.

## ITL-S

### ITL Strategic Roundtables

Room: Waller A/B

*Michael Connell – CLA, Middleton, WI*

Group discussion on pressing topics at the moment or carry over discussion from previously suggested topics.

## ITL-T

### ITL Tactical Roundtables

Room: Waller E/F

The ever-popular ITL Tactical Roundtables for this Fall Collaborative will be those listed above along with the Table Leaders. Discussion topics will be provided for each table...or feel free to branch out on your own!

- **Infrastructure / Engineering:** *Joe Persells – Citrin Cooperman, New York, NY*
- **Application Development:** *Chris Brandt – CBIZ Inc, Independence, OH*
- **Project Management:** *Kathy Rogers - Cherry Bekaert LLP, Charlotte, NC*
- **Security / Compliance:** *Jack Redfield - Cherry Bekaert LLP, Richmond, VA*
- **Support Desk / Service:** *Jed Balido – Citrin Cooperman, New York, NY*

**Tuesday, December 6 – 8:00 – 9:15 am - (75 CPE Minutes)**

## **CR-1**

### **Serving Non-Profit Organizations - It Goes Beyond Statement Titles**

**Room: Waller D**

*Bill Dean - Accounting System Integrators, LLC, North Haven, CT*

*Tom Fahres – Martin & Associates, Cincinnati, OH*

*Jim Norton - GRF CPAs & Advisors, Bethesda, MD*

*Jeremy Potoka - Presales Leader LLC, Lancaster, PA*

Let's dig into what's unique about working with nonprofit organizations. We will talk about their differences from multiple facets: cultural, mission-focused vs. profit-focused, the uniqueness of their accounting and financial reporting requirements, the ways a sales cycle can be conducted with nonprofit organizations, the skill levels and personality types you will often encounter in nonprofits, and the types of functionalities that are often most important to them. We will touch on, but not focus too heavily on, how pricing can differ for nonprofits. After this session, you should be able to:

- Describe the common behaviors of different nonprofit personas in a consulting/ERP sales cycle
- Articulate the high-level accounting challenges for nonprofits that set them apart from for-profit organizations
- Explain the types of reporting that nonprofit organizations are frequently looking for

## **CR-2**

### **Support Best Practices - Staying Ahead Of The Curve**

**Room: Waller C**

**Facilitator:**

*Marc Palombo – Onit, Houston, TX*

**Panelists:**

*Kayley Bell – DSD Business Systems, San Diego, San Diego, CAE*

*Vanessa Chambers – Martus Solutions, Greenfield, SC*

*Sushil Patel – Onit, Houston, TX*

*Todd Perlman - Business Technology Partners, LLP, Deerfield, IL*

In this panel discussion, we will have support leaders from a few of our ITA members discuss best practices within their organizations that they can share with the broader membership. This will be an interactive discussion with the panelists including audience participation to share our collective knowledge to help current members looking to improve how they support their clients today.

## **ITL-S**

### **Employee Experience Of The IT Shared Service Professional**

**Room: Waller A/B**

*Lori Christman – Cherry Bekaert LLP, Richmond, VA*

*Gertrude Van Horn – NCH Corporation, Irving, TX*

*Tom Wymer – Wimmer Solutions, Seattle, WA*

*Leonora Yurichak – CBIZ, Inc., Independence, OH*

In recruiting, retaining and growing talent in a highly competitive environment, it has never been more important to have a culture and plan in place. This includes clear roles, development plans, redundancy and succession. How are firms staffing project teams, measuring demand and capacity and running roles against the portfolios?



## ITL-T

### Contract Management Tools And Apps

Room: Waller E/F

**Facilitator:**

*Kris Mihelich – Weaver, Forth Worth, TX*

**Panelists:**

*Nicole Criley – Baker Tilly, Vienna, VA*

*Cain Elliott – Filevine, Salt Lake City, UT*

*Jim Farley – Ironclad, Walnut Creek, CA*

*Dena Piotter – CLA, New Ulm, MN*

*Brad Rogers – Onit, Houston*

Contract management means many things to many people. Many firms have managed contracts without a central repository and through unstructured processes. The implementation of a full Contract Management Lifecycle system can provide your firm with many of the advantages of other centralized systems.

Please join our panelists from both member firms and the vendor community as they discuss the challenges many face with contracts including defining contract standards, define ownership, centralizing storage and retrieval, integrating with other systems and processes.

**Tuesday, December 6 – 9:30 – 10:45 am - (75 CPE Minutes)**

## CR-1

### Start, Stop & Continue: The Lessons Learned From The Pandemic Around Engagement

Room: Waller C

*Jessica Quintanilla – Altec, Laguna Hills, CA*

Join us for an interactive discussion to connect and drive ideas about what's working and what's not. Two of our focus areas will be around changes in the sales cycle and work environment. Examples of this may be, how have working styles changed post Pandemic (the pros and cons of in person vs. remote)? How have sales cycles changed post Pandemic (the pros & cons of in person vs. remote selling).

## CR-2

### Project Mangement™ To Project Management – Distinguish, Develop & Deliver

Room: Waller C

*Tom Fahres – Martin & Associates, Cincinnati, OH*

*Moira Goggin – DSD Business Systems, Long Beach, CA*

*Rick Wilson – Martin & Associates, Cincinnati, OH*

Turn and face the strange, changes! Dive into distinguishing the type of project management required, developing plans and procedures, and delivering project management success. Learn how to embrace the changes for both customer and firm alike during an implementation project.

## ITL – S&T

### Data Privacy From A Strategic Perspective

Room: Waller E/F

*Shawn M. Gerlach – CLA, Greenwood Village, CO*

*Kenny Li – Citron Cooperman, New York, NY*

Data Privacy: Ignoring it is no longer an option as the proliferation of data privacy regulations is occurring at rapid pace. Given how many firms are structured with sharing of resources, is it realistic for our industry? What tools do we need to ensure we comply with the various regulations.

**Tuesday, December 6 – 11:00 am – 12:15 pm - (75 CPE Minutes)**

## **CR-1**

### **In Search Of The Next Big Thing To Drive Your Top Line Sales And Services Revenue**

**Room: Waller D**

*Terry Gren – Paystand, South Jordan, UT*

*Eric Riedinger – Onit, Houston, TX*

*Erika Williams – Tipalti, Fort Lauderdale, FL*

During this session, we will bring 3-5 solutions vendors to briefly give you an overview of their company, their defined target market and most importantly why should you care? The purpose is to find new, innovative solutions that our CR members can bring to market that will drive either net new or expansion revenue around top line sales growth and professional services revenue.

## **CR-2**

### **Answering Customers' Needs For Low/No Code Solutions**

**Room: Waller D**

**Facilitator:**

*Moira Goggin – DSD Business Systems, Long Beach, CA*

**Panelists:**

*Gary Feldman – I-Business Network, Marietta, GA*

*Joy Singleton – Celigo, San Mateo, CA*

*Carly Harding – New York, NY*

Do you answer customers' requirements for flexible workflow and analysis tools with legacy solutions or do you leverage your firm's expertise to give them the keys to drive their own solutions. We'll look at the pros and cons of each.

## **ITL – S**

### **Current Organizational Charts - Firm Updates And Overview**

**(Closed Session - CIOs only)**

**Room: Waller A/B**

*John A. Fleischer – CBIZ, Inc., Independence, OH*

“Life is like a cobweb, not an organization chart”

Ross Perot made this comment to capture his observation that organization charts reflect a very one-dimensional view of how businesses (an any organization) really operate. In this session we will start out with the “what”, focusing on the similarities and differences between the organizational structures of the different firms. We will start with some very basic observations about team sizes and how the teams are categorized, grouped, and the levels of hierarchy. We will then move into an interactive discussion of the “why”, exploring the decisions and choices that various firms made around staffing levels, roles, organizational design, etc.

## **ITL – T**

### **Back To The Office - How Firms Are Adapting**

**Room: Waller E/F**

*Jed Balido – Citrin Cooperman, New York, NY*

*Eric A. Galanti - CBIZ Gibraltar Real Estate Services, LLC., Chicago, IL*

*Natalie Kurinna - CBIZ Gibraltar Real Estate Services, LLC., Chicago, IL*

*Byrne Seamus - CBIZ Gibraltar Real Estate Services, LLC., Chicago, IL*

*Erin Sevitz – Eptura, Houston, TX*

During the pandemic, companies reacted to the challenges of maintaining productivity while keeping employee health in focus. Since then, firms have been repositioning for a return to the office. Let's take a closer look at how firms have responded to today's workplace environment as they transition their employees back into the office.

**Tuesday, December 6 – 1:30 – 3:00 pm - (90 CPE Minutes)**

## CR-ALL

### Roundtables - Let's Continue The Conversation

#### Preservation Of Talent - How To Preserve And Grow The Assets With Legs!

Room: Waller C/D

*Maggie Grier – Facilitator - Deltek, Herndon, VA*

*Michael Hines – Facilitator - Deltek, Trent Woods, VA*

*Julien Schrenzel – Moderator - DyNexus Recruiting & Staffing, Seattle, WA*

*Phil Sim – Blytheco, Irvine, CA*

Not being good at finding and attracting great talent is painful, but losing a good employee can be devastating, especially when you think about all the time and resources you invest before they begin producing results. Plenty of organizations try to avoid the loss of their best talent by investing in employee retention initiatives, but there are many cases where turnover is actually a good thing – like internal promotions or losing an employee who really wasn't a fit for the role.

Join us for a moderated interview with Blytheco's Chief Client Success Officer, Phil Sim, as he shares about Blytheco's STAR (Strategic Training and Recruiting) program followed by interactive, facilitated table discussions, led by Maggie Grier, Global Director of New Strategic Partnerships and Michael Hines, VP of Global Partnerships & Alliances with Deltek. This is your chance to work in small cohort groups to share and discuss your own challenges, successes and bright ideas on the topic of finding, attracting and keeping their best assets of all, the ones with legs!

## ITL-S

### ITL Strategic Roundtables

#### Audit Of The Future. Is There Life Beyond DAS?

**(Closed Session - to CIOs only)**

Room: Waller A/B

*Michael Connell – CLA, Middleton, WI*

Round table discussion to hear from firms that are not relying on DAAS or have now decided to move in a different direction. Are you relying on other vendors or building your own solution.

### ITL Tactical Roundtables

Room: Waller E/F

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- **Support Desk / Service:** *Jed Balido – Citrin Cooperman, New York, NY*

**Tuesday, December 6 – 3:00 – 3:15 pm (No CPE)**

## Wrap Up Sessions & Adjournment Of The ITA Fall Collaborative – GO ITA - HAPPY 25<sup>th</sup> ANNIVERSARY!

## CR

Room: Waller D

*Facilitator: Shawn P. Slavin - ITA President, Owasso, OK*

## ITL

Room: Waller E/F

*Facilitator: Lissa Johnsen - ITA Vice President, Raleigh, NC*



## NASBA Registry Information

**Credit Hours:** Up to 16 hours of CPE available. Basis: CPE credits are granted on a 50-minute hour. After the first hour, sponsors can report half-credits. **However**, half-credits are not allowed / approved in all states. If half-credits are **not** allowed, participants need to round back to the last full credit.

**Learning Objective:** Depending upon the sessions you choose to attend, you will learn best practices and hear what other industry leaders are doing with respect to: current and emerging technologies, practice and project management, staffing, marketing, and customer/client service.

**Program Content:** The program will feature tracks of educational content: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and perhaps others. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member clients or their businesses to be more successful.

**Field of Study:**

Business Management and Organization

**Level** – Update

**Prerequisites** – Minimum 3 Years as an IT Consultant or Technician

**Advance Preparation** – None

**Instructional Delivery Method** – Lecture & Discussion

**NASBA Registry of CPE Sponsors**

Information Technology Alliance (#107740) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

**Administration**

Records are maintained in accordance with CPE requirements. Questions, concerns or for more information regarding administrative policies such as complaint or refund should be made in writing to ITA Headquarters, 514 Daniels Street, Suite 361, Raleigh, NC 27605, Telephone (480) 515-2003.