Sunday, July 24	
12:30 PM - 400 PM	On Your Own Time - Local Activities
4:00 PM - 9:00 PM	Badge Pickup - Registration Desk | Grand Ballroom Foyer
5:00 PM - 9:00 PM	Opening Reception and Dinner Party | Top of the Plaza (12th Floor)

Monday, July 25		
2 TRACKS	STRATEGIC TRACK Grand Ballroom Salon A	TACTICAL TRACK Grand Ballroom Salon B
7:00 AM - 8:00 AM	Breakfast | Grand Ballroom Salon C	
8:00 AM - 8:10AM	Welcome And Agenda Review | Shawn Slavin, ITA President | Grand Ballroom Salon B	
8:10 AM - 9:30 AM	Host Firm Welcome and Executive Presentation | Grand Ballroom Salon B John Bowles, CIO and John Roberts, Chief Integration Officer - Both from FORVIS	
9:30 AM - 10:00 AM	Break	
10:00 AM - 11:30 AM	ITL Metrics Review Session	The Move To Cloud Based Security Platforms – Convenience OR Source Of Data Overload?
11:30 AM - 12:30 PM	Lunch | Grand Ballroom Salon C	
12:30 PM - 1:45 PM	The Move To Workday – Expensive? YES! Worth it? You Be The Judge	VDI - What Is The Future?
1:45 PM - 2:00 PM	Break	
2:00 PM - 3:15 PM	Mergers And Acquisitions - 'Lessons Learned'	Ugh, Another Merger?!? Best Practices and Tools For Merging Technologies
3:15 PM - 3:30 PM	Break	
3:30 PM - 4:45 PM	Strategic Roundtables	Tactical Roundtables
6:00 PM - 8:30 PM	Monday Night Dinner and Social Event | Circa 29	

Tuesday, July 26		
2 TRACKS	STRATEGIC TRACK Grand Ballroom Salon A	TACTICAL TRACK Grand Ballroom Salon B
7:30 AM - 8:30 AM	Breakfast | Grand Ballroom Salon C	
8:30 AM - 10:00 AM	"The Good Old Days" When People Breached Contracts, Not Data: Information Security Discussion & Best Practices	Taking the Stress Out of Client Due Diligence (Security) Questionnaires
10:00 AM - 10:30 AM	Break	
10:30 AM - 12:00 PM	Continuing The Evolution From Project Management To Product Management: Redefining IT Services With A Product-Orientation	Infrastructure Services Modernization - Journey To The Cloud
12:00 PM - 1:15 PM	Lunch | Grand Ballroom Salon C	
1:15 PM - 2:45 PM	Managed Services And Strategic Partners: The Good, The Bad, And The Ugly	The Wireless Only Office: Too Good To Be True?
2:45 PM - 3:00 PM	Break	
3:00 PM - 4:30 PM	Strategic Roundtables	Tactical Roundtables
4:30 PM - 4:45 PM	Closing Discussion and Adjourn | Shawn Slavin, ITA President | Grand Ballroom Salon B	
6:00 PM	Optional Meet Up For Members Staying Until Wednesday | Mellow Mushroom	

July 24-26, 2022
Renaissance Asheville Downtown Hotel
Asheville, NC

INFORMATION TECHNOLOGY ALLIANCE

Internal Tech Leaders
SUMMER MEETING

Monday, July 25

8:00 – 9:30am
Track – Combined   CPE – 80 min.
Room: Grand Salon B

Welcome and Agenda Review

Shawn Slavin – ITA President, Owasso, OK

ITA President Shawn Slavin will introduce our Summer ITL Meeting Committees and welcome everyone. He will also provide an overview of the Summer ITL Meeting agenda prior to introducing our Sunday Host Firm.

Host Firm Welcome and Executive Presentation

John Bowles (CIO) and John Roberts (Chief Integration Officer) – FORVIS

John Roberts, Chief Integration Officer of FORVIS, will provide a brief overview and history of FORVIS, the business drivers that led to the merger of BKD and DHG, and discuss the unique challenges of a merger of this size.

10:00 – 11:30am
Track – Strategic   CPE – 90 min.
Room: Grand Salon A1

ITL Metrics Review Session

Aaron Gray – CLA, Phoenix, AZ
John A. Fleischer – CBIZ, Inc., Independence, OH

Over the past few years, we have been working on revamping the financial & application metrics. In this session, we'll examine the results of this year's financial metrics reporting, discuss areas that need to be better defined and/or improved and review how the information will be collected, assembled and reported into the future. In this session, we will also examine the results of this year's application metrics reporting, discuss areas that need to be better defined and/or improved and review how the information will be collected, assembled and reported into the future.

10:00 – 11:30am
Track – Tactical   CPE – 90 min.
Room: Grand Salon B

The Move To Cloud Based Security Platforms – Convenience OR Source Of Data Overload?

Session Leader:
Chris Wallace – Elliott Davis, Greeneville, SC
Panelists:
Nick Cozzolino - The Bonadio Group, Albany, NY
Leland McAfee – Whitley Penn, Fort Worth, TX

The days of big, clunky and expensive security appliances are over. As firewalls, SIEMs, and other clunky and expensive security appliances become commoditized, security teams are more than ever focused on their cloud infrastructure. With a seemingly endless number of data streams from cloud platforms, security practitioners are often faced with data overload and struggle to generate meaningful insights. While platforms like the Microsoft 365 security suite, Crowdstrike, Darktrace, etc have made some aspects of managing the security landscape easier, their in-depth analysis of our systems have also exposed vulnerabilities that were never a concern in the past. This discussion will focus on the following:

- Changes in approach to securing systems
- Cloud security platforms
- Protecting cloud environments (Azure, AWS, etc)
- Security team staffing and supplementing security staff with MSSPs

12:30 – 1:45pm
Track – Strategic   CPE – 75 min.
Room: Grand Salon A1

The Move To Workday – Expensive? YES! Worth it? You Be The Judge

Moderator:
Jeff French – Elliott Davis, LLP, Greeneville, SC
Panelists:
Doug Anderson – Crowe LLP, South Bend, IN
Paul Blowers – Plante Moran, Southfield, MI
Aaron Gray – CLA, Phoenix, AZ

As more ITA firms move to platforms like Workday and away from more traditional siloed systems (HRIS, ERP, etc) the community is really waking up to the value in this type of transition. While on the surface, this transition might seem incredibly expensive. However, the firms that have made the transition are reporting new efficiencies and a better employee experience through native integration. This panel will focus on firms at various stages of the transition to PSA platforms, from the RFP process to the implementation.

12:30 – 1:45pm
Track – Tactical   CPE – 75 min.
Room: Grand Salon B

VDI - Does It Have A Future?

Andrew Adams – FORVIS, Hendersonville, NC
Matt Manley – Elliott Davis, LLC, Chattanooga, TN
Michael Tylicki – Cohen & Company, Cleveland, OH

Virtual Desktop Infrastructure goes by many names and has been a staple of our technology portfolios for two decades or more (ie, Citrix WinFrame on Windows NT 3.51). This technology has demonstrated some real perseverance over that time. Part of its longevity can be attributed to how it has evolved and improved over the years. As our firms grow and are faced with compliance, security, scalability, latency and global workforce challenges, this technology continues to play an important role in many of our firms. Please join us for this session where we explore how some of our firms are using this technology and their strategic thinking about the future role it may play.

2:00 – 3:15pm
Track – Strategic   CPE – 75 min.
Room: Grand Salon A1

Mergers And Acquisitions - 'Lessons Learned'

John Bowles – FORVIS, Hendersonville, NC

As a professional services firm CIO, mergers and acquisitions are something we contend with on a regular basis. Each integration effort has its own unique challenges and it seems that no matter how many of these we've done, we always learn something new with each new effort. Please join this moderated group roundtable discussion while we explore together our unique approaches to merging in other firms and the many lessons we've learned along the way.

2:00 – 3:15pm
Track – Tactical   CPE – 75 min.
Room: Grand Salon B

Ugh, Another Merger?!?
Best Practices And Tools For Merging Technologies

Sean Grieco – The Bonadio Group, Amherst, NY
John Roman, Jr. – The Bonadio Group, Pittsford, NY

The public accounting industry continues to grow revenues, capabilities, and employees through mergers and acquisitions. Seemingly simple for non-technologists, merging two firm's technologies such as Microsoft tenants, into each other is a challenge. The goals of this session are for open and honest discussion, collaboration, and information sharing related to merging two technologies into one. During the discussion participants will:
• Have the opportunity to provide insights into successfully merging technologies
• Hear from firms who have successfully merged technologies
• Learn the best practices participants have employed such as methodologies, processes, and tools.

3:30 – 4:45pm
Track – Strategic   CPE – 75 min.
Room: Grand Salon A1

Strategic Roundtables

John Bowles – FORVIS, Hendersonville, NC

Our ITL Strategic Roundtables provide an opportunity for the ITL CIOs to discuss current topics and issues with their peers. The roundtable makeup, format and topics is determined by the Summer ITL Planning leaders and will be distributed to the participants prior to the session.

3:30 – 4:45pm
Track – Tactical   CPE – 75 min.
Room: Grand Salon B

Tactical Roundtables

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

Table Leaders:

Infrastructure: Jeff Craig - Crowe LLP, South Bend, IN
Service Delivery, Metrics and Support: Kendrick Hagins – Whitley Penn, Fort Worth, TX
Security/Compliance: Chris Wallace – Elliott Davis, Greenville, SC

8:30 – 10:00am
Track – Strategic   CPE – 90 min.
Room: Grand Salon A1

"The Good Old Days" When People Breached Contracts, Not Data: Information Security Discussion & Best Practices

Moderators:

Nick Cozzolino - The Bonadio Group, Albany, NY
Leland McAfee – Whitley Penn, Fort Worth, TX

End users have been responsible for exposing data since the advent of electronic mail, spreadsheets and databases. The number of incidents and breaches continues to increase even though awareness efforts and information security investments are at an all-time high. Lead by Nick Cozzolino CISSP, CISM, Director of Information Security at the Bonadio Group, and Leland McAfee, Manager of Information Security at Whitley Penn. The goals of this session are for open discussion and information sharing related to current threats, educating end users, and information security best practices related to the "human element" of information security. During these discussions participants will:

- Hear from others on how they identify and prioritize threats and mitigation efforts
- Learn best practices for informing and training end users
- Minimizing the risks associated with end users being phished, business e-mail compromised, and/or sending unencrypted sensitive information (personal, client, firm)
- Find out where other firms are investing in information security

8:30 – 10:00am
Track – Tactical   CPE – 90 min.
Room: Grand Salon B

Taking the Stress Out of Client Due Diligence (Security) Questionnaires

Facilitator:

Mike Denno – Rehmann, Saginaw, MI

Panelists:

Nick Cozzolino - The Bonadio Group, Albany, NY
Jack Redfield - Cherry Bekaert LLP, Richmond, VA
JD Stotts – Whitley Penn, Fort Worth, TX
Kevin Yenglin – Rehmann, Saginaw, MI

Relax, Unwind, and Zen – are words that do not correlate very well when filling out a client due diligence security questionnaire. In the middle of your very busy day; BAM! Your inbox gets an urgent request to fill out a 10-page due diligence security questionnaire from a potential or existing client; not a situation one would like to meditate on.

In this session we will see how firms have constructed their due diligence processes to create a more Zen-like experience for themselves and their clients. Attendees will learn how to:

- Tactfully answer tough questions
- Create a due diligence response package
- Break down the questionnaire
- Build an internal knowledge base
- Have remediation plans in place for identified gaps
- Avoid liability pitfalls
- Utilize third party platforms

10:30am - Noon
Track – Strategic   CPE – 90 min.
Room: Grand Salon A1

Continuing The Evolution From Project Management To Product Management: Redefining IT Services With A Product-Orientation

Jeff Case – FORVIS, Springfield, MO
Joe Miles – CBIZ, Inc., Indianapolis, IN
Pat Powers – Crowe LLP, South Bend, IN
Kevin Sexton – Cohen & Company, Cleveland, OH
Nicholas Torraca – CohnReznick, Roseland, NJ

Software development teams started to adopt Agile-based methodologies over 20 years ago, resulting in the delivery of working software earlier in the software development lifecycle, which also better met the user's needs through obtaining and understanding constant user feedback and reprioritizing future feature delivery as a result. The success of this approach has ignited interest towards applying this approach to disciplines beyond just software development. This session will explore recasting the IT service leader role, who may traditionally define their role as a "Project Manager" who manages a discrete set of projects involving their team, to a "Product Owner", who aligns with business product teams and regularly reprioritizes their IT resource assignments and activities accordingly. Key learnings:

- Know the difference between Project Management versus Product Management.
- Understand key Product Management responsibilities and practices which can be adopted to managing an IT Service area (e.g., Service Desk, Systems Administration, Endpoint services, etc.) which better adapts to meet the needs of the business.

10:30am - Noon
Track – Tactical   CPE – 90 min.
Room: Grand Salon B

Infrastructure Services Modernization - Journey To The Cloud

Sean Grieco – The Bonadio Group, Amherst, NY
Jamie Simmons – Moss Adams LLP, Seattle, WA

Cloud platforms such as Azure and AWS represent enormous positive benefits to our organizations and our ability to accelerate and scale the delivery of technology services to our firms. Each of our firms are at different stages, and have taken varying paths, in their journey to the cloud. To fully realize the benefits of the cloud there is a need to modernize our approach, skillsets, teams, and processes related to infrastructure services. In this session you'll learn where peers are at in their journey to the cloud, what key lessons have been learned so far, current pain points, strategies being employed to modernize and upskill infrastructure teams, how peers are dealing with existing technical debt and the associated traditional infrastructure, governance needed, and workload migration philosophy and strategies.

1:15 – 2:45pm
Track – Strategic   CPE – 90 min.

Managed Services And Strategic Partners: The Good, The Bad, And The Ugly

John A. Fleischer – CBIZ, Inc., Independence, OH
JD Stotts – Whitley Penn, Fort Worth, TX

As our firms continue to grow, and the demands on our technology organizations grow ever faster, it is critical now more than ever that our technology resourcing and service strategies include a mixture of our own employees, managed services, and strategic partners to keep up with the increasing pace of demand. In this session you'll join your peers for a round table discussion on the lessons learned, where the low hanging fruit is, where the traps are, internal change management hurdles, and what successful strategies are looking like within the various firms.

1:15 – 2:45pm
Track – Tactical   CPE – 90 min.
Room: Grand Salon B

The Wireless Only Office: Too Good To Be True?

Moderator:
Jeff Craig - Crowe LLP, South Bend, IN
Panelists:
Ian Cooper – Crowe LLP, South Bend, IN
Chris Foote – FORVIS, Hendersonville, NC
Tom Lee – Whitley Penn, Fort Worth, TX

As the mobile workforce continues to evolve, including "hot desks" and collaboration spaces, the needs of the office network infrastructure are shifting as well. Many organizations are slowly adapting "wireless first" initiatives, reducing switching hardware and in many cases removing live wired network connections entirely.   Before making the investment in wireless-only, there are several factors to consider. Please join our panel discussion as we explore wireless implementation strategies. We'll hear from firms that have started their wireless journey and are willing to share their experiences. In this session the panel will also explore:

- The business benefits to moving to a wireless-first environment
- Capacity planning. How to ensure reliability and wireless coverage throughout all locations
- Lessons learned and Implementation challenges
- Security recommendations and best practices

3:00 – 4:30
Track – Strategic   CPE – 90 min.
Room: Grand Salon A1

Strategic Roundtables

John Bowles – FORVIS, Hendersonville, NC

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3:00 – 4:30pm
Track – Tactical   CPE – 90 min.
Room: Grand Salon B

Tactical Roundtables

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Service Delivery, Metrics and Support: Kendrick Hagins – Whitley Penn, Fort Worth, TX
Security/Compliance: Chris Wallace – Elliott Davis, Greenville, SC

4:30 – 4:45pm
Track – All
Room: Grand Salon B

Closing Discussion and Adjourn

Shawn Slavin – ITA President, Owasso, OK

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INFORMATION TECHNOLOGY ALLIANCE
Internal Tech Leaders
SUMMER MEETING

NASBA Registry Information

Credit Hours: Up to 15 Hours of CPE available.   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 three tracks of educational content: Internal IT for large CPA Firms and Technology Product, Support and Service Updates/Discussions. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member firms 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

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