April 24-26, 2022
Hilton Denver City Center, Denver, Colorado

ITA 2022 • DENVER, COLORADO

SPRING
COLLABORATIVE

ITA Mobile
Your Meeting Guide
https://eventmobi.com/itaspring2022

#ITASpring22

Sunday, April 24

2:30PM - 5:00PM	BADGE PICKUP Colorado Foyer
3:30PM - 4:30PM	MEET, GREET AND EAT (Session to meet New Members and First Timers) Colorado A/B
4:30PM - 6:00PM	ITA GENERAL SESSION Colorado E/F PRESIDENT'S WELCOME - Shawn Slavin, ITA President | KEYNOTE: NAKED NETWORKING - Kari Mirabal
6:00PM - 7:30PM	SUNDAY NIGHT WELCOME RECEPTION Colorado Foyer
7:30PM	DINNER ON YOUR OWN AND VARIOUS PARTNER EVENTS

Monday, April 25

7:00AM - 5:00PM	BADGE PICKUP Colorado Foyer
7:00AM - 8:00AM	BREAKFAST Denver
8:00AM - 9:30AM	GENERAL SESSIONS Colorado E/F ITA'S LEADERSHIP ALLIANCE (ILA) GRADUATION - Shawn Slavin, ITA President KEYNOTE: DIVERSITY IN A POST-PANDEMIC HYBRID WORKING ENVIRONMENT - Susan Davis-Ali

MONDAY WORKSHOPS	WORKSHOP 1 Colorado F	WORKSHOP 2 Colorado E	WORKSHOP 3 Colorado B-D		ITL CIO ACADEMY Penrose 1 Closed Session for ITL CIOs or Their Designee – One Per Firm
10:00PM - 12:00PM	Naked Networking MasterClass Kari Mirabal	The "Differentiated Discovery" Jeremy Potoka	Fierce Conversations: A Revolutionary Approach To Conversations That Matter Ellen Steinlein		Magnify Your Influence: Your Survival Depends Upon IT Yvonne Scott
12:00PM - 1:15PM	LUNCHEON Denver				
1:15PM - 3:15PM	Naked Networking MasterClass Kari Mirabal	The "Differentiated Discovery" Jeremy Potoka	Fierce Conversations: A Revolutionary Approach To Conversations That Matter Ellen Steinlein		Magnify Your Influence: Your Survival Depends Upon IT Yvonne Scott

TRACKS AND SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING SERVICES (CAS) TRACK Colorado G/H	Internal Tech Leaders (ITL)	
	CR TRACK 1 & COMBINED Colorado F	CR TRACK 2 Colorado E		ITL TACTICAL Penrose 2	ITL STRATEGIC Penrose 1
3:30PM - 5:00PM	The Great Resignation?	Flexible Schedule Is An Oxymoron: A Conversation About Results-Only Work Environments	CYA – Cover Your Assets: How To Structure Engagements To Protect Your Firm	ITL Tactical Roundtables	ITL Strategic Roundtable Executive Insights: Talent Management Or Talent Disaster Recovery Plan?
6:00PM - 9:00PM	RECEPTION AND DINNER PARTY Denver				

Tuesday, April 26

7:00AM - 8:00PM	BREAKFAST Denver

TRACKS AND SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING SERVICES (CAS) TRACK Colorado G/H	Internal Tech Leaders (ITL)	
	CR TRACK 1 & COMBINED Colorado F	CR TRACK 2 Colorado E		ITL TACTICAL Penrose 2	ITL STRATEGIC Penrose 1
8:00AM - 9:15AM	Implementation Success From The Lens Of The Customer	Succession Planning Helps Your Business Thrive And Survive	CAS 2.0: Afterthought To Growth Engine	Changes In On-Boarding Post-Covid	Update On The CPA.Com Digital Auditing Solution
9:30AM - 10:45AM	New Hire To Rockstar: Accelerating The Time To Value For New Employees	The Succession Saga Continues – Spoiler Alert...It Ain't All About The Numbers!	Structuring Your CAS Practice: From Startup To Maturity	Intelligent And Cognitive Automation - A Wake Up Call For Our Organizations	Create The Human-Centric Future Of Work Using Design-Thinking
11:00AM - 12:15PM	Service As A Subscription – What Must Change?	Smarketing: A Trendy Buzzword Or A Fundamental Shift In How We Should Be Selling	A What Not To Do Guide To Building A CAS Practice In A Large Firm!	Security And The Remote Workforce	Let's Crush Innovation! (As Long As We Never Disrupt Anyone In The Firm)
12:15PM - 1:30PM	LUNCHEON Denver				
1:30PM - 3:00PM	Guitars, Sausages, Vacuums, Financial Statements: A Conversation About Subscription Implementation		Who Are You?– Exploring CAS Through Definition, Communication, And Marketing	ITL Tactical Roundtables	ITL Strategic Roundtable
3:00PM - 3:15PM	CR Wrap Up Session Colorado F		CAS Wrap Up Session	ITL Wrap Up Session Penrose 2	

Wednesday, April 27

8:30AM - 3:00PM	ITA LEADERSHIP ALLIANCE (ILA) BASE CAMP (Note: Separate Registration Required) Independence

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Session Descriptions and Speakers

Consulting & Reselling - CR
Internal Technology Leader Tactical - ITL-T
Internal Technology Leader Strategic - ITL-S
Client Accounting and Advisory Services - CAS

Sunday, April 24 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)

4:30 – 4:45 pm

President's Welcome

Room: Colorado E/F

Shawn Slavin – ITA President, Owasso, OK

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

4:45 – 6:00 pm (75 CPE)

KEYNOTE: Naked Networking

Room: Colorado E/F

Kari Mirabal - WCD Enterprises, LLC – Speakers, Dallas, TX

Today's competitive business market demands results, and a powerful circle of influence can help you get there. Naked Networking®, a high energy and engaging keynote, explores five networking mistakes (and solutions) to help audiences build & sustain powerful connections plus provides strategies for how to "Network Smarter". This presentation is edgy, informative and full of case studies of proven networking practices (customized for both introvert & extrovert audience members). NAKED is an acronym for the 5 common mistakes people make when networking (Neglect, Afraid, Knowledge, Engage and Dedicate). Audiences can expect to learn strategies to help them push past fear and connect with confidence. Other Takeaways:

- Discover 5 networking mistakes (and solutions) to build powerful connections
- Learn a 3-step networking strategy
- Explore ways to overcome fear to network with confidence

Monday, April 25 – 8:00 to 9:30 am - Monday Morning General Session & Keynote (70 CPE Minutes)

8:00 – 8:20 am

ITA's Leadership Alliance (ILA) Graduation – Class of 2022

Room: Colorado E/F

Shawn Slavin – ITA President, Owasso, OK

ITA President Shawn Slavin will present the 2021-22 Class of the ITA's Leadership Alliance (ILA) with their graduation certificates.

8:20 – 9:30 am (70 CPE Minutes)

Diversity In A Post-Pandemic Hybrid Working Environment

Room: Colorado E/F

Susan Davis-Ali – President, Leadhership1, LLC, St. Paul, MN

There has always been a war for top-talent especially in the field of technology. Add in a pandemic that resulted in rapid transformation to work-from-home and hybrid work models, and that war for top-talent becomes even more complicated. In her presentation, Dr. Davis-Ali will outline specific actions leaders can take to recruit, retain, and advance diverse talent in a post-pandemic work environment. Why focus on diverse talent? The business benefits of a diverse workforce will be a key focus of this presentation as well. Think of this presentation as your Cliffs Notes on gender diversity based on the most current research and data combined with 15 years of Dr. Davis-Ali's experience coaching thousands of technical women around the world. She is eager to share her best practices with you!

Deep Dive Workshops

Monday, April 25 - 10:00 am to 3:15 pm (with lunch from Noon to 1:15) – (240 CPE Minutes)

Workshop 1

Naked Networking® MasterClass

Room: Colorado F

Kari Mirabal - WCD Enterprises, LLC – Speakers, Dallas, TX

Today's competitive business market demands results, and a powerful circle of influence can help you get there. This masterclass, based on Kari Mirabal's Naked Networking® keynote, takes a deep dive into exploring the five networking mistakes (and solutions) plus fosters an audience experience that is engaging, energetic, and shares additional real-world networking strategies. Other Take-aways:

- Discover more tips for leveraging the 5 most common Naked Networking® mistakes (Neglect Afraid, Knowledge, Engage, Dedicate)
- Includes strategies related to digital networking (LinkedIn) as well as traditional (live event) methods for building authentic connections
- Explores Top 10 LinkedIn Profile "must-haves"
- Audience participates in engaging customized exercises during masterclass

Workshop 2

The "Differentiated Discovery"

Room: Colorado E

Jeremy Potoka - Presales Leader LLC, Lancaster, PA

Proper discovery and requirements gathering sets the stage for the success of any IT initiative. Just like an architect sits down with a future homeowner to build the house of their dreams, IT professionals need a deep understanding of their internal or external stakeholder’s goals, desires and wishes that are driving change. In addition, we need to understand their fears about what might halt or slow down change. Only then can a path be designed to achieve those objectives with the application of technologies. Various frameworks exist for conducting a proper discovery to gather requirements, both presale and post-sale. However, these frameworks are too often prescribed like a checklist, making the discovery process into more of an interrogation that yields expected answers rather than meaningful dialogue about one’s overall goals for change.

Companies don’t purchase software or implement IT changes – People do on behalf of companies. In addition, the people purchasing or implementing IT have grown accustomed to curated, targeted content in their daily lives, both professionally and personally. Search engines and social media networks (like LinkedIn) suggest and serve up content that is personalized, inherently raising the expectations for B2B interactions offline. The case is now stronger than ever for an individualized or “differentiated discovery”. The goal of this workshop is to make the discovery process a more human experience. We’ll cover the following:

- Revisit the prerequisites and goals for a successful discovery
- What is a “differentiated discovery”?
- Best practices for a collaborative discovery process with various internal and external stakeholders
- Discovery Do’s and Don’ts
- Review several tools that can be applied in real-life work situations

Workshop 3

Fierce Conversations: A Revolutionary Approach To Conversations That Matter

Room: Colorado B-D

Ellen Steinlein – Master Facilitator, Fierce, Inc., Colorado Springs CO

Fierce Conversations is a global leadership training company that transforms the way people communicate with each other. We help companies discover how they can solve for:

- Pointless conversations that lead to confused priorities
- Disengaged or under-performing employees
- Workplace conflict that impacts productivity, morale, and retention

At Fierce we know that *what gets talked about, how it gets talked about, and who is invited to the conversation, determines what will happen, and what won't!* We also know that when you avoid a tough conversation, you pay a high price. When negative behaviors and attitudes go unaddressed, they tend to become the norm. **As business leaders and entrepreneurs, you can't afford another pointless, missed, or failed conversation.**

This Fierce Conversations workshop begins with Fierce Foundations, by introducing 3 transformational ideas that will undo old assumptions, spark new insights, and lay the groundwork for shifting how you view everyday conversations. We'll then spend the second half of our time in Fierce Confrontation, which teaches leaders an effective conversation model designed to address attitudinal, behavioral or performance issues while enriching the relationship.

In this two-part workshop, you'll learn:

- The 7 core principles of Fierce Conversations and how to apply them immediately
- The steep costs of avoiding uncomfortable conversations
- Your most valuable currency (spoiler alert: it's not money)
- How to confront an issue — rather than an individual
- 5 common confrontation pitfalls to avoid
- How to tee up any confrontation in 60 seconds or less

Workshop 4

(Closed Session for ITL CIOs or Their Designee – One Per Firm)

CIO Academy - Magnify Your Influence: Your Survival Depends Upon IT

Room: Penrose 1

Yvonne Scott – Founder, CIO Concierge, LLC, Cave Creek, AZ

You are an expert in your field. You've made it to the C-suite. You're a part of the executive leadership team. You are the CIO. Great seat, or hot-seat?

There is not another seat in the C-suite that spends more time navigating around obstacles from both within and outside the organization. Colleagues do not hesitate to create stand-alone technology, your board worries you are not doing enough to keep the firm competitive and the press often questions the very existence of your role. All this while digital disruption is accelerating, technology adoption is struggling, talent is hard to attract and retain and the demands for demonstrable technology returns are increasing. All heads are, or should be, turning to you to define and deliver the Next Normal for your team, your firm and your clients. Are you ready?

This session focuses on identifying and delivering the building blocks to allow you to:

- Accelerate and amplify the impact technology has on business results
- Enrich the experience people have with technology
- Increase the leverage and scale achievable by human capital
- Enhance your personal brand and professional experience

We will discuss what organizations need now, and in the near future, and how to position your team as leaders and orchestrators to navigate those needs. We will make it actionable by exploring specific approaches, techniques, frameworks and tools to help you develop or improve:

- Organizational and professional influence
- Strategy development and communication
- Digital foundations for the firm of the future
- Shared technology leadership and governance
- Technology adoption and digital dexterity

Concurrent Sessions – By Date and Time

Monday, April 25 – 3:30 to 5:00 pm - (90 CPE Minutes)

CR-1

The Great Resignation?

Room: Colorado F

Moderator:

Theresa Putzier – Celigo, Roseville, MN

Panelists:

Alan Clark - Eide Bailly LLP, Salt Lake City, UT

Nancy Teixeira – Sage, Lawrenceville, VA

Well over 20 million people quit their jobs in the second half of 2021. Some are calling it the "big quit," others the "great resignation." Are employees really leaving the workforce or are they just seeking a better balance? This hybrid panel discussion will discuss how commitment to building an empowering company culture has helped them minimize the impact on The Great Resignation altogether and provide new and interesting perks for their employees as they continue to thrive during one of the toughest times in recent history.

CR-2

Flexible Schedule Is An Oxymoron: A Conversation About Results-Only Work Environments

Room: Colorado E

Wendy Gorrie – Net at Work, NY, NY

Ed Kless – Sage, Allen, TZ

In 2008 Jody Thompson and Cali Ressler introduce the concept of the result-only work environment (ROWE) in their book “Why Work Sucks and How to Fix It”. In March 2020, the professional firms were suddenly forced to switch to a ROWE in a manner of weeks. Sadly, many firms now are undoing the process under the guise of “returning to the office.” Why? The model is better for managers and team members alike, but fully implementing it requires all of us to think differently that we have in the past. This session is an invitation to participate in an open conversation with other ITA members led by Wendy Gorrie of Net at Work.
Objectives:

- Distinguish a ROWE from not-a-ROWE
- Eliminate sludge
- Free yourself of managing people (you can’t anyway so stop trying)

CAS

CYA – Cover Your Assets: How To Structure Engagements To Protect Your Firm

Room: Colorado G/H

Moderator:

Irfan Dossani – Whitley Penn, Dallas, TX

Panelists:

Nina Chmura – WithumSmith+Brown, Brunswick, NJ

Michael Glynn – AICPA, NY, NY

Erin Hutton - Elliott Davis, LLC, Greenville, SC

John Yeager - Bennett Trasher, Atlanta, GA

Big firms – Big problems. Have you been struggling to find a risk blueprint that works for scaling your practice and don’t know where to start? During this session, you will hear an expert explain the AICPA guidelines that CAS practices must consider and we will have a panel discussion with firm leaders on how to practically implement the standards within your practice. Firm leaders will share their best practices for balancing growth, standardization, and risk. During this session, you’ll learn:

- What “customer ownership” really means and how to structure engagements so that it’s clear to the customer and to your firm’s risk management team.
- How to structure a Virtual Controller and Virtual CFO role.
- What should be considered when making software recommendations and subsequent implementation for customers.
- Areas to consider when attempting to limit risk and include the right language in the engagement letter that protects the firm.

ITL-T

ITL Tactical Roundtables

Room: Penrose 2

The ever-popular ITL Tactical Roundtables for this Spring 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!

- **Infrastructure/Engineering:** *Amel Edmond - WithumSmith+Brown, Red Bank, NJ* ***AND*** *Terran LaMonda - WithumSmith+Brown, Bethesda,MD*
- **Application Development:** *Mike Simpson – Aprio, Atlanta, GA*
- **Project Management:** *Troy Heinzman and Cheney Pridgen – Aprio, Atlanta, GA*
- **Security/Compliance:** *Bruce Humphrey – Aprio, Atlanta, GA* ***AND*** *Terran LaMonda - WithumSmith+Brown, Bethesda,MD*
- **Support Desk / Service:** *Mark Zankowski - Aprio, Atlanta, GA*

ITL-S

ITL Strategic Roundtable

Executive Insights: Talent Management Or Talent Disaster Recovery Plan?

Room: Penrose 1

J. D. Stotts - Whitley Penn, Fort Worth, TX

Most firms are experiencing a talent crunch especially in assurance and tax practice areas – for many reasons. And, most technology and security teams are facing talent issues as well. If we as technology leaders are not serious and innovative about talent management across our teams, then we will be faced with regular "disaster recovery" episodes for talent. We do have a choice. So, let's share some of our current challenges in finding, retaining, coaching, growing and promoting talent in these topsy turvy times and our ideas on how to manage more intelligently. Having the right people on the bus, in the right seats, at the right time, doing the right thing is more critical than ever to keep up with disruption in professional services.

Tuesday, April 26 – 8:00 to 9:15 am - (75 CPE Minutes)

CR-1

Implementation Success From The Lens Of The Customer

Room: Colorado F

Robert Gaby - RKL eSolutions LLC, Simi Valley CA
Phil Sim – Blytheco, Irvine, CA
Shawn C. Windle – ERP Advisors Group, Lakewood, CO

We all desire to have perfect projects that are stress-free and transformative to our customers. We go into engagements with our knowledge and expertise, and assumptions about our clients and what is important to them. What if we could get additional insights on what customers desire, from their perspective? In this session, we will have Shawn Windle, from ERP Advisors Group, Software Selection Firms in Colorado, his organization also leads and manages implementations, serving as a business analyst and project manager on the customer's behalf. In the presentation, you will learn the following:

- How clients actually view ERP projects - FUD and then some.
- Tools for assessing risk of clients not performing their tasks on the project and potential mitigations - measuring client tolerance for taking on more work.
- How most clients measure success - it may not be what you think.

CR-2

Succession Planning Helps Your Business Thrive And Survive

Room: Colorado E

Tom Falloon - Cargas Systems, Inc., Lancaster PA
Annette Manias - Oasis Solutions Group, Louisville, KY

There are A LOT of considerations in choosing a succession plan. Join us for this thought-provoking session to hear a couple of your peers' experience. We will have presentations sharing an insider's perspective and the actual paths taken.

CAS

CAS 2.0: Afterthought To Growth Engine

Room: Colorado G/H

Jim French – IFI Professionals, Laguna Nigel, CA
Kalil Merhib – CPA.com / AICPA, NY, NY
John Yeager - Bennett Trasher, Atlanta, GA

How do we move from a financial CAS practice to an insight-based practice. How do you measure success? What KPI's should we be tracking to manage a top producing practice? How to address conflicts of interest with other areas of the practice?

ITL-T

Changes In On-Boarding Post-Covid

Room: Penrose 2

Danielle Gallo – CohnReznick, Roseland, NJ
Brad Place – LBMC, PC, Brentwood, TN
Mark Zankowski - Aprio, Atlanta

How has your on-boarding changed post-COVID explosion? (Training, deployment, etc.)?

ITL-S

Update On The CPA.Com Digital Auditing Solution

Room: Penrose 1

James Bourke - WithumSmith+Brown, Red Bank NJ

Tuesday, April 26 – 9:30 to 10:45 am - (75 CPE Minutes)

CR-1

New Hire To Rockstar: Accelerating The Time To Value For New Employees

Room: Colorado F

Greg Castro – Nodus, A Division of EVO, Denver, CO.
Julian Schrenzel - DyNexus Recruiting & Staffing, Seattle, WA
Lori Seal – Blytheco, Laguna Hills, CA
Christi Whipple – Avalara, Irvine, CA

Losing an employee can be painful, especially when you think about all the time and resources you invest before they begin producing results. Plenty of organizations try to minimize the impact by focusing on employee retention initiatives, but there are many cases where turnover is actually a positive thing – like internal promotions or losing an employee who really wasn't a fit for the role. So, rather than exclusively investing in retention measures, it's important to consider ways you can shorten the time it takes for a new employee to begin adding value. In this session, you'll hear from business leaders about the techniques they've been able to successfully employ to accelerate and improve on-boarding processes. You will work together in small groups to share ideas and ultimately come away with a plan you can take back and implement for your business.

CR-2

The Succession Saga Continues – Spoiler Alert…It Ain't All About The Numbers!

Room: Colorado E

Moderator:
Stacy Schuettler - LBMC Technology Solutions, Knoxville, TN
Panelists:
Kayley Bell – DSD Business Systems, San Diego, CA
Annette Manias - Oasis Solutions Group, Louisville, KY
Phil Sim – Blytheco, Irvine, CA

If you are an owner or equity partner looking to exit your company, there is more to the story of succession execution than just the purchase price. Sure, you are concerned about the valuation and leadership capabilities of the purchasers but have you ever thought about "what's next for me after all the deal closes"? Do you stay working in the business or do you exit right away? What does that look like and how do you navigate through that with the new owners. And while it might be hard to believe, there are others to think about during the transition. The new owners, whether another company or your own employees, have their own objectives, concerns, and fears. Come to this session to hear from your peers who have gone through this transition or are currently going through their succession transition. In addition, hear from THE OTHER SIDE and learn from the purchasers' perspective the things that need to be considered, communicated, and decided. Key take aways include:

Gaining a better understanding of all of the variables of selling your business.
Learning what should be discussed and decided and included in the deal structure before the contract is inked.
Increasing your awareness of the non-financial aspects that the purchaser is most interested in and concerned about.

CAS

Structuring Your CAS Practice: From Startup To Maturity

Room: Colorado G/H

Irfan Dossani – Whitley Penn, Dallas, TX
Rebecca Munson – Lurie LLP, Minneapolis, MN

Structuring your CAS team can be a complex process, affected by capital, scale or industries serviced. Most practice leaders wonder what the best process is for setting up their team, how to plan now for future success, and when to add additional talent. In this session we will:

- Discuss the most common CAS Practice team structures, from startup to growth.
- Spend time in group discussion on the merits of each team structure, as well as lessons learned in using each one.
- Discuss best use of specialized teams such as implementation, client service, onboarding, etc.
- Share best practices for job titles and writing job descriptions

ITL – T

Intelligent And Cognitive Automation - A Wake Up Call For Our Organizations

Room: Penrose 2

John Cottongim – Roots Automation, NY, NY
Mo Galal – Aprio, Atlanta, GA
Johnny Ramondino – INVOKE, Inc., Atlanta, GA
Curtis Shelton – CBIZ, Inc. Cleveland, OH

In this session we will cover the who, what, where, when and why of next generation automation. What are the advantages of intelligent automation over legacy automation? How can your organization benefit from intelligent automation? What does the future of automation look like?

ITL – S

Create The Human-Centric Future Of Work Using Design-Thinking

Room: Penrose 1

Brad Place – LBMC, PC, Brentwood, TN

Design Thinking as a model for solving problems has been around for many years. With the dramatic changes to work brought about by the Pandemic and other factors, is it time to use Design Thinking to improve what the future of work will look like for our teams? In this session we'll explore the basic building blocks of Design Thinking and how to apply them toward improving employee experiences and boost productivity.

- In the world of constant innovation and automation, have we forgotten the most important asset of teams – people?
- How can we use Design Thinking to reorganize our processes based on the new realities of our hybrid work environments?
- Learn how to use the five steps in Design Thinking (Empathy, Define, Ideate, Prototype, and Test) to enhance your future organization.

Tuesday, April 26 – 11:00 am to 12:15 pm - (75 CPE Minutes)

CR-1

Service As A Subscription – What Must Change?

Room: Colorado F

Patrick Connally – Microsoft, Redmond, WA
Robert Gaby - RKL eSolutions LLC, Simi Valley CA

Now that you have adopted the Service as a Subscription model are there adjustments needed to your Account Management and Service Delivery models. This session will be a facilitated group discussion including time with your peers to explore:

- What must change with Account Management? Is the conversation different? Are new skills required? Does the cadence for communication change?
- How is the implementation impacted? Is the implementation timeline shortened, lengthened or remain unchanged? Is the implementation more likely to be delivered in phases? What is the impact on project management?
- What is required to managing post go-live services? Who is responsible - must you staff differently? How do you prioritize customer requests to ensure timely response and high customer satisfaction?
- What else must change to ensure renewals?

This session is a must attend for any firm who has moved or is considering a move to a Service as a Subscription model to understand and learn what must change in your service delivery and account management processes.

CR-2Me

Smarketing: A Trendy Buzzword Or A Fundamental Shift In How We Should Be Selling

Room: Colorado E

Mary Jo Mahood - e2b teknologies, Inc., Mentor, OH
Stacy Schuettler - LBMC Technology Solutions, Knoxville, TN

This will not be your run of the mill marketing and sales method
ology or technique session! We all agree that buyer behavior has changed dramatically over the years yet most of our sales and marketing teams are still organized and compensated as they have been for decades. Check "the old way" thoughts at the door and join us for what will certainly be a lively discussion on how reinventing and aligning your sales and marketing teams can meet your growth goals with more predictability. We don't know of anyone who has it all figured out so come prepared to think differently, share your innovative ideas, and help us all get better. Our goal is that you will leave with questioning if you should be challenging the status quo and learn:

- Is it time for sales and marketing teams to come together as one team? If so, what does that look like?
- What the appropriate marketing KPIs that truly matter are and how to measure them.
- New and innovative ways to compensate the marketing team to ensure more predictable opportunity creation, not just leads.
- What percentage of inbound marketing opportunity creation should be expected from the marketing team.

CAS

A What Not To Do Guide To Building A CAS Practice In A Large Firm!

Room: Colorado G/H

Jenni Huotari – Eide Bailly LLP, Fargo, ND

Kane Polakoff - UHY Advisors, MI, Inc., Farmington, MI

Creating, Building and Maintaining a CAS Practice are not for the weary! Our session will prepare you to anticipate and respond to the challenges you may face of Launching, Building and Maintaining a successful CAS practice. In this collaborative session, we'll encourage the audience to share the lessons they've learned along their journeys on the following topics:

- Creating a CAS Practice
  - Interactions and the vision with Firm leadership
  - Internal marketing & education
- Building the CAS Practice
  - People, Process and Technology – what comes first?
  - Industry specializations- what to choose and what to decline
  - Standardizing processes (yes, that means everyone)
  - What roles do you need to scale? Best practices in onboarding
- Maintaining the Practice
  - Spending time ON the practice and not just IN the practice
  - Derailing the distractors with a large firm.

ITL-T

Security And The Remote Workforce

Room: Penrose 2

Moderator:

Amel Edmond - WithumSmith+Brown, Red Bank, NJ ***AND*** Terran LaMonda - *WithumSmith+Brown, Bethesda,MD*

Panelists:

Terran LaMonda - WithumSmith+Brown, Bethesda,MD

How has the explosion of Remote Work impacted your security configuration. What changes have you had to make to adapt to distributed access and workers?

ITL-S

Let's Crush Innovation! (As Long As We Never Disrupt Anyone In The Firm)

Room: Penrose 1

Moderator:

Dan Mallory – Aprio, Atlanta, GA

Panelists:

Jim Dunham – IRIS Star Americas, Boston, MA

Solon Angel – MindBridge, Ottawa, Canada

We heard on the last Innovation update that little true "innovation" is occurring within accounting firms. Sure, optimization is everywhere but we have a growing realization that internal structures may not always facilitate the necessary disruption. Let's explore this challenge from an outside perspective and think through how we might alter strategy. What is the recipe other industries have gone through that might paint a picture of where this is headed? Join an open discussion focusing on perspectives from a Private Equity / Venture Capital lens (among others) exploring where our industry could be heading and creative ways we might accelerate getting there!

Tuesday, April 26 – 1:30 – 3:00 pm - (90 CPE Minutes)

CR-ALL

Guitars, Sausages, Vacuums, Financial Statements: A Conversation About Subscription Implementation

Room: Colorado F

Ed Kless – Sage, Allen, TX

Guitars, sausages, vacuums, financial statements all have one thing in common – They are now available by subscription. The marketplace continues to move toward subscription-based pricing for well, everything. Implementations of accounting software are no exception. The model is better for Customers and Partners alike, but implementing it requires all of us to think differently that we have in the past. This session is an invitation to participate in an open conversation with other ITA members led by Ed Kless of Sage.

CAS

Who Are You?– Exploring CAS Through Definition, Communication, And Marketing

Room: Colorado G/H

Deneen Dias – Botkeeper, Boston, MA

Rebecca Kelley – Plante Moran, Denver, CO

In this session participants will:

- Explore the identity of and define your CAS practice - current state, gaps/inconsistencies, and future state.
- Learn how to talk about CAS to 3 different decision makers - leadership, your team, your clients/prospects.
- Identify opportunities to engage others and harness the power of testimonials through:
  - Worksheet exercises throughout
  - Shared experiences
  - Examples of marketing techniques

ITL-T

ITL Tactical Roundtables

Room: Penrose 2

The ever-popular ITL Tactical Roundtables for this Spring 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!

- **Infrastructure/Engineering:** *Amel Edmond - WithumSmith+Brown, Red Bank, NJ* ***AND*** *Terran LaMonda - WithumSmith+Brown, Bethesda,MD*
- **Application Development:** *Mike Simpson – Aprio, Atlanta, GA*
- **Project Management:** *Troy Heinzman and Cheney Pridgen – Aprio, Atlanta, GA*
- **Security/Compliance***:* *Bruce Humphrey – Aprio, Atlanta, GA*
- **Support Desk / Service***:* *Mark Zankowski - Aprio, Atlanta, GA*

ITL-S

ITL Strategic Roundtables – Update on Innovation

Room: Penrose 1

Dan Mallory – Aprio, Atlanta, GA

Topics for Roundtable Discussion:

- Designing a WVD environment
- Securing remote users (State side vs International)

Tuesday, April 26 – 3:00 to 3:15 pm

Wrap Up Sessions & Adjournment Of The ITA Fall Collaborative

CR
Room: Colorado F
Facilitator: *Shawn P. Slavin - ITA President, Owasso, OK*

CAS
Room: Colorado G/H
Facilitator: *Kim Austin – Intuit, Palm Springs, CA*

ITL
Room: Penrose 2
Facilitator: *Lissa Johnsen - ITA Vice President, Raleigh, NC*

ITA 2022 • DENVER, COLORADO
SPRING COLLABORATIVE
April 24-26, 2022
Hilton Denver City Center

NASBA Registry Information

Credit Hours: Up to 15 or 15.5 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

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