



November 3-5, 2019

Hyatt Regency San Antonio Riverwalk, San Antonio, TX



ITA Mobile  
Your Meeting Guide  
https://eventmobi.com/itafall2019



**Sunday, November 3**

7:00AM - 1:30PM	Optional Social Events
2:30PM - 7:30PM	Badge Pickup <b>Regency Ballroom Foyer</b>
3:30PM - 4:30PM	Meet, Greet & Eat Session <b>Live Oak Room</b>
4:30PM - 6:00PM	<b>ITA OPENING GENERAL SESSION Regency Ballroom</b> President's Welcome - <b>Shawn Slavin</b> , ITA President <b>KEYNOTE SESSION - Why Creativity Is The New Power - Shed Simove</b>
6:00PM - 7:30PM	Welcome Reception <b>Q Bar Lobby Level</b>
7:30PM	Dinner On Your Own and Various Partner Events

**Monday, November 4**

7:00AM - 8:00AM	Breakfast <b>Rio Grande Ballroom</b>
7:00AM - 5:00PM	Badge Pickup <b>Regency Ballroom Foyer</b>
8:00AM - 10:00AM	<b>MONDAY OPENING SESSION Regency Ballroom</b> President's State of the Association - <b>Shawn Slavin</b> , ITA President <b>KEYNOTE SESSION - How To Innovate In A Rapidly Changing World - Byron Reese</b> Retirement Presentation for <b>Stan Mark</b>

TRACKS AND SESSIONS	Consulting & Reselling (CR)		Special Interest Groups (SIGs) Pecan	Internal Tech Leaders (ITL)	
	CR Track 1 Regency West	CR Track 2 Regency Center		ITL Strategic Live Oak	ITL Tactical Regency East 1-2
10:30AM - 12:00PM	How To Successfully Implement A Services As A Subscription (SaaS) Model Into Your Consulting Practice	Transforming Businesses In The Digital Age With AI	Young Leader SIG How Valuable Is Your Time? Taking Inventory On How You Spend Your Hard-Earned Minutes	Above The Cloud Regency East 1-2	
12:00PM - 1:15PM	Luncheon <b>Rio Grande Ballroom</b>				
1:15PM - 2:45PM	Improving Your Ability to Have Crucial Conversations	Get Your Head In The Cloud: See Leading Cloud ERP Solutions In-Action	OPEN	Metrics Review - 2019 Report	Getting Business / Practice-Based Engagement In DevOps Projects
3:00PM - 4:15PM	Roundtables - Let's Continue The Conversation Regency West		Alliance, Affinity And CTP Partner Annual Forum	ITL Strategic Roundtables Managing Growth	ITL Tactical Roundtables
4:30PM - 5:30PM	ITA IGNITE <b>Regency Center</b>				
6:30PM - 9:00PM	RECEPTION AND DINNER PARTY <b>Rio Grande Ballroom</b>				

**Tuesday, November 5**

TRACKS AND SESSIONS	Consulting & Reselling (CR)		Special Interest Groups (SIGs) Pecan	Internal Tech Leaders (ITL)	
	CR Track 1 Regency West	CR Track 2 Regency Center		ITL Strategic Live Oak	ITL Tactical Regency East 1-2
8:00AM - 9:15AM	You Can't Manage What You Don't Measure: Measuring The Maturity Of Your Professional Services Organization To Drive Growth And Profitability	The Customer Journey: Developing An Extraordinary Experience	ITL Technology Innovation SIG	How I Learned to Stop Worrying and Love the Cloud – Governance and Change Management in the Era of Cloud Applications	Next Generation Networking Technologies
9:30AM - 10:45AM	Stop The Project Madness! Achieve More With Smartsheet	The Customer Journey: Developing an Extraordinary Experience Continued	ILA SIG Making Accountability A Core Strength	What To Do When a Cloud Goes From Fluffy To Ominous: Managing Risk In The Cloud	Microsoft Teams Governance Models And Real-World Experiences
11:00AM - 12:15PM	Employee Retention: Why Retaining Employees Isn't Always The Goal	Play Chess Not Checkers With Your Account Management Team	OPEN	Unified Communications 2.0	Making Changes To Manage Changes To Make Changes
12:15PM - 1:30PM	Lunch <b>Rio Grande Ballroom</b>				
1:30PM - 3:00PM	Roundtables - Let's Continue the Conversation Regency West		OPEN	ITL Strategic Roundtables	ITL Tactical Roundtables
3:00PM - 3:15PM	CR Wrap Up Session and Conference Adjourn Regency West			ITL Wrap Up Session and Conference Adjourn Regency East 1-2	

**Wednesday, November 6**

8:30AM - 3:00PM	<b>ITA Leadership Alliance (ILA) Base Camp - Class of 2019-20 Rio Grande Center</b> <i>Note: Session is NOT part of the ITA Collaborative. This is the ILA Group.</i>
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## Session Descriptions and Speakers

Consulting & Reselling – CR

Technology Innovation - TI

ITA Leadership Alliance Alumni SIG – ILA

Internal Technology Leader Tactical – ITL-T

Internal Technology Leader Strategic – ITL-S

Young Leaders SIG - YL

### Sunday, November 3 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (80 CPE Minutes)

4:30 – 4:45 pm

#### President's Welcome

Room: Regency Ballroom

*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.

4:50 – 6:00 pm (70 CPE)

#### KEYNOTE: Why Creativity Is The New Power

Room: Regency Ballroom

*Shed Simove – Ideas Man*

According to Shed Simove, knowledge is dead and creativity is the new way to success. Harnessing a constant stream of ideas from his astonishingly active mind, Shed has learned to transform his unconventional concepts into lucrative and original business ventures, which form the basis of his completely unique books, products, performances and motivational speeches. In our Sunday night keynote, Shed will present the techniques he's learned that will directly improve your bottom line and increase your success.

### Monday, November 4 – 8:00 – 10:15 am - Monday Morning General Session & Keynote (105 CPE Minutes)

8:00 – 8:30 am

#### President's State Of The Association Discussion

Room: Regency Ballroom

*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 – 9:45 am (75 CPE Minutes)**

**KEYNOTE: How To Innovate In A Rapidly Changing World**

**Room: Regency Ballroom**

*Byron Reese - Entrepreneur - Futurist - Technologist*

No matter what industry you are in, you probably have a sense that you are in one of those radical disruptive periods where everything seems to be changing. You might be wondering when it is all going to settle down so you can take a bit of a breather. With 25 years as a successful tech entrepreneur, with multiple IPOs and exits along the way, Byron Reese is uniquely suited to comment on the transformative effect of technology on the workplace and on society at large. In his keynote Byron will explore how businesses that operate in industries that are undergoing dramatic changes can function and be successful. While traditional futurists seldom bridge the gap between “here is what is going to happen” and “here is how you profit from it,” Byron explores how it is that radical technology advance creates new multi-billion dollar companies and destroys old ones.

**9:45 - 10:15 am**

**Retirement Presentation for Stan Mork**

**Room: Regency Ballroom**

*Lissa Johnsen – ITA Vice President, Raleigh, NC*

*Stan Mork - ITA Immediate Past President, Northfield, MI*

**Panelists:**

*April Blankenship – Altec, Laguna Hills, CA*

*Yvonne Scott – Crowe LLP – Oak Brook, IL*

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

*Allen Smith – Baker Tilly, Madison*

Join this session to help celebrate the retirement of ITA Immediate Past President Stan Mork.

## Concurrent Sessions – By Date and Time

**Monday, November 4 - 10:30 am 12:00 pm – (90 CPE Minutes)**

**CR-1**

**How To Successfully Implement A Services As A Subscription (Saas) Model Into Your Consulting Practice**

**Room: Regency West**

**Facilitators:**

*Aaron Rosenberg - Oasis Solutions Group, Louisville, KY*

*Jim Rosenberg - NEO3, LLC, Canfield, OH*

**Panelists:**

*Gary C. Crouch – CS3 Technology, Tulsa, OK*

*Igal Rabinovich – Net at Work, NY, NY*

Like it or not, we’re living in a subscription economy. From subscription medical services to food, clothes, even razors and of course ... software. In this session we will learn from your colleagues on the steps they’ve taken and the battles they’ve won and lost while changing their services model from time and materials to services as a subscription. Learn the first, second, third steps they took in order to get their team and shareholders on board and take the plunge to a subscription model? What would they have done differently? How did this change affect compensation and bonus structures? Did they lose any personnel due to the change? How did the change affect client satisfaction? Did they have to fire any clients because of the change in pricing model? How’s it affected cash flow and the value of their business? What exclusions, if any, did they determine to leave out of their subscription services offering?

## CR-2

### Transforming Businesses In The Digital Age With AI

Room: Regency Center

*Matt Shanahan – Lockstep Network, Inc., Seattle, WA*

Technology continues to revolutionize how we work; those who ignore this fact do so at their own peril. To remain successful, business professionals must stay on top of technology trends, implement the best solutions, and seize opportunities as they appear. Let's learn together how AI is transforming businesses through the adoption of AI within ERP and accounting software. Learning objectives:

- Demystify the subject and provide strategic insight
- Learn how AI is changing businesses and how you might be able to apply this concept to help your clients

## YL

### Young Leaders SIG

#### How Valuable Is Your Time? Taking Inventory On How You Spend Your Hard-Earned Minutes

Room: Pecan

*Kimberly Austin – Intuit, Irvine, CA*

*Darcy Boerio – DAB Partners, Brandon, FL*

*Christi Whipple – Avalara, Irvine, CA*

They say "Time is Money", yet ironically, many of us don't budget our time nearly as well as we do our dollars. Do your clients see value in the most time-consuming/ effort intensive tasks? How about meetings – we can all relate to that feeling of having a meeting about a meeting, right? The ITA Young Leaders Special Interest Group will lead an interactive session\* featuring two exercises designed to get you thinking critically about how to make the biggest impact with the time you spend, while also creating and cultivating the most productive atmosphere possible. You'll be sure to take away strategies for maximizing the value of various meetings, gain insight into where you can reduce unnecessary time-draining tasks, and even learn ways of improving the perceived value of your efforts to your clients.

\* If you join us for this session, please bring your work calendar with you

## ITL ALL

### Above The Cloud

Room: Regency East 1-2

**Facilitator:**

*Mark Isenbarger – Crowe LLP, Indianapolis, IN*

**Panelists:**

*Chris Fitzmaurice – Rehmann, Saginaw, MI*

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

*Paul O'Brien – Marcum LLP, NY, NY*

*Allen Smith – Baker Tilly, Madison*

Eric Schmidt introduced the term, Cloud Computing, on August 9, 2006 to describe the new paradigm in which people are increasingly accessing software, computer power, and files over the web instead of on their desktops. This session will discuss challenges during and after migrations, how the Cloud has changed current operations (positive and negative) and what the you wished you would have known before moving to the Cloud.

## **CR-1**

### **Improving Your Ability To Have Crucial Conversations**

**Room: Regency West**

*Julie Lubetkin – Avalara, San Francisco, CA*

Avoiding conflict with co-workers, direct reports, or leadership is a common phenomenon, but it's also very costly. Running away from tough conversations means sacrificing productivity, innovation, employee satisfaction and much more. In this interactive session, you'll learn what it takes to be able to have these crucial conversations and make them productive. We'll talk about:

- Why some conversations are so challenging but also often the most important to get right
- Tips to improve your crucial conversations
- Real life examples that help you improve your skills
- Group discussions and activities to put it into practice

## **CR-2**

### **Get Your Head In The Cloud: See Leading Cloud ERP Solutions In-Action**

**Room: Regency Center**

**Facilitators:**

*Walter Goodfield – RKL eSolutions LLC, Lancaster PA*

*Jim Rosenberg - NEO3, LLC, Canfield, OH*

**Panelists:**

*Representatives from Acumatica, Intacct and NetSuite*

Join us as we enjoy scripted demonstrations of key features of the leading Cloud ERP solutions in an action-packed shoot-out format. During this session, we will:

- Learn about the key high-level features of leading cloud ERP Solutions.
- Get to see first-hand the user-interface of each product.
- Identify WOW features of each product.
- Get a flavor of what your competition is offering.
- Hear how a partnership with each publisher could be of value to your organization.

## **ITL-S**

### **Metrics Review - 2019 Report Out**

**Room: Live Oak**

*Paul Blowers – Plante Moran, Southfield, MI*

*Aaron Gray – CLA, Phoenix, AZ*

Join us for a report out from our 2019 ITA financial and application metrics process. We've put the final touches on our metrics 2.0 tools and we are excited to share final results and insights. In this 90 minute session, we will cover the following topics:

- Recap on ITA Metrics 2019
- Key insights from analyzing the data
- Discuss process and tool improvements for 2020

## ITL-T

### Getting Business / Practice-Based Engagement In DevOps Projects

Room: Regency East 1-2

#### Moderators:

*Kevin Fraase – Eide Bailly LLC, Fargo, ND*

*Pallavi Saxena – CBIZ, Inc., Independence OH*

#### Panelists:

*Fernando Bernal – Rehmann, Saginaw, MI*

*Christine Flott – LBMC, PC, Brentwood, TN*

*Curtis Shelton – CBIZ, Inc., Cleveland, OHG*

*Jeff Case – BKD, LLP, Springfield, MO*

In this ever-changing world business need to keep innovating to thrive. The speed at which you can change your software is the speed at which your business can innovate. High-performing organizations deploy 200x more frequently, recover 24x faster from failures, have 2,555x shorter lead times and 3x lower change failure rates than low-performing ones. Business and IT need to synergize for transformation of both culture and approach for development. In this session we will have an interactive panel discussion of ITA members (Project Managers) to discuss the challenges they face when it comes to business involvement and strategies to get business more involved and invested in DevOps.

**Monday, November 4 – 3:00 – 4:15 pm – (75 CPE Minutes)**

## CR-ALL

### Roundtables - Let's Continue The Conversation

Room: Regency West

*Jonathan Morgan – Vertex, King of Prussia, PA*

Join your fellow consulting & reselling partners, ERP vendors, ISV members in individual roundtables to discuss some of the topics that were covered in today's sessions.

- Share more ideas from the session you attended. If you wanted to attend a session, but were in another, attend a roundtable to learn more about what was discussed.
- Identify one idea, or service that could be implemented in your practice.

Table 1: Successfully Implement A Services As A Subscription (Saas) Model

Table 2: Sage Intacct

Table 3: Transforming Business with AI

Table 4: Oracle NetSuite

Table 5: Crucial Conversations

Table 6: Acumatica

### Alliance, Affinity and CTP Partner Annual Forum

Room: Pecan

*April Blankenship – Altec, Laguna Hills, CA*

*Lissa Johnsen – ITA Vice President, Raleigh, NC*

Once a year we gather our Alliance, CTP and Affinity Partners in a private session to allow the ITA Board, Vice President and President to provide an update on some of the key ITA initiatives and to get your feedback on what the ITA can do to continue to provide value to your membership. Come and learn more about the key strategic priorities of the ITA so that you can get involved in helping to implement them.



## ITL-S

### ITL Strategic Roundtables - Managing Growth

Room: Live Oak

*Mike Denno – Rehmann, Saginaw, MI*

*Allen Smith – Baker Tilley, Madison, WI*

The focus of this session will be Managing Growth - The challenge of IT groups to scale and keep up with the growth of the company. 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 Spring ITL Planning leaders and will be distributed to the participants prior to the session.

## ITL-T

### ITL Tactical Roundtables

Room: Regency East 1-2

The ever-popular ITL Tactical Roundtables for this Fall 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!

- **Application Development:** *Curtis Shelton – CBIZ, Inc., Cleveland, OH*
- **Infrastructure/Engineering:** *Matt Jennings – Baker Tilly, Madison, WI*
- **Service Delivery and Metrics and Support:** *Tony Walton - Baker Tilly, Madison, WI*
- **Project Management:** *Kathy Rogers – DHG, Hendersonville, NC*
- **Security/Compliance:** *Elizabeth Hesburgh – Crowe LLP, South Bend, IN*

**Monday, November 4 – 4:30 – 5:00 pm – No CPE**

## All

### ITL Ignite!

Room: Regency Center

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

“Ignite” is back on the agenda! Ignite talks are creative, enlightening, and a perfect opportunity to live the ITA motto – Knowledge Increases in Value When It Is Shared. The concept of Ignite is where you’ll see a few of our ITA members come up on stage and give 5 minute presentations about something personal or professional that they are passionate about. The concept of Ignite is to “Enlighten us, but make it quick!” In the last ITA Ignite session we learned binder clip hacks, the joys and perils of taking risks, cycling’s rules of the road, supporting and hiring US vets, men with brooms and a variety of other useful (and useless) topics. The whole idea behind Ignite is to learn something new about your ITA members in a fun and informal way. And, by the way, beer and wine will be served!

**Tuesday, November 5 – 8:00 – 9:15 am - (75 CPE Minutes)**

## CR-1

### You Can’t Manage What You Don’t Measure: Measuring The Maturity Of Your Professional Services Organization To Drive Growth And Profitability

Room: Regency West

*Dave Hofferberth – SPI Reseach, Liberty Township, OH*

High performing professional services organizations display excellence in five critical business categories. How can you transform your business by understanding the maturity level of your professional services organization? In this session we will:

- Learn about the five key pillars for success in a professional services organization
- Identify the key metrics that you can use to measure your performance in each of the five categories
- Discuss the strategies that the best of the best professional services firms use to improve profitability and performance

## CR-2

### The Customer Journey: Developing An Extraordinary Experience

Room: Regency Center

*Robert Johnson – JMT Consulting Group, Inc., Patterson, NJ*

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

In this two-session combo, we begin with a plenary session featuring speakers Mark Severance and Rob Johnson. Mark will review some of the foundational concepts and key learnings from the “Customer Journey” session at the ITA Spring 2019 collaborative. Rob will then present a real-life case study of how he and the JMT team are re-imagining the client experience. Rather than completely abandoning client relationships once the initial implementation is complete(!), you’ll learn specific tools, processes, and ideas for a staffing structure that will enable you to be far more strategic and proactive in leading the customer journey and improving their experience. Specifically, we’ll focus on 7 key areas:

1. Analyzing your client base
2. Developing early warning systems
3. Getting your heart right
4. Creating segmented CX programs
5. Designing CX response protocols
6. Building and managing CX teams
7. Measuring your programs

## TI

### ITL Technology Innovation SIG

Room: Pecan

*Kevin Fraase - Eide Bailly LLP, Fargo, ND*

Many of our firms are at different stages of implementing a robotic process automation solution. A generally accepted best practice is the formation of a center of excellence (COE). In this session we will:

- Examine the COE structures our firms have adopted, including the implementation process
- Discuss the composition and representation of team members throughout our firms and how they were selected
- Discuss our experiences with recruiting team members and how actively they participate
- Discuss the challenges faced with forming and ‘activating’ our circles of excellence
- Discuss how work intake happens and how priorities occur based on the viability of the request and perceived value to the business
- Discuss roles of the COE beyond RPA

## ITL-S

### How I Learned to Stop Worrying and Love the Cloud – Governance and Change Management in the Era of Cloud Applications

Room: Live Oak

**Facilitator:**

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

**Panelists:**

*Jim Bruxvoort – Rehmann, Grandville, MI*

*Robert Jamison – Elliott Davis, LLC, Greenville, SC*

*Greg Shoemaker – BKD, LLP, Dallas, TX*

To paraphrase the great fictional character, General Jack D. Ripper - “I can no longer sit back and allow Cloud infiltration, Cloud indoctrination, Cloud subversion, and the international Cloud conspiracy to sap and impurify all of our precious bodily fluids.” The ongoing move from on-premise to cloud systems and environments has offered many benefits, while also creating new challenges. Some IT organizations have embraced this changes, while others have fought it. Regardless, all IT organizations have struggled with how to manage the governance and change management aspects. In this session, we will host a panel discussion to learn how firms are dealing with these challenges and what they have learned works (and doesn’t). Attendees will learn:

- What types of governance firms have implemented for managing cloud/SaaS applications
- How the move to cloud has changed the types of governance roles and activities that both the business users and IT perform
- How change management is different with cloud applications and how the role of the business and IT has evolved
- How the IT organizations have changed to adapt to the move to cloud



## ITL-T

### Next Generation Networking Technologies

Room: Regency East 1-2

**Facilitator:**

*Matt Jennings – Baker Tilly, Madison*

**Panelists:**

*Chris Fitzmaurice – Rehmann, Saginaw, MI*

*Josh Anderson – Wipfli LLP, Eau Claire, WI*

*Nathan Novacek – Eide Bailly LLP, Fargo, ND*

*Leif Snapp-Cook – Baker Tilly, Englewood, CO*

In the world of cloud first thinking, high speed wireless and ever higher bandwidth needs, many firms are evaluating the foundational layer beneath it all; The Network. This session will explore how member firms are evaluating their communication needs and making choices that support this new reality. We'll look at new edge technologies, business drivers and desired outcomes while sharing lessons learned.

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

## CR-1

### Stop The Project Madness! Achieve More With Smartsheet

Room: Regency West

*Bob Gaby – RKL eSolutions LLC, Simi Valley, CA*

Project visibility, across the organization from Consultants to Account Managers, is a common challenge for most partners. From task management to complex portfolio management, Smartsheet enables project management professionals to streamline workflows, eliminate silos, and achieve more. Learn how Bob Gaby, COO of RKL eSolutions, designed a Project Tracking tool to improve operational effectiveness across the organization. This session will introduce and explore Smartsheet templates and technologies to provide Dashboard metrics, project visibility and at-risk engagements throughout the organization. Topics include management of contracts, projects, tasks, project status, resources and financial insights. Attendees will receive tips, best practices, and a demonstration of a project management solution using Smartsheet.

## CR-2

### The Customer Journey: Developing An Extraordinary Experience – Continued

Room: Regency Center

*Robert Johnson – JMT Consulting Group, Inc., Patterson, NJ*

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

In this two-session combo, we begin with a plenary session featuring speakers Mark Severance and Rob Johnson. Mark will review some of the foundational concepts and key learnings from the "Customer Journey" session at the ITA Spring 2019 collaborative. Rob will then present a real-life case study of how he and the JMT team are re-imagining the client experience. Rather than completely abandoning client relationships once the initial implementation is complete(!), you'll learn specific tools, processes, and ideas for a staffing structure that will enable you to be far more strategic and proactive in leading the customer journey and improving their experience. Specifically, we'll focus on 7 key areas:

1. Analyzing your client base
2. Developing early warning systems
3. Getting your heart right
4. Creating segmented CX programs
5. Designing CX response protocols
6. Building and managing CX teams
7. Measuring your programs

## ILA SIG

### Making Accountability a Core Strength

Room: Pecan

*Bret Romney – Ascend Strategies, Inc., Montana City, MT*

Is accountability a core strength of your company that delivers a competitive advantage? Are things done well the first time, when agreed upon and within budget? Do team members embrace or avoid personal accountability? Do you hear too many excuses for mediocre performance? Do you feel like you must babysit more than you'd like? Most surveys reveal that accountability is much easier to talk about than to achieve. We will explore:

1. Why driving improved accountability is such a big deal
2. The specific drivers that affect accountability
3. How to make improved accountability everyone's responsibility – and one they embrace
4. Moving from a hierarchical/position-based model to a team-based model of accountability

## ITL – S

### What To Do When a Cloud Goes From Fluffy To Ominous: Managing Risk In The Cloud

Room: Live Oak

#### Facilitator:

*Mark Isenbarger – Crowe LLP, Indianapolis, IN*

We all know the business benefits of the cloud. It brings scale, flexibility, and speed. It is even touted as being more secure than anything on premise. After all, they are run by mega companies with large security budgets. But, even the cloud can grow dark and ominous when things don't go as planned. In this session, we will discuss how to plan your cloud deployments to operate smoothly and leading practices for managing through unplanned operational challenges, including incident response, back-up glitches, disaster recovery and, yes, even human error.

## ITL – T

### Microsoft Teams Governance Models And Real-World Experiences

Room: Regency East 1-2

#### Facilitators:

*Kevin Fraase - Eide Bailly LLP, Fargo, ND*

*Tony Walton - Baker Tilly, Madison, WI*

#### Panelists:

*Aaron Abbott – Eide Bailly LLP, Fargo, ND*

*Jeff French – Elliott Davis, LLC, Greenville, SC*

*Jeremy Schroeder - WithumSmith+Brown, NY, NY*

This session continues the conversation we started at our ITL summer collaborative. In this session, we will:

- Discuss and compare governance models adopted by member firms.
- Detail the road blocks encountered with implementation and adoption.
- Share real-world experiences members encountered implementing MS Teams.

## **CR-1**

### **Employee Retention: Why Retaining Employees Isn't Always The Goal**

**Room: Regency West**

**Facilitator:**

*Christi Whipple – Avalara, Irvine, CA*

**Presenter:**

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

Attracting and retaining good talent can make or break your business. Some companies tout the fact that their employees stay around for many years but is high employee retention always a good thing? Some business owners think Human Resources is only for large companies but that can't be farther from the truth. Find out how to identify your top talent and how to keep them.

Retention is more of a strategy than an outcome. Join this session to learn:

- 3 actionable strategies you can start next week
- What you should never do when an employee says they are leaving
- Individual contributor vs. leader - who goes where and why?
- How to develop your long-term retention plan and tailor it to your business

## **CR-2**

### **Play Chess Not Checkers With Your Account Management Team**

**Room: Regency Center**

**Facilitators:**

*Ethan Haberman – Eide Bailly LLP, Coeur d Alene, ID*

*Jonathan Morgan – Vertex, King of Prussia, PA*

**Panelists:**

*Allan Clark – Eide Bailly LLP, Salt Lake City, UT*

*Matt Kenney – RSM US, LLP, Denver CO*

*Lori Seal – Blytheco, Laguna Hills, CA*

Great Account Managers are like great chess masters with your clients. Each person has unique abilities, skill sets, strengths and knows their limitations. They know their accounts and how to position them to draw the best outcome for a win-win for both organizations. Remember the Account Managers are your company's voice to your customers.

Learning objectives:

- Gain insight into how various types of companies Account Management teams are organized, especially when handling more than one ERP.
- Hear first-person accounts from some of our industry's leaders on what qualities they are looking for when hiring, and retaining great talent.
- Identify some areas of improvement in your organization today.

## **ITL – S**

### **Unified Communications 2.0**

**Room: Live Oak**

**Facilitator:**

*Allen Smith – Baker Tilly, Madison, WI*

As technology has evolved and the needs of our firms has changed, what would the next generation of communication systems look like? We have a number of firms that are on traditional VoIP systems like Cisco, Avaya. We also have a number of firms that migrated to Skype. With Teams now being an option and other non-traditional options available like Zoom and Ring Central, what are firms considering for Unified Communications 2.0? And to supply a provocative thought, are any firms thinking of simply not having any voice-centric system? These are all questions that we should discuss and share!

## ITL – T

### Making Changes To Manage Changes To Make Changes

Room: Regency East 1-2

Facilitator / Discussion Leader:

*Tony Walton - Baker Tilly, Madison, WI*

#### Group Discussion

It is often said that the only thing constant in life is change. This has never been more evident in the Information Technology arena within today's organizations. IT is continually facing changes in standards, technology, mobility, mergers, consolidations, globalization, company culture and more. On top of that, software vendors, Risk and Security teams and many other sources impose deadline-driven changes that must be incorporated into the production environment. IT is often times brought in to implement new software or changes to existing software late in the game. More challenging is that IT may not be made aware that a technology was implemented on the firm side until updates are required or support is needed. The variables of these scenarios create a magnitude of challenges for IT and the firm users that historically have not been easy to overcome. The impact ultimately falls on our clients. This group discussion will focus on sharing ideas and insight on how IT and the firm can better collaborate and execute technology changes. We will explore and share what works and what doesn't across our firms, providing valuable takeaways to help us understand what we can start, stop or continue doing to mature the change management effectiveness within our organizations.

**Tuesday, November 5 – 1:30 – 3:00 pm - (90 CPE Minutes)**

## CR-ALL

### Roundtables - Let's Continue The Conversation

Room: Regency West

*Marc Palombo – AvidXchange, Charlotte, NC*

*Aaron Rosenberg - Oasis Solutions Group, Louisville, KY*

Join your fellow consulting & reselling partners, ERP vendors, ISV members in individual roundtables to discuss some of the topics that were covered in today's sessions.

- Share more ideas from the session you attended. If you wanted to attend a session, but were in another, attend a roundtable to learn more about what was discussed.
- Identify one idea, or service that could be implemented in your practice.

Table 1-Managing & Measuring Your Growth

Table 2-The Customer Journey

Table 3-Achieve More with Smartsheet

Table 4-Employee Retention Discussion

Table 5-Account Management Strategy

## ITL-S

### ITL Strategic Roundtables

Room: Live Oak

*Mike Denno – Rehmann, Saginaw, MI*

*Allen Smith – Baker Tilley, Madison, WI*

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.

## ITL-T

### ITL Tactical Roundtables

Room: [Regency East 1-2](#)

The ever-popular ITL Tactical Roundtables for this Fall 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!

- **Application Development:** *Curtis Shelton – CBIZ, Inc., Cleveland, OH*
- **Infrastructure/Engineering:** *Matt Jennings – Baker Tilly, Madison, WI*
- **Service Delivery and Metrics and Support:** *Tony Walton - Baker Tilly, Madison, WI*
- **Project Management:** *Kathy Rogers – DHG, Hendersonville, NC*
- **Security/Compliance:** *Elizabeth Hesburgh – Crowe LLP, South Bend, IN*

**Tuesday, April 30 – 3:00 – 3:15 pm**

### Wrap Up Sessions & Adjournment of the ITA Fall Collaborative

## CR

Room: [CR Regency West](#)

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

## ITL

Room – [Regency East 1-2](#)

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



## 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: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and IT Client Infrastructure & Managed Services Consulting. 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.nasbregistry.org](http://www.nasbregistry.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.