#ITAFall23

INFORMATION TECHNOLOGY ALLIANCE
FALL COLLABORATIVE
ST. PETERSBURG, FL
2023

ITA Mobile
Your Meeting Guide
https://eventmobi.com/itafall2023

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Sunday, November 5

Time	Event
2:30PM - 7:30PM	**Badge Pickup** **Grand Ballroom Foyer**
3:30PM - 4:30PM	**Meet, Greet & Eat Session** **Mezzanine Terrace**
4:30PM - 6:00PM	**ITA Opening Session** **Grand Ballroom** **President's Welcome** Geni Whitehouse **KEYNOTE: Hacking The Rockstar Attitude: How To Rise To The Top In Uncertain Times** Mark Schulman
6:00PM - 7:30PM	**Welcome Reception** **Tea Garden**
7:30PM	**Dinner On Your Own and Various Partner Events**

Monday, November 6

Time	Event
7:00AM - 8:00AM	**Breakfast** **Marchand's - Lobby Level**
7:00AM - 5:00PM	**Badge Pickup** **Grand Ballroom Foyer and Palm Court Foyer**
8:00AM - 10:15AM	**Monday Opening Session** **Grand Ballroom** **Opening Session Welcome And A Conversation With New President** Geni Whitehouse (Moderated by Gail Perry) **Overview Of The ITA Leadership Academy (ILA)** Bret Romney **KEYNOTE: Innovation Is Out.... Chaotic Innovation Is In** Nick Webb

TRACKS & SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING SERVICES (CAS) **Mirror Lake**	Internal Tech Leaders (ITL)	
	CR TRACK 1 **Majestic 2/3**	**CR TRACK 2** **Royal 2/3**		**ITL STRATEGIC** **Royal 1**	**ITL TACTICAL** **Majestic 1**
10:30PM - 12:00PM	AI And ERP - How Is It Shaping The Landscape Now And Into The Future	Transitioning From Reseller To Publisher: Top 5 Do's And Don'ts	Leadership Challenges Of CAS Practices In Accounting Firms (CAS Members Only)	Trust No One: The Truth Is Out There On A Zero Trust Strategy	Mastering IT Onboarding: Best Practices for the Post Pandemic Environment
12:00PM - 1:15PM	**Lunch** **Grand Ballroom**				
1:15PM - 2:30PM	The Why, When and How of Services-as-a-Subscription	A Case Study In Building Business Value For A Successful Sale	CAS Strategy: Are We Building This Right? (CAS Members Only)	Becoming A Prepper: Disaster Recovery And Business Resilience In The Days Of Cloud Computing	The Secret Sauce For Managing A Successful Support And Service Organization
2:45PM - 4:00PM	Beyond the Horizon: ERP Marketing Magic for 2023!	Understanding Your Opportunities In An M&A Transaction: Portfolio Companies, Tuck-Ins, Add-Ons, And Bolt-Ons	People Challenge: Do We Have The Optimal Org Chart? (CAS Members Only)	Better Bring Your (M&) A Game: Best Practices For Your Future Transactions	No Rest For The Wicked: Security Operations In A 24/7 Threat Environment
4:15PM - 5:15PM	Unlocking Greatness: Leveraging AI Tools Effectively in Your Practice	Best Practices When Merging Firms	Process Challenge: Where Are The Inefficiencies? (CAS Members Only)	ITL Strategic Roundtables	ITL Tactical Roundtables
5:30PM - 6:15PM	**Down With AI: Let's Hear It For Human Intelligence!** Host: Mark Severance **Trivia Game - Join the fun and win some prizes (everyone can play)** **Grand Ballroom**				
6:30PM - 9:00PM	**Fall Fling Party & Dinner	Join Us For Dinner, Fun And Networking!** **Esplanade**				

Tuesday, November 7

Time	Event
7:00AM - 8:00AM	**Breakfast** **Grand Ballroom**

TRACKS & SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING SERVICES (CAS) **Mirror Lake**	Internal Tech Leaders (ITL)	
	CR TRACK 1 **Majestic 2/3**	**CR TRACK 2** **Royal 2/3**		**ITL STRATEGIC** **Royal 1**	**ITL TACTICAL** **Majestic 1**
8:00AM - 9:15AM	Not Quite The End Of The World As We Know It: Helping Our Clients Understand AI And Its Value To Their Organization	Speed Demo Session: Aligning Tech Solutions with Business Goals	Technology & CAS - Leaders And Key Vendor Alignment On Product Development Strategy (Part 1)	"Reveille Plays" Private Equity Approach To Technology	Arming The Troops: Keeping Our Users Equipped With The Hardware And Software They Need
9:30AM - 10:45AM	Mastering the Talent Lifecycle: Harnessing Predictive Tools for Optimized Hiring, Team Synergy, and Sustained Engagement	Unlocking Productivity: Understanding Administrative Time And Maximizing/Realizing The Value Of Non-Billable Hours	Technology & CAS - Leaders And Key Vendor Alignment On Product Development Strategy (Part 2)	Opening The Door To External Collaboration Tools: The Key To Success Or The Key To Pandora's Box?	Microsoft 365 Copilot – A New Way To Work
11:00AM - 12:15PM	Empower, Evolve, Excel: Fueling Success With Transformative Training And Development Strategies	Outsourcing Stampede: Saddle Up for Wild West Business Growth!	Leverage ITA For CAS: Let's Build Something Special!	Vendor Contract Negotiations – You Can't Always Get What You Want (ITL Members Only)	Windows 11: The Last Microsoft Upgrade You Will Have To Install!
12:15PM - 1:30PM	**LUNCH** **Grand Ballroom**				
1:30PM - 3:00PM	Customer Delight 2.0: Thriving In The Dynamic Tech Universe! **Royal 2/3**		Fireside Chat: What Do We Need to be Successful?	ITL Strategic Roundtables	ITL Tactical Roundtables
3:00PM - 3:15PM	CR Wrap Up Session **Royal 2/3**		CAS Wrap Up Session	ITL Wrap Up Session **Majestic 2/3**	

Wednesday, November 8

Time	Event
8:30AM - 3:00PM	**ITA Leadership Alliance (ILA) Base Camp - Class of 2023** **Mirror Lake C/D** Note: Session is **NOT** part of the ITA Collaborative. This is the ILA Group.

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

Sunday, November 5 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (60 CPE Minutes)

4:30 – 4:45 pm
President's Welcome & Introductions
Room: Grand Ballroom
Geni Whitehouse – ITA President, Napa, CA
ITA President Geni Whitehouse welcomes our new members and guests. She will also provide an overview of the Fall Collaborative agenda prior to introducing our Sunday night keynote speaker.

4:45 – 6:00 pm (75 CPE Minutes)
KEYNOTE: Hacking The Rockstar Attitude: How To Rise To The Top In Uncertain Times
Room: Grand Ballroom
Mark Schulman – Infinite Speakers Agency – Professional Speaker, Monster Drummer, and TV Personality
The rockstar attitude can be summed up in five words: There are no small moments. Every detail is critical. Everything you do matters. The world's greatest pop and rock artists share that attitude – something drummer MARK SCHULMAN learned first-hand after years of touring with acts like Cher, P!NK, Foreigner, Simple Minds, Stevie Nicks, and Billy Idol. Great performers in business are called rockstars, but true rockstars can teach the business world a lot about leadership, teamwork, resilience, engagement, and performing at the highest levels. Mark's ultra high-energy presentation is where music, video, audience interaction, and the secrets of rockstar performance collide. He inspires audiences to hack the rockstar attitude to discover the joy and success that comes when they're fully engaged – on purpose. It's as simple as ABC: Attitude.Behavior.Consequences. Mark shows how creating that attitude shift – and viewing what you're doing everyday as a performance – will literally change your life.

Monday, November 6 – 8:00 – 10:00 am - Monday Morning General Session & Keynote (90 CPE Minutes)

ALL

8:00 – 8:30 am

Opening Session And A Conversation With New President, Geni Whitehouse

Room: Grand Ballroom

Moderator: *Gail Perry – CPA Practice Advisor, Carmel, IN*

Geni Whitehouse – ITA President, Napa, CA

Join Gail Perry, editor of The CPA Practice Advisor in an exclusive interview of our new ITA President, Geni Whitehouse. You'll learn more about our new President's background, mission, and plans for the future of the ITA. Then, ITA President Geni Whitehouse will introduce our Fall Collaborative Committees and share opportunities for participation. Geni will share some other exciting ITA Events and plans.

ALL

8:30 – 8:45 am

Overview of the ITA Leadership's Academy (ILA)

Room: Grand Ballroom

Bret Romney - Ascend Strategies, Inc, Montana City, MT

Join us to learn about the amazing ITA Leadership Academy (ILA). Building leadership is critical to the near and long term success of your firm or company. ITA's Leadership Alliance (ILA) has been designed to accomplish the following goals:

• To awake and enhance a desire to grow as leaders.
• To provide tools that foster leadership development and unleash potential.
• To develop deep peer interaction – ideas, sounding board and support.
• To improve communication.
• To facilitate more successful succession – leadership and ownership.
• To grow the next leaders of ITA members.

ALL

8:45 – 10:15 am (90 CPE Minutes)

KEYNOTE: Innovation Is Out.... Chaotic Innovation Is In

Room: Grand Ballroom

Nick Webb – Infinite Speakers Agency - Professional Speaker, Entrepreneur, Inventor, and Author

In the ever-evolving landscape of innovation, we find ourselves in an era of chaotic innovation. Over the past two decades, we have journeyed from symmetrical innovation to disruptive innovation, and now we face the amorphous nature of change and the staggering speed at which it occurs. This rapid transformation is largely driven by emerging technologies that are shaping the way we live and work.

Among these technologies, artificial intelligence (AI) stands as a ubiquitous force, with powerful tools like ChatGPT and Bard pushing the boundaries of what's possible. Robotic Process Automation (RPA) is automating standard business processes, while advanced connection architectures are revolutionizing the way we connect and interact.

In this captivating and uplifting talk, renowned technology futurist Nick Webb presents a compelling framework for harnessing the potential of emerging technologies. With a focus on driving predictable and scalable growth, as well as improving the quality of work life and customer experiences, Nick offers an accessible and engaging approach to navigating the future.

Concurrent Sessions – By Date and Time

Monday, November 6 - 10:30 am 12:00 pm – (90 CPE Minutes)

CR-1
AI And ERP - How Is It Shaping The Landscape Now And Into The Future
Room: Majestic 2/3

Facilitators:
Brian Gallagher – Inscio, Plano, TX
Benjamin Weiss – Acumatica, Kirkland, WA
Panelists:
CJ Boguszewski – Acumatica, Reston, VA
James Cramer – Workday, Boca Raton, FL
Kent Hollrah – Sage, Eastern Region, Irvine, CA
Craig West – Oracle NetSuite, San Mateo, CA

AI has been deployed for years already. From organizations like Amazon with Alexa, Apple with Siri, car driving from Tesla and many other examples we hear about in the news every day. But what about our business applications? AI has been in the news with applications like ChatGPT and Google's BARD on a weekly basis. So the question that comes to mind is how are companies like Acumatica, Oracle NetSuite, and Workday handling this subject now, and in the future. Please join the Panel members (mentioned above) for an interactive discussion on how ERP is being affected by AI now and what it will look like in the future.

CR - 2
Transitioning From Reseller To Publisher: Top 5 Do's And Don'ts
Room: Royal 2/3

Jared Burke - goVirtualOffice, LLC, Dodgeville, WI
Greg Fuhrman – FM Consulting Partners, St. Petersburg, FL
Pamela McDaniel – Dynavistics, Lakeland, FL
Brian Terrell - BTerrell Group, LLP, Plano, TX

By 2025, the SaaS market is expected to reach a valuation of $242.9 billion - an increase of 113.49%. Currently the US holds 60% of that market share. Are you ready to get your piece of the pie? If you're thinking of making the leap from reseller to publisher, it's important to know the dos and don'ts. Join us for this session and learn from companies that are at various stages of this transition. The group of speakers will provide insights on transitioning successfully. Content will focus on the top five do's and don'ts of taking your business from a software reseller to a software publisher while avoiding major pitfalls.

CAS
Leadership Challenges Of CAS Practices In Accounting Firms
(CAS Members Only)
Room: Mirror Lake

Irfan Dossani – Whitley Penn, Dallas, TX
Kane Polakoff – CohnReznick, Farmington Hills, MI

A workshop for ITA CAS Members to collaborate and share leadership challenges inside large Accounting Firms; Goal is to share and use it to start forming a framework around how to build ITA CAS track for the rest of the fall session as well as to design ITA CAS track going forward.

ITL-S

Trust No One: The Truth Is Out There On A Zero Trust Strategy

Room: Royal 1

Lock Langdon – Aprio, Atlanta, GA
Nate Roberts – Wipfli LLP, Green Bay, WI

Between industry buzz words and magic bullet vendor pitches, finding the truth of what a Zero Trust security strategy is can be almost as difficult as implementing one. In this Panel session we'll learn what Zero Trust entails and how our member firms use it to keep bad actors at bay.

Specifically, we will share:

• What Zero Trust is (and what it is not)
• Describe the 3 principles, 4 goals, and 5 pillars of Zero Trust
• 5 Benefits of Zero Trust over Traditional Security Models
• How you implement Zero Trust model

ITL-T

Mastering IT Onboarding: Best Practices for the Post Pandemic Environment

Room: Majestic 1

Melissa Benedict - RubinBrown LLP, St. Louis, MO
Alan Newhouse - Miller Cooper & Co., Ltd., Deerfield, IL
Michael Voegtline – Wipfli LLP, Wausau, WI

Join us for an engaging discussion on the art and science of effective IT onboarding practices. In this interactive session, our expert panelists will address challenges and share best practices that can transform your onboarding process into a competitive advantage. We will also address specific considerations for contractor and international employee onboarding.

Key Takeaways:

• Understand the importance of effective engagement with HR teams
• Learn how to incorporate automation into the onboarding process
• Getting it all back – effective offboarding procedures

Monday, November 6 – 1:15 – 2:30 pm – (75 CPE Minutes)

CR-1

The Why, When And How Of Services-as-a-Subscription

Room: Majestic 2/3

Jason Dennis - Kimberlite Partners, LLC, Danville, CA

In today's rapidly evolving business landscape, the concept of Services-as-a-Subscription (SaaS) has gained significant traction. This informative session delves into the core principles behind SaaS, exploring the motivations, optimal timing, and practical implementation strategies for businesses looking to embrace this model. If you are considering transitioning from a traditional support model to Services-as-a-Subscription, this session will provide a practical overview of the why, when, and how to successfully make the transition. Join us and learn from business leaders that have made the journey and can provide insights into the process, benefits and pitfalls to avoid. By attending this session, participants will:

• Understand the motivations driving the adoption of Services-as-a-Subscription.
• Learn to identify the right timing for transitioning to a SaaS model.
• Gain insights into practical strategies for implementing SaaS effectively.
• Acquire a comprehensive view of the benefits and challenges associated with SaaS adoption.

CR-2
A Case Study In Building Business Value For A Successful Sale
Room: Royal 2/3

Jim Falkanger – Retired, Central Consulting Group, Minneapolis, MN
Leary Gates - Lumina Consulting Group, Eduba, MN

Learn how Central Consulting Group, a long-time ITA member and Deltek Business Partner, transformed their business to significantly increase business value and garner a successful sale. Resellers and consulting business owners will want to hear former CEO Jim Falkanger and business advisor Leary Gates share their journey to maximize value and achieve multiple exits at 7x revenue. They'll dissect the challenges and their roadmap to scale business and accelerate enterprise value growth, and share how they:

- Identified and prioritized growth market opportunities
- Aligned owner objectives.
- Created compelling value propositions.
- Evaluated sales readiness.
- Packaged business assets (client, vendor and partner relationships, technology capabilities) for optimal appeal.
- Positioned the business for exit.
- Selected and worked with a business broker.

CAS
CAS Strategy: Are We Building This Right?
(CAS Members Only)
Room: Mirror Lake

Irfan Dossani – Whitley Penn, Dallas, TX
Kane Polakoff – CohnReznick, Farmington Hills, MI

A workshop for ITA CAS Members to collaborate and share CAS building strategy inside large Accounting Firms; Goal is to share and use it to start forming a framework around how to build ITA CAS track for the rest of the fall session as well as to design ITA CAS track going forward.

ITL-S
Becoming A Prepper: Disaster Recovery And Business Resilience In The Days Of Cloud Computing
Room: Royal 1

Facilitator:
Joe Mika - Miller Cooper & Co., Ltd., Deerfield, IL
Panelists:
Chris Fitzmaurice – Rehmann, Saginaw, MI
Peter Monaghan – Aprio, Rockville, MD

Are you ready for the day the hacker encrypts all your files? How long can you afford to be down?   In this session we will discuss we will:

- Discuss DR solutions for in house applications and files.
- Discuss DR solutions for cloud-based system.
- Discuss DR testing strategies.
- Discuss recovery time estimates.

ITL-T
The Secret Sauce For Managing A Successful Support And Service Organization
Room: Majestic 1

Facilitator:
Kevin Fraase – Eide Bailly LLP, Fargo, ND
Panelists:
Mary Boyle – Rehmann, Farmington Hills, MI
Kendrick Hagins – Whitley Penn, Forth Worth, TX
Steve Rage - Eide Bailly LLP, Fargo, ND
Michael Voegtline - Wipfli LLP, Wausau, WI

Managing a responsive and competent support operation is critical to the success of any firm. It involves having the right team, tools and support from leadership. In this session we will hear from three panelists how their service desk is managed within their respective firms. We will discuss how their teams are structured. They will describe the systems they use, and whether they incorporate AI tools in their environments. We will also discuss best practices for handling the variety of support and service challenges we all face. Session attendees are welcome to share their experiences and successes as well.

Monday, November 6 – 2:45 – 4:00 pm – (75 CPE Minutes)

CR-1
Beyond The Horizon: ERP Marketing Magic For 2023!
Room: Majestic 2/3

Misty Palek – Palek Consulting, Slater, IA
Rich Haselden - Kimberlite Partners, LLC, Santa Cruz, CA
Jon Rivers - Marketeery, Tampa, FL

Propel your marketing strategies into the future with our dynamic session, "Beyond the Horizon: ERP Marketing Magic". Dive into the transformative power of AI and ML technologies, mastering the art of hyper-personalized experiences that boost customer satisfaction and ROI. Explore the cosmos of data integration and analysis, making data-driven decisions to drive your marketing efforts to new heights. Safeguard your success with critical knowledge on data security and privacy, ensuring trust and compliance in a rapidly evolving landscape. Discover the advantages of cutting-edge cloud-based ERP marketing solutions, unleashing your potential for flexibility, scalability, and cost-effectiveness. Don't miss this journey into the future of marketing, where you'll gain the insights and tools to thrive in the ever-changing marketing universe!

CR-2
Understanding Your Opportunities In An M&A Transaction: Portfolio Companies, Tuck-Ins, Add-Ons, And Bolt-Ons
Room: Royal 2/3Res

Linda Rose – RoseBiz, Inc., Encinitas, CA

Are you considering a mergers and acquisitions (M&A) sell-side event in the next 1 – 5 years? If so, you've likely come across various terms that describe different types of acquisitions. Deciphering the differences between a portfolio company, a tuck-in, add-on, and bolt-on can be a daunting task, but fear not! This session is designed to demystify these sale options and provide you with a clear understanding of each along with the multiples associated with each type. Join us for an insightful session where Linda Rose will delve into the intricacies of M&A acquisitions and explore the distinct features that set portfolio companies, tuck-ins, add-ons, and bolt-ons apart. She will also share with you current multiple expectations and long-term equity scenarios as you ponder that second bite of the apple. During this session, we will break down the terminology, explore practical examples, and discuss best practices for executing your sale of choice. Whether you're selling in one or five years, this session will provide you with valuable insights on how to plan and prepare your company to navigate the M&A landscape effectively. Don't miss this opportunity to gain expert knowledge and pick up your copy of Get Acquired for Millions: A Roadmap for Technology Service Providers to Maximize Company Value (limited supply) and acquire the knowledge to accelerate your M&A endeavors.

CAS

People Challenge: Do We Have The Optimal Org Chart?

(CAS Members Only)

Room: Mirror Lake

       Irfan Dossani – Whitley Penn, Dallas, TX
       Kane Polakoff – CohnReznick, Farmington Hills, MI

A workshop for ITA CAS Members to collaborate and the people challenges as we build CAS practices inside large Accounting Firms; Goal is to share and use it to start forming a framework around how to build ITA CAS track for the rest of the fall session as well as to design ITA CAS track going forward.

ITL-S

Better Bring Your (M&) A Game: Best Practices For Your Future Transactions

Room: Royal 1

       Facilitator:
       Russell Gibson – UHY Advisors, Houston, TX
       Panelists:
       Michael Connell – CLA, Middleton, WI
       Kevin Fraase – Eide Bailly LLP, Fargo, ND
       Peter J. Scavuzzo – Marcum LLP, New, NY

It seems M&A activity has never been more prominent in the accounting profession than it is today. As firms continue to push for rapid growth, integration teams are being tasked with executing multiple transactions per year with many occurring simultaneously. This uptick in activity is not isolated to larger firms performing dreaded "tuck-in". Larger peer firm mergers are becoming more common, as well.

Join us for a panel discussion to learn best practices to help your firm be more successful with future transactions. In this session we will:

- Learn what tools firms are using to better manage due diligence and integration activities.
- Discuss how your transactions may be affected by the ever-increasing rigidity of cyber insurance policies.
- Identify how to assist other functional areas such as Finance, HR, Marketing, Legal improve their processes.
- Discuss the challenges and opportunities of private equity transactions.
- Scaling your ability to execute on your firm's M&A opportunities.

ITL-T

No Rest For The Wicked: Security Operations In A 24/7 Threat Environment

Room: Majestic 1

       Facilitator:
       Nate Roberts - Wipfli LLP, Green Bay, WI
       Panelists:
       Ken Barhite - Wipfli LLP, Green Bay, WI
       Tom Lee – Witley Penn, Fort Worth, TX
       Andrew Young - Baker Tilly, Chicago, IL

Security Operations sits on the front lines of defense for many of our organizations. Monitoring for and responding to malicious activity in a timely manner can make all the difference in preventing a user who was phished late on a Friday from turning into a ransomware incident early on a Monday. In this session we will learn how our fellow firms are tackling this challenge and what lessons they've learned along the way. Specifically, we will discuss:

- The roles and responsibilities of SecOps within our respective organizations.
- How we staff this important function whether internal, outsourced, or a hybrid approach.
- The tools and technologies used by our teams.
- Challenges faced in providing this coverage 24/7/365.

CR-1
Unlocking Greatness: Leveraging AI Tools Effectively In Your Practice
Room: Majestic 2/3

Jeff Jahn, Founder & CEO – DynamIX, Kennesaw, GA

Are you ready to move past the hype of tools such as ChatGPT and unlock the untapped potential of AI to drive your day-to-day efficiencies? Join us for an engaging session where you'll discover how to effectively integrate AI tools into your firm while gaining valuable insights into addressing downsides and compliance concerns.

In this session, Jeff will demonstrate see some exciting AI based solutions and share his perspective on the following:
- Practical techniques to implement AI solutions to help you optimize client interactions assist in marketing efforts, automate repetitive tasks, and streamline critical processes.
- Discuss real-world scenarios, empowering you with the skills to boost productivity, enhance decision-making, and stay ahead in a rapidly evolving market.
- Consider the challenges of AI implementation and delve into potential downsides and address compliance concerns, including data privacy and ethical considerations in AI usage.

Understanding these issues is vital to building a responsible and successful AI strategy for your firm. Join us for this session and unlock a world of possibilities to revolutionize your business efficiencies through AI innovation. Let's embark on this AI-powered journey together.

CR-2
Best Practices When Merging Firms
Room: Royal 2/3

Joe Noll - RKL eSolutions LLC, Lancaster, PA
Andrew Nunez - Scanco Software, LLC, Nokomis, FL
Edward Solomon – Net at Work, NY, NY

Whether you are acquiring a small practice or merging in a growing firm, mergers and acquisitions can fuel growth or wreak havoc.   Listen to the practice leaders who have been through the grinder and have developed the best practices for their firms. Sometimes mergers end before they begin or result in divorce after the merger. This interactive session will enable you to glean best practices and apply them to your merger or divestiture strategy.
- Culture and People
- Processes and Systems
- Maximizing the Return

CAS
Process Challenge: Where Are The Inefficiencies?
(CAS Members Only)
Room: Mirror Lake

Irfan Dossani – Whitley Penn, Dallas, TX
Kane Polakoff – CohnReznick, Farmington Hills, MI

A workshop for ITA CAS Members to collaborate and the people challenges as we build CAS practices inside large Accounting Firms; Goal is to share and use it to start forming a framework around how to build ITA CAS track for the rest of the fall session as well as to design ITA CAS track going forward.

ITL-S
Strategic Roundtables
(ITL Members Only)
Room: Royal 1

> *Rob Lewis – Rubin Bown LLP, St. Louis, MO*

Join the roundtable discussion where we will discuss the ITL Strategic sessions from today and dive a little deeper into some of the topics.

ITL-T
Tactical Roundtables
Room: Majestic 1

> *Michael Voegtline - Wipfli LLP, Wausau, WI*

Join the roundtable discussion where we will discuss the ITL Tactical sessions from today and dive a little deeper into some of the topics.

Monday, November 6 – 5:30 – 6:30 pm – (No CPE Minutes)

Down With AI: Let's Hear It For Human Intelligence!
Trivia Game (everyone plays for prizes)
Room: Grand Ballroom

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

Join us for the first ever session of ITA Trivia. After a full day of learning and before the Monday night party, take the opportunity to test your knowledge of very random topics against other ITAers. Everybody is a contestant and has the opportunity to win (semi)fabulous prizes. You won't want to miss it!

Tuesday, November 7 – 8:00 – 9:15 am - (75 CPE Minutes)

CR-1
Not Quite The End Of The World As We Know It: Helping Our Clients Understand AI And Its Value To Their Organization
Room: Majestic 2/3

> *David Cieslak - RKL eSolutions LLC, Simi Valley, CA*

The dizzying pace of innovation with AI and associated technologies represents a unique opportunity for ITA members to assist our clients. After an extended absence, Inspector Gadget (David Cieslak) returns to ITA to explain the current AI landscape and equip us to help our clients navigate it successfully. From tools with broad application to those included within the various solutions we sell and recommend, you'll understand what's available and secure practical ideas for communicating the significant value of AI to our clients.   Learning objectives:

• Understand the current AI landscape and what's coming in the near future
• Separate fact from fiction and hope from hype
• Learn specific ways that AI can help clients to be more strategic

CR-2

Speed Demo Session: Aligning Tech Solutions With Business Goals

Room: Royal 2/3

Facilitators:

Theresa Putzier – Roseville, MN

Stacy Schuettler – LBMC Technology Solutions, Knoxville, TN

Panelists:

Tom Fahres – Martin & Associates, Cincinnati, OH

Bob Gaby – RKL eSolutions LLC, Colorado Springs, CO

Moira Goggin – DSD Business Systems, Long Beach, CA

Chris J. Milan - Third Wave Business Systems LLC., Wayne, NJ

Mike Yeager - Cargas Systems, Inc., Lancaster, PA

As an owner or manager of a technology consulting firm, you understand the importance of guiding your clients towards technology solutions that align with their strategic objectives. But have you paused to ask yourself the same question? Join us for a speed demoing breakout session that challenges you to examine whether you are truly "walking the walk" you encourage your clients to take. In this interactive session, gain insights from your peers who will demo some of their "must-have" software tools that have proven instrumental in running their businesses efficiently. Explore what others are using to ensure your technology stack remains agile, scalable, and future-proofed to address ever-changing business needs. Take this opportunity to reflect on your own firm's approach and commitment to leveraging technology for business growth. Walk away with a renewed sense of purpose and the following actionable steps to realign your tech stack to unlock your firm's full potential.

• Engage in an honest assessment of your current technology software stack. Identify any gaps, redundancies, or inefficiencies that may be hindering your firm's productivity and growth potential.

• Assess timely and meaningful decision-making. You understand the power of data-driven insights and real-time analytics. Evaluate whether your firm possesses the necessary tools to make informed decisions swiftly and confidently.

• Explore the latest client engagement tools and techniques. Challenge yourself to assess if your sales and marketing teams are armed with the necessary tools to seize fresh opportunities and foster lasting client relationships.

• Examine some tech solutions that can streamline your financial processes, moving your finance team from data entry to strategic business advisors. Evaluate tools and software solutions that can deliver operational and support insights, empowering your firm's growth while enhancing customer interactions with your finance team.

CAS

Technology & CAS - Leaders And Key Vendor Alignment On Product Development Strategy (Part 1)

Room: Mirror Lake

Irfan Dossani – Whitley Penn, Dallas, TX

Kane Polakoff – CohnReznick, Farmington Hills, MI

A workshop for ITA CAS Members to collaborate with key CAS technology vendors and share what is working and where the challenges are as we build CAS practices inside large Accounting Firms; Goal is to share and use it to start forming a framework around how to build ITA CAS track for the rest of the fall session as well as to design ITA CAS track going forward. (Part I)

ITL-S
"Reveille Plays" Private Equity Approach To Technology
Room: Royal 1

Adi Garg – Parthenon Capital, Boston, MA

This session will unveil the disruptive forces and strategic shifts triggered by private equity's entry into the accounting sector and its impact on the technology function. Discovery how firms are navigating the heightened competition, accelerated innovation, and pace of growth. Learn where private equity is placing its technology bets and the expectations that they have for the technology function of the future. Attendees will learn:

- The typical approach that a Private Equity firm will take to advance the technology function.
- The expectations that Private Equity will have for the CIO and the Technology Function.
- The tips and tricks CIOs can use to best prepare.
- The biggest mistakes that technology leaders make.

NOTE: This was an enhanced version by ChatGPT

ITL-T
Arming The Troops: Keeping Our Users Equipped With The Hardware And Software They Need
Room: Majestic 1

Facilitator:
Kevin Fraase – Eide Bailly LLP, Fargo, ND
Panelists:
Tony Garaffa – CLA, Minneapolis, MN
Darby Gilbert – Eide Bailly LLP, Fargo, ND
Noel Rosales – UHY Advisors, Inc., Houston, TX
Kent Smyth – MNP LLP, Brandon, MD, Canada

Keeping our users fully armed with the hardware and software they need to do their jobs can be challenging to manage. Hardware devices and software versions are constantly changing, and our users demand the latest and fastest versions. In this session our panelists will discuss the tools used by their respective firms to perform these tasks. We will dive into the processes their firms use for provisioning software and hardware. And share victories and struggles with keeping their users equipped.   Session participants will be encouraged to share their experiences as well.

Tuesday, November 7 – 9:30 – 10:45 am - (75 CPE Minutes)

CR-1
Mastering The Talent Lifecycle: Harnessing Predictive Tools For Optimized Hiring, Team Synergy, And Sustained Engagement
Room: Majestic 2/3

Patrick Johnson – Oasis Solutions Group, Louisville, KY
Shereen Mahoney – Wipfli LLP, Reston, VA
Alyson McKinster – Wipfli LLP, Chicago, IL

This comprehensive session explores the transformative potential of predictive tools across the talent lifecycle. We'll start by examining how these advanced platforms, like the Predictive Index, can revolutionize the hiring process by ensuring accurate role-to-candidate matches, effectively eliminating the guesswork from talent acquisition. We'll explore how predictive tools enhance team dynamics, offering vital insights into your team's innate abilities, facilitating the formation of balanced, efficient teams that leverage strengths and complement each other. You'll also learn how these platforms allow for the early detection of potential disengagement issues, providing actionable insights to maintain a positive work environment and prevent talent loss. Through real-world examples and interactive discussions, you'll gain a holistic understanding of how predictive tools can be leveraged to enhance every stage of the talent lifecycle, driving overall organizational success.

CR-2

Unlocking Productivity: Understanding Administrative Time And Maximizing/Realizing The Value Of Non-Billable Hours

Room: Royal 2/3

Chris Isbell – Martin & Associates, Cincinnati, OH
Patrick Johnson – Oasis Solutions Group, Louisville, KY
Jim Norton - GRF CPAs & Advisors, Bethesda, MA
Todd Parrish - goVirtualOffice, LLC, Waunakee, WI

In this enlightening session, we delve into the intricacies of administrative time and explore the untapped potential of non-billable hours. By understanding the anatomy of administrative tasks, we uncover valuable insights into how these seemingly unproductive hours can be transformed into powerful assets for any organization. Join us as we explore the true value of non-billable hours and the often-overlooked opportunities they present for enhancing productivity and efficiency. Through interactive discussions and real-world case studies, we will identify common pitfalls that drain time and energy, as well as strategies to optimize and right-size meeting durations. Discover practical techniques to streamline workflows, prioritize tasks, and minimize time wastage, allowing you and your team to focus on what truly matters. Whether you're a professional seeking to enhance your personal productivity or a team leader looking to foster a culture of efficiency, this session is a must-attend to unlock the full potential of your organization's non-billable hours. Get ready to revolutionize how you view and utilize administrative time for a more prosperous and fulfilling work environment.

CAS

Technology & CAS - Leaders And Key Vendor Alignment On Product Development Strategy (Part 2)

Room: Mirror Lake

Irfan Dossani – Whitley Penn, Dallas, TX
Kane Polakoff – CohnReznick, Farmington Hills, MI

A workshop for ITA CAS Members to collaborate with key CAS technology vendors and share what is working and where the challenges are as we build CAS practices inside large Accounting Firms; Goal is to share and use it to start forming a framework around how to build ITA CAS track for the rest of the fall session as well as to design ITA CAS track going forward. (Part 2)

ITL-S

Opening The Door To External Collaboration Tools : The Key To Success Or The Key To Pandora's Box?

Room: Royal 1

Facilitator:
Kevin Fraase – Eide Bailly LLP, Fargo, ND
Panelists:
Angela Cooley – CohnReznick, Atlanta, GA
David Hirschkorn – Eide Bailly LLP, Fargo, ND
Chris Morrow – Warren Averett, Birmingham, AL
Kevin Sexton – Cohen & Company, Cleveland, OH

Many CIOs are under continual pressure to open our systems to collaborating with clients, vendors and other external users. In this session we will learn the policies our panelists' firms have adopted regarding external collaboration. And for the firms that have opened their systems to external collaboration, we will learn the tools they allow. We will discuss the risks in opening our firms to external collaboration, and the reasons why our users are requesting new tools and functionality. In the last portion of the session we will query the audience for their policies and systems.

ITL-T
Microsoft 365 Copilot – A New Way To Work
Room: Majestic 1

>**Facilitator:**
>*Joe Mika - Miller Cooper & Co., Ltd., Deerfield, IL*
>**Panelist:**
>*Trent Weiler – Microsoft, Redmond, WA*

Microsoft 365 Copilot isn't just a better way of doing the same things. It's an entirely new way of working. By using natural language, we'll illustrate the building blocks of Microsoft 365 Copilot and show how its output is grounded within your organization's data and context. Specifically, we will learn and discuss:

- The AI Powered Organization and why organizations need to invest in AI-driven solutions to stay competitive.
- Why Responsible AI matters and the potential AI has for today and tomorrow.
- How Microsoft 365 Copilot helps unleash creativity, unlocks productivity and uplevel skills.
- Understanding practical applications of Microsoft 365 Copilot for key personas.

Tuesday, November 7 – 11:00 am – 12:15 pm - (75 CPE Minutes)

CR-1
Empower, Evolve, Excel: Fueling Success With Transformative Training And Development Strategies
Room: Majestic 2/3

>**Facilitator:**
>*Shereen Mahoney – Wipfli LLP, Reston, VA*
>**Panelists:**
>*Brad Collard – Wipfli LLP, Green Bay, WI*
>*Patrick Johnson – Oasis Solutions Group, Louisville, KY*
>*Amy Knust – Eide Bailly LLP, Lincoln, NE*
>*Mike Yeager - Cargas Systems, Inc., Lancaster, PA*

In this dynamic session, we invite you to explore the incredible potential of forward-thinking training and development strategies that drive empowerment, evolution, and exceptional performance. In today's rapidly changing business landscape, the ability to adapt and thrive is crucial. This session is your gateway to discovering how to craft training programs that not only empower your workforce but also foster a culture of continuous evolution, enabling your organization to excel in the face of challenges. Our panel of speakers will share inspiring success stories and practical insights, highlighting the tangible benefits of transformative training initiatives. Learn how these strategies ignite a sense of purpose, engagement, and commitment among employees, laying the foundation for sustainable growth and innovation.

CR-2

Outsourcing Stampede: Saddle Up for Wild West Business Growth!

Room: Royal 2/3

Facilitator:
Misty Palek – Palek Consulting, Slater, IA
Panelists:
Jim Norton - GRF CPAs & Advisors, Bethesda, MD
Jeremy Potoka - Presales Leader LLC, Lancaster, PA
Julian Schrenzel - DyNexus Recruiting & Staffing, Seattle, WA

Howdy partners! In the untamed world of modern business, the wild, wild west of strategic outsourcing is the ultimate frontier for unlocking growth and staying ahead of the competition. Saddle up and join our high-spirited session, "Outsourcing Stampede: Leveraging Specialized Expertise Across Functions," where we'll explore how outsourcing can make your business ride into the sunset of success! Round up your knowledge as we corral the numerous non-core functions that can be outsourced, including Sales, Marketing, Human Resources, IT, Customer Support, Data Entry, Legal Services, and more. Lasso in the benefits of outsourcing, as we showcase how it empowers businesses with specialized expertise, cost savings, scalability, and innovative solutions.

CAS

Leverage ITA For CAS: Let's Build Something Special!

Room: Mirror Lake

Irfan Dossani – Whitley Penn, Dallas, TX
Kane Polakoff – CohnReznick, Farmington Hills, MI
Geni Whitehouse – ITA President, Napa, CA
Lissa Johnsen – ITA Vice President, Raleigh, NC

A workshop for ITA CAS members to combine what we have discussed in the sessions thus far and design a framework for ITA for CAS members going forward.

ITL-S

Vendor Contract Negotiations – You Can't Always Get What You Want
(ITL Members Only)

Room: Royal 1

Leon Faifman – University of Tampa
Nick Cadden - Carr, Riggs & Ingram, LLC, Enterprise, AL

Contract negotiation is an essential part of our personal lives as well as our professional lives. At times you succeed in getting what you wanted and maybe saved money in the process, or perhaps you had no leverage in the negotiation and you lost the battle. A good strategic negotiation shouldn't feel like either one but, instead, allow both parties to reach a mutually beneficial arrangement. In this session we'll identify key areas that you should focus on when negotiating with vendors and some best practices from firms.

ITL – T

Windows 11: The Last Microsoft Upgrade You Will Have To Install!

Room: Majestic 1

Facilitator:

Joe Mika - Miller Cooper & Co., Ltd., Deerfield, IL

Panelists:

Derek Feddersen – Plante Moran, Southfield, MI

Alan Newhouse - Miller Cooper & Co., Ltd., Deerfield, IL

We will have a discussion on our reasons for moving to Windows 11, our timelines, and what challenges we see in moving forward. Some firms are in a pilot phase getting ready to move forward with a more widespread deployment. I haven't heard from any firms that are deep down the migration path (from the sounds of things we are all at roughly the same point in the migration process).   The format of this will be a bit of a hybrid Panel/Room discussion. Encouraging everyone to contribute with their experiences and any issues they may have found so far in their migration process.

Tuesday, November 7 – 1:30 – 3:00 pm - (90 CPE Minutes)

CR-ALL

Customer Delight 2.0: Thriving In The Dynamic Tech Universe!

Room: Royal 2/3

Chris Isbell – Martin & Associates, Cincinnati, OH

Jim Norton - GRF CPAs & Advisors, Bethesda, MD

Garen Stout – Oasis Solutions Group, Louisville, KY

Buckle up and get ready for a thrilling adventure into the world of customer delight! In this dynamic and engaging session, we will uncover the secrets to managing customer expectations like never before. As technology continues to evolve at an unprecedented pace, software resellers and consultants face the exhilarating challenge of meeting ever-changing customer demands. Join us as we embark on a rollercoaster ride of insights and strategies, navigating the twists and turns of the tech universe. Discover how to master the art of exceeding customer expectations, leaving them delighted and coming back for more. Our expert speakers will share real-world examples and practical tips, ensuring you're fully equipped to ride the wave of customer satisfaction. From understanding the latest trends and user behaviors to leveraging cutting-edge tools and techniques, this session promises to be an eye-opening journey. You'll learn to anticipate customer needs, forge lasting relationships, and stay one step ahead in an ever-evolving landscape. Don't miss this opportunity to take your customer satisfaction game to the next level! Join us for an action-packed session that promises to equip you with the skills to excel as a reseller or consultant in today's fast-paced tech world. Get ready to ride the wave of customer delight and leave a lasting mark on your clients!

CAS

Fireside Chat: What Do We Need To Be Successful?

Room: Mirror Lake

Irfan Dossani – Whitley Penn, Dallas, TX

Kane Polakoff – CohnReznick, Farmington Hills, MI

This session would be a reflection of all our discussions thus far and sharing next steps on what we are all walking away with on how we will define success going forward.

ITL-S
ITL Strategic Roundtables
(CIOs only)
Room: Royal 1

Rob Lewis – Rubin Bown LLP, St. Louis, MO

Join the roundtable discussion where we will discuss the ITL Strategic sessions from today and dive a little deeper into some of the topics.

ITL-T
Tactical Roundtables
Room: Majestic 1

Michael Voegtline - Wipfli LLP, Wausau, WI

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!

Tuesday, November 7 – 3:00 – 3:15 pm (No CPE)

Wrap Up Sessions & Adjournment of The ITA Fall Collaborative – GO ITA!

CR
Room: Royal 2/3
Facilitator:

Geni Whitehouse - ITA President, Napa, CA

CAS
Room: Mirror Lake
Facilitators:

Irfan Dossani – Whitley Penn, Dallas, TX
Kane Polakoff – CohnReznick, Farmington Hills, MI

ITL
Room: Majestic 2/3
Facilitator:

Lissa Johnsen - ITA Vice President, Raleigh, NC

NASBA Registry Information

Credit Hours: Up to 14 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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