

Information Technology Alliance

July 21, 2020
through
August 12, 2020

VIRTUAL
2020 ITA COLLABORATIVE



www.italliance.com

MONDAY	TUESDAY	WEDNESDAY	THURSDAY
7/20	7/21	7/22	7/23
	<u>Internal Technology Leaders (ITL)</u> 11:40am-12:00pm EDT: Welcome And Intro 12:00-1:00pm EDT: Privacy Law - The Impact Of One Less "I" 1:15-2:15pm EDT: Are You Experienced? - How And What IT Does For The Client Experience 2:45-3:45pm EDT: IT's Role In Risk Management 4:00-5:00pm EDT: ITL Strategic Roundtable: Data Security And Offshore Personnel	<u>Internal Technology Leaders (ITL)</u> 12:00-1:00pm EDT: Microsoft 365 Security Suite: The Ring Of Truth Or Another Circle Of Fire? 1:15-2:15pm EDT: Security Governance: Prepare To Have Your SOCs Blown Off! 2:45-3:45pm EDT: It CAN Happen To You – What Is Your Incident Response Plan? 4:00-5:00pm EDT: Tactical Roundtables	
7/27	7/28	7/29	7/30
<u>Consultants and Resellers (CR)</u> 11:40am-12:00pm EDT: Welcome and Intro 12:00-1:00pm EDT: COVID-19 And Connecting With Partners 2:45-3:45pm EDT: Competition Is For Losers! 7:00-8:00pm EDT: Virtual Wine Tasting (optional)	<u>Consultants and Resellers (CR)</u> 12:00-1:00pm EDT: Virtual Presentation Best Practices 1:15-2:15pm EDT: Herding Cats In A Dog-Eat-Dog World 2:45-3:45pm EDT: Executing A Winning Marketing Strategy In The New Normal 4:00-5:00pm EDT: Ignite!	<u>Consultants and Resellers (CR)</u> 12:00-1:00pm EDT: Subscription Service Offerings In A CR Practice 1:15-2:15pm EDT: Master Your Impact! How Presentation Skills & Body Language Can Drive Success 2:45-3:45pm EDT: Say it Like You Mean It 4:00-5:30pm EDT: CR Roundtables	
8/3	8/4	8/5	8/6
8/10	8/11	8/12	8/13
THE SESSSIONS THIS WEEK ARE 'INVITATION ONLY' FOR LARGE CPA FIRM CIO'S AND THEIR INNOVATION LEADERSHIP TEAM	<u>Large CPA Firm Innovation Summit</u> 11:40am-12:00pm EDT: Welcome And Intro 12:00-1:00pm EDT: How Are You Defining Innovation And Integrating It With Your Strategy? 1:15-2:15pm EDT: Creating New Revenue Streams Through Innovation 3:00-4:00pm EDT: Integrate to Automate – Best Practices For Systems Development	<u>Large CPA Firm Innovation Summit</u> 12:00-1:00pm EDT: Innovation Collaboration Between Our CPA Firms - What's Viable And What Isn't? 1:15-2:15pm EDT: Implementing Innovation - Reducing Friction, Eliminating Barriers And Measuring Success 3:00-4:00pm EDT: Innovation Summit Open Roundtables	

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Session Descriptions and Speakers

Note: Times are all Eastern

Consulting & Reselling – CR
Large Firm Innovation Summit - IS

Internal Technology Leader – ITL

Tuesday, July 21 - Internal Technology Leaders

11:40 am – 12:00 pm Eastern

President's Welcome & Introductions

Shawn P. Slavin – ITA President, Owasso, OK

ITA President will introduce our Virtual ITL Collaborative Committees and welcome our new members and guests. He will also provide an overview of the Virtual Collaborative agenda and help navigate our Virtual Environment.

12:00 – 1:00 pm Eastern (60 Minutes)

Privacy Law - The Impact Of One Less "I"

Moderator:

Shawn M. Gerlach – CLA, Greenwood Village, CO

Panelists:

Steven Cook – HCVT, Los Angeles, CA

Jack Redfield – Cherry Bekaert LLP, Richmond, VA

Andrew Thayil – DHG, High Point, NC

IT Teams have built Governance Policies and Models around protecting PII. Recent Privacy Laws have removed one of the "I's" (from PII) forcing IT to think about data differently and on a broader scale. Join us for a panel discussion that focuses on impact of one less "I" & IT's responsibilities in meeting requests to exercise an individual's rights granted under privacy laws such as GDPR & CCPA.

1:15 – 2:15 pm Eastern (60 Minutes)

Are You Experienced? - How And What IT Does For The Client Experience

Moderator:

JD Stotts – Whitley Penn, Fort Worth, TX

Panelists:

Paul Blowers – Plante Moran, Southfield, MI

Michael Connell – CLA, Middleton, WI

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

Joe Wilson – Workday, Inc., Frisco, TX

Do your clients just have a transaction with your firm's technology and security, or do they have a trip worth remembering? In this session, we will focus on our firms' clients/customers who pay the bills and we ultimately serve. We will discuss and dig into the positive and/or negative customer experiences relating to technology, security and privacy especially as regulatory, privacy and world health events force continual change. We technology leaders still need to deliver a consistent, great customer interaction and experience. So, let's join up to hear and interact with a panel of your C* level peers as we find out how and what we can do to give our customers the ultimate high – a world class experience.

2:45 – 3:45 pm Eastern (60 Minutes)

IT's Role In Risk Management

Roundtable Discussion

Facilitator:

Amel Edmond – WithumSmith+Brown, Red Bank, NJ

Every CIO faces a never-ending onslaught of challenges. How effective we are in addressing these challenges is greatly dependent on the level of risk management we establish in our firms. In this session, we will discuss what IT's role is in managing risk.

Risk management does not just lie with IT. How are your fellow ITA CIO's addressing the herd of elephants in the room when it comes to risk? What is the proper role for IT in the overall management of risk? How does IT become seen as a facilitator and strategic partner for other teams and departments? Today, many see IT as 'Department: Zap', not as 'Department: Zoom!'

4:00 – 5:00 pm Eastern (60 Minutes)

ITL Strategic Roundtable: Data Security And Offshore Personnel

Steven Cook – HCVT, Los Angeles, CA

Many CPA firms are expanding their global presence. They want offshore personnel to effectively collaborate with onshore personnel, but ever increasing regulatory, security and privacy requirements create challenges to open data sharing. During this roundtable, firms will share how they are managing security to balance these competing needs.

Wednesday, July 22 - Internal Technology Leaders

12:00 – 1:00 pm Eastern (60 Minutes)

Microsoft 365 Security Suite: The Ring Of Truth Or Another Circle Of Fire?

Moderator:

Dee Dutton – Whitley Penn, Fort Worth, TX

Panelists:

Garrett Schrader – Crowe LLP, Chicago, IL

Others TBD

As more and more firms move to 365 in the cloud or on Premise, the need to incorporate and/or navigate the security platform available through Microsoft EMS becomes more and more prevalent. Join our panelists as they discuss how Microsoft EMS is being implemented in the business and share some of the benefits and pitfalls associated with EMS.

1:15 – 2:15 pm Eastern (60 Minutes)

Security Governance: Prepare To Have Your SOC's Blown Off!

Moderator:

Chris Morrow – Warren Averett, Birmingham, AL

Speakers:

Dustin Smith – Warren Averett, Birmingham, AL

Scott Pruitt – Warren Averett, Birmingham, AL

Let's face it, none of our firms really need to have a System and Organization Controls (SOC) audit. In this session, we'll talk about the business-driven reasons that may compel you to be SOC compliant, along with the basics of a SOC and real-world experiences by one of our firms that has gone through the process. We will also talk about the new Department of Defense's Cybersecurity Maturity Model Certification (CMMC) that affects defense contractors and subcontractors. Shirt and shoes required; SOC's optional.

2:45 – 3:45 pm Eastern (60 Minutes)

It CAN Happen To You – What Is Your Incident Response Plan?

Moderator:

Jan Milden – Plante Moran, Southfield, MI

Panelists:

Nate Roberts – Wipfli LLP, Eau Claire, WI

John Roman, Jr. – The Bonadio Group, Pittsford, NY

Kurtis VanderWal – Plante Moran, Southfield, MI

In today's complex and ever-changing technology landscape, it is almost inevitable that security incidents will happen. Having a plan to respond to incidents and being prepared to protect staff, clients and their data is a critical part of any firm's security processes. In this session we will learn:

- How firms define an incident vs. security event vs. network breach vs. data breach
- What fundamental steps a firm can take to protect itself from incidents
- What firms are doing to detect incidents as they happen
- How firms are planning incident response and what steps they are putting in place to allow them to react quickly
- What roles beyond IT are included in the incident response plan
- How firms handle vendor incidents when client data could be impacted
- How and when we should plan to communicate with staff and clients in the case of an incident

4:00 pm -5:00 pm Eastern (60 Minutes)

ITL Tactical Roundtables

The ever-popular ITL Tactical Roundtables for this 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** – *Grant Rufus, Eide Bailly LLP, Fargo, ND*
- **Infrastructure/Engineering** – *Edward F. Kim, HCVT, Los Angeles, CA*
- **Service Delivery, Metrics and Support** – *Scott Pruitt, Warren Averett, Birmingham, AL*
- **Project Management** – *Kevin Fraase, Eide Bailly LLP, Fargo, ND*
- **Security/Compliance** – *Paul Olson, Eide Bailly LLP, Fargo, ND*

Monday, July 27 – Consultants & Resellers (CR)

11:40 am – 12:00 pm Eastern

President's Welcome & Introductions

Shawn P. Slavin – ITA President, Owasso, OK

ITA President will introduce our Virtual CR Collaborative Committees and welcome our new members and guests. He will also provide an overview of the Virtual Collaborative agenda and help navigate our Virtual Environment.

12:00 – 1:00 pm Eastern (60 Minutes)

COVID-19 And Connecting With Partners

Moderators:

Patty Benitez – American Payment Systems, Chicago, IL

Todd Perlman – Business Technology Partners, LLP, Deerfield, IL

Want to get the most from ITA? Come talk to the other nerds! Manifesting the ITA value proposition that "Knowledge Increases In Value When It Is Shared," this session will give you the skills to approach other people, exchange ideas, and build community (aka networking). You will learn to overcome your fear of approaching strangers and asking them for things. Get some practice networking within the ITA community before you have to do it in the real world. Great for newbies, shy people, and introverts. Bring your business cards. This session will be fun and highly interactive! Expect to learn something from everybody in the room.

2:45 – 3:45 pm Eastern (60 Minutes)

Competition Is For Losers!

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

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

The title is an expression made famous by Peter Thiel, a co-founder of PayPal. His point was to find segments of the market where you can have uncontested access to customers and fuel growth. This is a common theme in many startup strategies from Crossing the Chasm to Blue Ocean Strategy. For each book that is published, the key to growth and competitive advantage is in the marketing strategy. What segments of the market are you going after? What is your position in those segments? What should your strategy be as a result? The battle for customers starts with mindshare. The market doesn't care about table-stakes. The market cares about differentiation. So why you? Come to this session and learn a framework for defining and promoting your differentiation.

Monday, July 27, 7:00 pm Eastern – Virtual Wine Tasting - Optional

Tuesday, July 28 – Consultants & Resellers (CR)

12:00 – 1:00 pm Eastern (60 Minutes)

Virtual Presentation Best Practices

Julie Fitzpatrick – Lighthouse Pt, FL

Todd Perlman – Business Technology Partners, LLP, Deerfield, IL

This session will show you how to make the most of your virtual presentation platform to ensure your meetings go smoothly and you put your best foot forward! We will also cover best practices and tips & tricks for two of the most popular virtual presentation tools: Microsoft Teams and Zoom. From basic security measures when scheduling and conducting meetings to how to look best in front of the camera.

Part 1 - Overall Best Practices

Part 2 - Tips & Tricks for Microsoft Teams

Part 3 - Tips & Tricks for Zoom

1:15 – 2:15 pm Eastern (60 Minutes)

Herding Cats In A Dog-Eat-Dog World

Moderator:

Walter Goodfield – RKL eSolutions LLC, Lancaster, PA

Panelists:

Kim Austin – Intuit, Irvine, CA

Stacy Schuettler – LBMC Technology Solutions, Brentwood, TN

"Employees are our greatest asset!" We hear it all the time, but, what does it mean? Many organizations aspire to that statement but how do they foster employee success? Without the efforts of dedicated people and a strong culture, how can we serve our clients, increase revenue and sustain growth? Learn from a panel of successful leaders how to create a workplace built on trust, respect and focused on results. Key talking points include:

- Working with multi-generational teams
- Managing remote employees
- Coaching and focusing on results
- Engaging underperformers

2:45 – 3:45 pm Eastern (60 Minutes)

Executing A Winning Marketing Strategy In The New Normal

Moderators:

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

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

Panelists:

Liz Anderson – APS Payments, Mesa, IL

Darcy Boerio – DAB Partners, Brandon, FL

What is different now in marketing and how can you adapt your strategy in our current business environment? This session will be a discussion on tactical areas of focus. The points for discussion will include:

- Why now is not the time to cut your marketing budgets.
- The importance of keeping your sales and marketing teams aligned.
- The ability to identify areas in your marketing spend which can be used more efficiently.
- Where to focus your marketing tactics.

The goal of this session is to provide you with three tactics to implement immediately.

Tuesday, July 28 – Ignite!

4:00 – 5:00 pm Eastern

IGNITE!

Moderator:

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 a 5-minute presentation about something personal or professional 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!

Wednesday, July 29 – Consultants & Resellers (CR)

12:00 – 1:00 pm Eastern (60 Minutes)

Subscription Service Offerings In A CR Practice

Moderator:

Dom Pernai – ETHOSystems, Chicago, IL

Igal Rabinovich – Net at Work, New York, NY

Panelists:

Ron Baker – VeraSage Institute, Petaluma, CA

Ed Kless – Sage, Allen, TX

Dr. Paul Thomas – Plum Health DPC, Detroit, MI

Matthew Burgess – View Legal Brisbane, Australia (Video Presentation Only)

Most of you are already experts in pricing and selling subscription software products. In this session, we will explore pricing those products to include services. In a new world where upgrades are automatic and phone support is no longer offered by the publisher, how can CR firms sell these services successfully. Come and hear from subscription pricing experts:

- How to set proper customer expectations
- Implementation concerns
- How to identify additional revenue opportunities
- Customer system reviews
- Pricing these services

1:15 – 2:15 pm Eastern (60 Minutes)

Master Your Impact! How Presentation Skills & Body Language Can Drive Success

April Blankenship – Altec, Laguna Hills, CA

Lynn Henslee – e2b teknologies, Inc., Chardon, OH

Presenting doesn't have to be scary, or something you seek to avoid. During a Sales Demo, client meetings, or just internally how you present matters and can dramatically affect the outcome. Find opportunities to practice the tips and techniques presented in this session and become more confident in your ability to present to any audience. You owe it to yourself, and your organization, to develop the skills you need to present your ideas clearly, purposefully, engagingly, and confidently.

In this session you will learn:

- The difference between presenting online vs in person
- Tips and tricks for effective software demos
- How to prepare for your audience and what not to say
- Surviving the Awkward Silence

2:45 – 3:45 pm Eastern (60 Minutes)

Say It Like You Mean It

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

Julie Fitzpatrick – Lighthouse Pt, FL

Do you feel like you are constantly putting out employee and customer fires? Whether you are Coaching, Mentoring, Negotiating, Providing Feedback, or Resolving Conflicts, they all rely on the same foundation: communication. Join us for an interactive group discussion where we will discuss how to improve communication skills and practice exercises.

- Understand how to communicate to different personality styles
- Recognize Barriers to Communication
- Practice Empathetic Listening Skills
- Create Clear and Effective Messages

4:00 – 5:30 pm Eastern (90 Minutes)

CR Roundtables

Todd Perlman – Business Technology Partners, LLP, Deerfield, IL

Tuesday, August 11 – Large CPA Firm Innovation Summit (IS)

**** By Invitation Only – For CIOs and Designated Leaders ****

Tuesday

11:40 am – 12:00 pm Eastern

President's Welcome & Introductions

Shawn P. Slavin – ITA President, Owasso, OK

ITA President will introduce our Virtual Innovation Summit Committees and welcome our guests. He will also provide an overview of the Virtual Innovation Summit agenda and help navigate our Virtual Environment.

Tuesday

12:00 – 1:00 pm Eastern (60 Minutes)

How Are You Defining Innovation And Integrating It With Your Strategy?

Moderator:

Derek A. Bang – Crowe LLP, Indianapolis, IN

Panelists:

Matthew Armanino – Armanino LLP, San Ramon, CA

Alan Atwell – RSM US, LLP, Charlotte, NC

Brett W. Krug – BKD, LLP, Springfield, MO

Many firms have different definitions for “innovation”. These definitions range from and include digital transformation of core services, development of new revenue streams, new business models, differentiated customer experience, etc. This session will share the definitions and views of innovation from a panel of firm leaders. There will also be discussion of how innovation fits into overall firm strategies and the related structure to support innovation and strategy.

Tuesday

1:15 – 2:45 pm Eastern (60 Minutes)

Creating New Revenue Streams Through Innovation

Geralyn Hurd – Crowe LLP, Oak Brook, IL

Peter J. Scavuzzo – Marcum LLP, New York, NY

Over the last several years, many firms were trying to transition away from a traditional compliance model to one much more heavily leaning towards business advisory. There are many roads to achieve this transition, one being a more significant investment in innovation and transformation. Unfortunately, without transitioning a strategy to one that creates a new digital revenue stream, firm leadership may be more reserved moving forward.

In our sessions, we will be making a case that an annuitized digital revenue stream, through a product or solution approach, even under the circumstance where compliance is propping our firms up, can be enough of a motivator for senior leadership to continue supporting these initiatives and invest going forward. In fact, with the right approach, there may be an even deeper desire and urgency to push ahead.

Through a couple of real-world cases studies, participants will be able to hear how their peer firms have tackled the investments and risks around digital revenue generation and provide some examples of approaches and steps they can take back to their organization.

The session will touch on these areas:

- How do you choose a new digital revenue stream?
- How do you annuitize digital revenue?
- Should there be an expected ROI
- What kind of funding expectations should there be?
- How can digital revenue propel you ahead of your peers?
- What to consider in TCO of a product/solution?
- When do you decide to build vs. buy?

Tuesday

3:00 – 4:00 pm Eastern (60 Minutes)

Integrate to Automate – Best Practices for Systems Development

Alan Atwell – RSMS US, LLP, Charlotte, NC

Joe Miles – CBIZ, Inc., Independence, OH

Artificial intelligence has all the hype, but what’s really driving automation opportunities today? Why it’s no other than the API! API’s turn 20 years old this year, but innovation continues to evolve as this technology enables the exchange of value between businesses. Accounting firms’ relationships with software providers are no exception as increasingly connected systems enable significant efficiencies. After this session you will be able to:

- Understand how firms are working with key software vendors to use APIs most effectively
- Understand tips for managing the pitfalls of integrated systems
- Understand how other firms manage the impact of automation on their practices

Wednesday, August 12 – Large CPA Firm Innovation Summit (IS)

**** By Invitation Only – For CIOs and Designated Leaders ****

Wednesday

12:00 – 1:00 pm Eastern (60 Minutes)

Innovation Collaboration Between Our CPA Firms - What's Viable And What Isn't?

Facilitator: *Yassir Karam, CLA, Indianapolis, IN*

Paul Blowers – Plante Moran, Southfield, MI

John Bowles – DHG, Charlotte, NC

Innovation requires investments and risk taking. For years, firms discussed how collaboration could mitigate some of these risks. More than ever, firms are willing to entertain collaboration initiatives. This roundtable session will discuss the appetite firms have to work together to develop new technologies.

Attendees will discuss topics such as:

- What kind of projects are more conducive to collaboration between firms?
- What are the keys to success?

Participants in these roundtables will leave with a few of the following takeaways that you can apply to your firm:

- Understand interest in collaboration between firms
- Understand possible areas of collaboration

Wednesday

1:15 – 2:15 pm Eastern (60 Minutes)

Implementing Innovation - Reducing Friction, Eliminating Barriers, And Measuring Success

Facilitator: *Robert Jamison, Elliott Davis, LLC, Greenville, SC*

Russ Ahlers – BDO USA, LLP, Grand Rapids, MI

Mike Denno – Rehmann, Saginaw, MI

Change has changed! Let's face it, change is coming at us faster; it is more daunting and complex and there is just more of it. Firms have run into a variety of issues that have slowed down the implementation of innovation or change. Can we get past the friction change barrier and, if so how? We recognize most barriers: people, process, regulation, money, time, talent. But, is something bigger holding us back? How do we ensure true adoption once a product or process has been rolled out – how do we measure success? This session will explore a few case studies in detail learning how a change was implemented, lessons learned, and adjustments made to ensure adoption. We will also discuss key roles/team structure and how these affected and supported the desired outcomes. Join this session to better understand barriers to change and learn from others about new ways to navigate challenges.

Attendees of this session will leave with a better understanding of change and will be able to :

- Define and gain awareness of unseen barriers
- Develop new understandings and ways to react
- Understand organizational structure and roles
- Explore what data/information should I collect now to measure success
- Identify new ways to measure success
- Develop strategies to embrace change
- Have more focused team members
- More productive teams
- Better visibility to financial outcomes

Wednesday

3:00 – 4:00 pm Eastern (60 Minutes)

Innovation Summit Open Roundtables

Moderated Group Discussion with Small Group Roundtables

Shawn P. Slavin – ITA President, Owasso, OK

At this wrap up session, Summit participants will provide their feedback on this meeting and discuss ideas for future Innovation Summit sessions. We'll also provide time to break the group into open discussion roundtable sessions, where participants can further interact with their peers and discuss any outstanding topics that may be on their mind as a result of attending this year's Innovation Summit. Summaries from each roundtable group will be collected and distributed to all of the summit attendees following the meeting.

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NASBA Registry Information

Credit Hours: Up to 28 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 two tracks of educational content: IT Software Consulting (Sales, Support and Implementation) and Internal IT for large CPA Firms. 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

Delivery - This event is a Group Study Live CPE program and **delivered online due to Covid-19** in accordance with the NASBA / AICPA Statement on Standards for Continuing Professional Education (CPE) for the National Registry of CPE Sponsors.

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 PE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Administration

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