



April 21-23, 2024  
Hyatt Regency St. Louis at The Arch, St. Louis, Missouri



**Sunday, April 21**

2:30 PM	5:00 PM	<b>BADGE PICKUP</b> - Grand Ballroom Foyer
3:30 PM	4:30 PM	<b>MEET, EAT AND GREET</b> - Park View Room Session to meet New Members and First Timers
4:30 PM	6:00 PM	<b>ITA GENERAL SESSION</b> - Grand D/E President's Welcome - <b>Geni Whitehouse</b> KEYNOTE: Life Beyond Fear - <b>Mark Mathews</b>
6:00 PM	7:30 PM	<b>SUNDAY NIGHT WELCOME RECEPTION</b> - Grand Foyer
7:30 PM		Dinner On Your Own and Various Partner Events

**Monday, April 22**

7:00 AM	5:00 PM	<b>BADGE PICKUP</b> - Grand Foyer				
7:00 AM	8:00 AM	<b>BREAKFAST</b> - TBD				
8:00 AM	9:30 AM	<b>GENERAL SESSION</b> - Grand D/E ITA's Leadership Alliance (ILA) Graduation - <b>Geni Whitehouse</b> KEYNOTE: The Landscape Of AI Innovation - <b>Noelle Russell</b>				
<b>ROOM LOCATION</b>		Grand D	Grand E	Grand B/C	Grand F/G	Grand A
10:00 AM	12:00 PM	<b>WORKSHOP 1</b> The Future Of AI In Your Industry <b>Noelle Russell</b>	<b>WORKSHOP 2</b> The Next Wave <b>Mark Mathews</b>	<b>WORKSHOP 3</b> Negotiation & Conflict Types: Engagement Tactics Plus Negotiation Excellence: How To Make Better Decisions Through Negotiation Skills <b>Joanna Shea</b>	<b>WORKSHOP 4</b> Remaining Relevant In Transformative Times: How To Manage Change, Lead The Future And Upgrade Yourself And Your Firm <b>Rishad Tobaccowala</b>	None Planned
12:00 PM	1:15 PM	<b>LUNCHEON</b> - TBD				
1:15 PM	3:15 PM	<b>WORKSHOP 1</b> The Future of AI in Your Industry <i>(continued)</i>	<b>WORKSHOP 2</b> The Next Wave <i>(continued)</i>	<b>WORKSHOP 3</b> Negotiation & Conflict Types: Engagement Tactics Plus Negotiation Excellence: How To Make Better Decisions Through Negotiation Skills <i>(continued)</i>	<b>WORKSHOP 4</b> Remaining Relevant In Transformative Times: How To Manage Change, Lead The Future And Upgrade Yourself And Your Firm <i>(continued)</i>	None Planned
<b>TRACKS &amp; SESSIONS</b>		<b>CONSULTING &amp; RESELLING (CR)</b>		<b>CLIENT ACCOUNTING SERVICES (CAS)</b>	<b>INTERNAL TECH LEADERS (ITL)</b>	
		<b>CR TRACK 1 &amp; COMBINED</b> Grand B/C	<b>CR TRACK 2</b> Grand F/G	Grand E	<b>ITL TACTICAL</b> Grand D	<b>ITL STRATEGIC</b> Grand A
3:30 PM	5:00 PM	Reporting, Analytics, KPIs And Other Aspects Of Measuring Results In Our Own Businesses	Presales American Idol Style	Pathways To Purpose – Go From Passion To Profession	ITL Tactical Roundtables	ITL Strategic Roundtables: Will Artificial Intelligence Make Us Dumber?
5:00 PM	6:00 PM	None Planned		"IT and CAS walk in to a bar..." A Discussion on How IT and CAS Can Better Collaborate and Crack the Code on Client Success Grand E <i>(Beverage Service)</i>		
6:00 PM	9:00 PM	<b>"A TASTE OF ST. LOUIS UNDER THE ARCH" PARTY and DINNER</b> - Gateway Terrace 18th Floor <i>You don't want to miss this!</i>				

**Tuesday, April 23**

7:00 AM	8:00 AM	<b>BREAKFAST</b> - TBD				
<b>TRACKS &amp; SESSIONS</b>		<b>CONSULTING &amp; RESELLING (CR)</b>		<b>CLIENT ACCOUNTING SERVICES (CAS)</b>	<b>INTERNAL TECH LEADERS (ITL)</b>	
		<b>CR TRACK 1 &amp; COMBINED</b> Grand B/C	<b>CR TRACK 2</b> Grand F/G	Grand E	<b>ITL TACTICAL</b> Grand D	<b>ITL STRATEGIC</b> Grand A
8:00 AM	9:15 AM	Protecting Value In Fixed Fee Engagements	Navigating Accountability In Software Implementation: Strategies For Successful Project Delivery	Creating A Roadmap For New Technology Implementations	Famous Last Words: "We Should Really Get This Documented" - How Are We Documenting and Sharing Knowledge Throughout Our Organizations?	You Got Apps to the Left, Apps to the Right – And You're the Only Techie In Town
9:30 AM	10:45 AM	Feedback Finesse: A Theatrical Dive into Vibrant Employee Dynamics	Passing The Torch: Empowering The Next Leaders Of Your Business	Applying The Roadmap For New Technology Implementation	Techie Whisperer: Decoding The Soft Skills In A Hard Drive World	Business Without Borders: Architecting Global Organizations In The Digital Era
11:00 AM	12:15 PM	Turning Technicians Into Consultants	What Are You Actually Incentivizing? Re-thinking Incentive Structures From The Employee Mindset	Forging New Paths: Effective Firm Advocacy In CAS	Do You Want Security With That Identity?	Embracing The AI Evolution And Empowering Our People
12:15 PM	1:30 PM	<b>LUNCHEON</b> - TBD				
1:30 PM	2:30 PM	ERP Evolution: Navigating Change And Welcoming The Next Generation - Grand B/C		Fireside Chat, Roundtable CAS Wrap Up	ITL Strategic & Tactical Roundtable Discussion - Unleashing Tech Talent: The Art of Becoming Indispensable Grand D	
2:30 PM	3:15 PM	Wrap Up Session - ALL Tracks Grand D				

**Wednesday, April 24**

8:30 AM	3:00 PM	<b>ITA Leadership Alliance (ILA) Base Camp</b> - Gateway West 18th Floor <i>(Note: Separate Registration Required)</i>
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## Session Descriptions and Speakers

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

**Sunday, April 21 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)**

**4:30 – 4:45 pm**

### **President's Welcome**

**Room: Grand D/E**

***Geni Whitehouse – ITA President, Napa, CA***

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

**4:45 – 6:00 pm (75 CPE)**

### **KEYNOTE: Life Beyond Fear**

**Room: Grand D/E**

***Mark Mathews – Award Winning Keynote Speaker, Queensland, Australia***

Through his career as a professional 'Big Wave' surfer and Red Bull Athlete, Mark Mathews has become obsessed with the relationship between personal growth, high performance and fulfilment. This Life Beyond Fear keynote Mark takes the audience through deconstructed, fine-tuned, and personalized emotion and resilience techniques that help successfully strengthen one's mindset and sustain long term performance.

**Monday, April 22 – 8:00 to 9:30 am - Monday Morning General Session & Keynote (60 CPE Minutes)**

**8:00 – 8:20 am**

### **ITA's Leadership Alliance (ILA) Graduation – Class of 2023**

**Room: Grand D/E**

***Geni Whitehouse – ITA President, Napa, CA***

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

ITA President Geni Whitehouse will present the 2023-2024 Class of the ITA's Leadership Alliance (ILA) with their graduation certificates.

8:30 – 9:30 am (60 CPE Minutes)

## KEYNOTE: The Landscape Of AI Innovation

Room: Grand D/E

**Noelle Russell – Multi Year-Award Winner in AI for Companies: Microsoft, IBM, NPR and More**

An overview of current trends and the importance of Inclusive innovation. In this session, renowned AI leader Noelle Russell takes a look at how specific industries are evolving due to the implementation of generative and applied AI technologies. As Russell gets groups thinking about AI and how it can be leveraged in support of their business goals, she shares real-life case study applications that demonstrate more than a dozen applied AI models that can be leveraged to optimize business, create game-changing solutions, and power growth. As Russell examines the opportunities that AI presents for organizations, she also considers the risks, challenges, and ethical considerations — focusing in depth on how AI can be implemented to support human ingenuity, rather than replace it. If your organization is looking to successfully expedite innovation and improve the accessibility of its applications, this program is the perfect starting point.

## Deep Dive Workshops

Monday, April 22 - 10:00 am to 3:15 pm (with lunch from Noon to 1:15) – (240 CPE Minutes)

### Workshop 1

#### The Future Of AI In Your Industry

Room: Grand D

**Noelle Russell – Multi Year-Award Winner in AI for Companies: Microsoft, IBM, NPR and More**

In this session, renowned AI leader Noelle Russell takes a look at how specific industries are evolving due to the implementation of generative and applied AI technologies. As Russell gets groups thinking about AI and how it can be leveraged in support of their business goals, she shares real-life case study applications that demonstrate more than a dozen applied AI models that can be leveraged to optimize business, create game-changing solutions, and power growth. As Russell examines the opportunities that AI presents for organizations, she also considers the risks, challenges, and ethical considerations — focusing in depth on how AI can be implemented to support human ingenuity, rather than replace it. If your organization is looking to successfully expedite innovation and improve the accessibility of its applications, this program is the perfect starting point.

Topics to include:

- Ethical Foundations in AI
- Scaling Inclusive AI
- Design Thinking for AI
- Envisioning the Future

### Workshop 2

#### The Next Wave

Room: Grand E

**Mark Mathews – Award Winning Keynote Speaker, Queensland, Australia**

The Next Wave is a video-based choose-your-own-adventure teaming session that follows the exciting career of professional big-wave Surfer, Mark Mathews and his team.

In the ocean, you must stay hypersensitive to change, continually reassessing conditions and refocusing goals and strategies. This creates a great environment to explore team dynamics, leadership, communication, and the values that underpin your company's success.

The audience is grouped into professional surf teams, including the roles of photographer, swell forecaster, water safety crew, manager, publicist, and surfer. You'll be transported out into the ocean (virtually) where you will face a series of exciting scenarios, have to make difficult decisions, and either reap the rewards or face the consequences of those decisions.

After a brief immersion into the business of Big Wave Surfing, you and your team will take the reins of Mark's career. You'll be faced with a series of real-life scenarios from Mark's career. Each scenario will leave you with two options. As a team, you will make your decision, watch the outcomes, and then get your results.

### Workshop 3

#### Negotiation & Conflict Types: Engagement Tactics Plus Negotiation Excellence: How To Make Better Decisions Through Negotiation Skills

Room: Grand B/C

**Joanna Shea: CEO and Co-Founder of the Negotiations Collective**

The first part of the Workshop will be on Negotiation & Conflict Types and Engagement Tactics. Skilled negotiators know their natural negotiation and conflict style, can identify their counterparts, and can adjust their own to mirror, soften, or push their counterparts for the best results. In this two-hour session, the NC will train attendees in:

- Identification of one's natural negotiation and conflict type
- How to identify a counterpart's natural negotiation and conflict type
- The pros and cons to each type
- When to deploy each type
- The results each type will likely achieve
- Techniques required to get the best out of each type
- Engagement tactics used by skilled negotiators, and how to react in kind

The second part will be on Negotiation Excellence: How to make better decisions through negotiation skills. No two negotiations are the same. Political (internal or external), economic, cultural, environmental, personal and or a variety of other factors will present themselves in diverse ways in different negotiations. You cannot control these variables, no matter how talented a negotiator you are. This second two-hour session will deliver training on how to prepare, push your value proposition, how you present yourself as a negotiator, and how you offer acceptable solutions that create more value.

Key learning points will include:

- Strategic Networking
- Value Creation
- Process
- Planning
- Teams
- Strategy

Prepare for MORE. More trust. More opportunity. More confidence. More value.

### Workshop 4

#### Remaining Relevant In Transformative Times: How To Manage Change, Lead The Future And Upgrade Yourself And Your Firm

Room: Grand F/G

**Rishad Tobaccowala – Rishad Tobaccowala LLC – Chicago, IL**

**Author, Speaker, Teacher and Advisor For Four Decades**

In this session, Rishad will lead an interactive workshop playing built around understanding the four big shifts impacting every business, discuss how to apply the six keys to unlocking change. We will then discuss how best to lead on a world of debossification and how we all can continue to upgrade our mental operating systems. Rishad's best-selling book "Restoring the Soul of Business: Staying Human in the Age of Data" was published globally by HarperCollins and focusses on helping people think, feel, and see differently about how to grow their companies, their teams and themselves in transformative times. Tobaccowala was named by BusinessWeek as one of the top business leaders for his pioneering innovation and TIME magazine dubbed him one of five "Marketing Innovators". He is in the Ad Age Interactive Hall of Fame and has received a lifetime achievement silver medal award from the Chicago Ad Federation, an Inspire Award for motivating and building talent from the Advertising Education Foundation and the Association of National Advertisers and was named an Advertising Legend by the Advertising Club of New York. Rishad is also chairman of The Tobaccowala Foundation, which helps over 10,000 people gain better access to health and education in India. Tobaccowala holds a bachelor's degree in mathematics from the University of Bombay and an MBA from the Booth School of Business at the University of Chicago with which he remains closely involved.

## Concurrent Sessions – By Date and Time

**Monday, April 22 – 3:30 to 5:00 pm - (90 CPE Minutes)**

## **CR-1**

### **Reporting, Analytics, KPIs And Other Aspects Of Measuring Results In Our Own Businesses**

**Room: Grand B/C**

***Robert Gaby - RKL eSolutions LLC, Colorado Springs, CO***

Knowledge increases in value when shared! Join your fellow ITA business leaders for a lively facilitated discussion geared to uncover the best reports, analytics and key performance indicators (KPI's) to measure past and future performance. The session will include several round table discussions centered on reports and analytics used to:

- Evaluate marketing effectiveness
- Forecast product and service revenue
- Evaluate operational efficiency and productivity
- Gauge customer satisfaction and retention
- Gauge employee satisfaction and retention
- Identify potential risks or threats to the business

In addition to identifying the best of the best analytics and KPI's, the discussions will include tools firms are using to collect, develop and present this data in a meaningful way. Round tables will focus on doing a deep dive on two or three reporting areas and will report their findings back to the group. Participants are certain to take away new metrics they can incorporate into their current reporting; refinements to their existing analytics and reports; and/or new tools to create and develop reports for their business.

## **CR-2**

### **Presales American Idol Style**

**Room: Grand F/G**

#### **Facilitators:**

***Moira Goggin - DSD Business Systems, Long Beach, CA***

***Julian Schrenzel - DyNexus Recruiting & Staffing, Seattle, WA***

#### **Panelists:**

***Mike Duberstein - Presales Leader LLC, Lancaster, PA***

***Rebecca Munson – EisnerAmper, Minneapolis, MN***

***Jim Norton - Intellitec Solutions, LLC, Newark, DE***

***Misty Palek - Palek Consulting, Slater, IA***

CR and CAS audience volunteers vie for prizes by presenting a presales pitch to a panel of judges (the prospect) needing a new solution or service. In this interactive session, we'll see who's off-key and who hits the high notes. Participants vote 'Idol Style' while Judges reveal what pitch rang their bells and scored an encore. Amazing tech prizes for the top performers! Everyone has a role in this lively session of insightful presales counterpoint. Keep your ear out to learn what strikes the right note for a perfectly fine-tuned pitch, or even better, get up and do it YOURSELF!

Learning Objectives:

- Presentation styles
- Presentation skills that resonate with prospects/customers
- Identifying solutions quickly
- Understanding Customer Wants vs. Needs

## CAS

### Pathways To Purpose – Go From Passion To Profession

Room: Grand E

*Jessica E. Barnas - Wipfli LLP, Aurora, IL*

*Kimberly K. Blascoe – CPA.com / AICPA, NY, NY*

*Arna Erazo – GHJ, Los Angeles, CA*

*Kane Polakoff – CohnReznick, Farmington Hills, MI*

*Rachel Wehrman - Elliott Davis LLC, Charleston, SC*

Clearly established roles create accountability, allowing for a transparent and traceable process. A structured approach to roles enables the identification of client needs and ensures that advisory services can be tailored to meet the unique requirements of your client, enhancing the value provided. In this 90-minute working session, we delve into the details of a CAS roles and responsibilities matrix that can be utilized in practice to align team skills, responsibilities, and growth trajectory for career paths.

This session will empower you to optimize your approach to staffing, and plan for next steps as your practice grows and evolves in the advisory space.

Learning Objectives:

- Explore and interpret the defined roles and responsibilities of CAS in a practice matrix
- Recognize how the CAS roles and responsibilities matrix applies to their own practice
- Use the roles and responsibilities matrix to indicate how staff will matriculate through the levels by upskilling, demonstrating proficiency at each level

## ITL-T

### ITL Tactical Roundtables: The IT Personnel Factor

Room: Grand D

*Daniel Johnson – Carr, Riggs & Ingram, LLC, Harlingen, TX*

Boots on the ground discussion ranging from staffing levels and burn out to departmental management and skills expectations.

## ITL-S

### ITL Strategic Roundtables: Will Artificial Intelligence Make Us Dumber?

Room: Grand A

*Ellen Choi – Aiwyn, Charlotte, NC*

*Nick Fry - CBIZ MHM, LLC, Kansas City, MO*

*John Roman, Jr. - The Bonadio Group, Pittsford, NY*

*Kevin Sexton - Cohen & Company, Cleveland, OH*

One of the promises of AI is it can augment human capabilities by automating repetitive tasks and sifting through vast amounts of data. Through automation and data analytics AI may allow us to focus on more complex and creative endeavors. However, relying too heavily on AI for basic tasks might reduce our cognitive engagement and critical thinking. Join us in an open, thought provoking discussion aimed at sharing your thoughts, ideas, experiences, and insights into avoiding an “AI Induced Brain Drain”.

**Monday, April 22 – 5:00 to 6:00 pm - (60 CPE Minutes) – With Beverage Service**

## **CAS & CIO/ITL Collaboration**

**"IT And CAS Walk Into A Bar... "**

**A Discussion On How IT And CAS Can Better Collaborate And Crack The Code On Client Success**

**Room: Grand E**

### **Facilitators:**

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

**Greg Landers - CBIZ MHM, LLC, San Diego, CA**

### **Panelists:**

**Sharon Berman – Rehmann, Detroit, MI**

**Nick Cadden – Carr, Riggs & Ingram, LLC, Enterprise, AL**

**Mike Denno – Rehmann, Saginaw, MI**

**Jenni Huotari – Eide Baily, Fargo, ND**

In 2023 the CAS and ITL tracks met together as a group for the first time. This meeting was successful in exposing some of the pain points between IT and CAS. Over the past year many firms have seen growth within their CAS practices and have been working more closely than ever before with their counterparts in IT. This session will focus on how firms have continued to improve communication between both teams as well as optimizing processes and workflows that have eased the struggles identified in 2023. This session's panelists will share stories about how their firms have continued to overcome obstacles between the two teams. Attendees will also have the opportunity to share success from their own firms via live group discussion.

Attendees of this session will learn:

- How CAS groups have been able to accelerate their firms IT acceptance of new technologies
- What practices firms have put into place to improve the balance of speed of technology adoption with IT security and use of corporate resources
- What, if any, role legal should play the CAS/IT acceptance of new technologies

**Tuesday, April 23 – 8:00 to 9:15 am - (75 CPE Minutes)**

## **CR-1**

**Protecting Value In Fixed Fee Engagements**

**Room: Grand B/C**

### **Facilitator:**

**Gary J. Feldman - I-Business Network, Marietta, GA**

### **Panelists:**

**Shawn P. Slavin - SWK Technologies, Inc., Owasso, OK**

**Richard Stellar – Stellar One Consulting, Flower Mound, TX**

**Brian Terrell - BTerrell Group, LLP, Plano, TX**

Customers and service providers have been interested in and dabbling with fixed fee and value-based contracting; however, execution, implementation and adoption remains limited in the marketplace. Resistance comes from a variety of factors which can be overcome to create delighted customers and increase margins.

In this session we will:

- Review processes for determining fees.
- How traditional and new metrics can be used to evaluate performance.
- Discuss contractual terms and tools to protect you and the customer in the new billing paradigm.
- Identify barriers to adoption and methods for overcoming fear of change.

## CR-2

### Navigating Accountability In Software Implementation: Strategies For Successful Project Delivery

Room: Grand F/G

*Clifford Horst - RKL eSolutions LLC, Lancaster, PA*

*Jim Norton - Intellitec Solutions, LLC, Newark, DE*

Join us for an enlightening conference session tailored specifically for software resellers and consultants eager to enhance their project management skills. In this dynamic presentation, we will delve into the crucial aspect of accountability during software implementation. Successfully delivering a project hinges on the ability to manage difficult conversations, establish clear responsibilities, and understand the cause-and-effect relationship between various project elements.

This conference session is a must-attend for software resellers and consultants who are committed to elevating their project management skills and ensuring the success of their software implementations. Be prepared to leave with actionable strategies and a renewed confidence in your ability to establish and stand by accountability throughout the implementation lifecycle.

#### Learning Objectives:

- **Define Effective Communication Strategies:** Participants will learn to identify and employ effective communication strategies when faced with difficult conversations during software implementation, fostering a positive and collaborative team environment.
- **Establish Clear Roles and Responsibilities:** Attendees will acquire practical techniques for defining and communicating clear roles and responsibilities within a project team, minimizing ambiguity and maximizing individual and collective accountability.
- **Understand the Cause-and-Effect Relationship:** Participants will gain a comprehensive understanding of the cause-and-effect relationship between missing deliverables and project timelines. This knowledge will empower them to proactively manage risks, make informed decisions, and keep projects on track.
- **Integrate Expert Insights and Best Practices:** Participants will benefit from the expertise of industry professionals, incorporating their insights and best practices into their project management approach. This will equip them with the tools needed to successfully navigate the complexities of software implementations and ensure project success.

## CAS

### Creating A Roadmap For New Technology Implementations

Room: Grand E

*Nina Chmura – Withum, Princeton, NJ*

*Victoria Pritchard - RKL Virtual Management Solutions, LLC, Exton, PA*

*Jason Reitsma – Sage, Atlanta, GA*

*Sarah Sieman – Marcum LLP, NY, NY*

This session shines a focus on crafting a pragmatic implementation roadmap so that participants can create a structured evaluation process for selecting the right technological tools to meet specific operational needs.

The session will delve into:

- Establishing clear technology objectives aligned with your firm's strategic goals.
- Conducting a needs assessment to identify technological gaps and opportunities.
- Developing criteria for vetting technology based on functionality, integration, scalability, and ROI.
- Creating a decision matrix to objectively evaluate and select technology solutions.
- Outlining a phased implementation plan that includes pilot testing, full-scale rollout, and post-implementation review.

Attendees will leave the session equipped with a customizable framework to assess the suitability of new technologies for their practice, ensuring informed decision-making that can propel their CAS offerings to new heights of efficiency and client service.



## ITL – T

### Famous Last Words: “We Should Really Get This Documented” - How Are We Documenting and Sharing Knowledge Throughout Our Organizations?

Room: Grand D

#### Facilitator:

*Patrick Justice - Elliott Davis, LLC, Greenville, SC*

#### Panelists:

*Sean Grieco – The Bonadio Group, Amhurst, NY*

*Kendrick Hagins – Whitley Penn, Fort Worth, TX*

*Rebecca Miksch – Wipfli, Milwaukee, WI*

Knowledge management is a critical component of running a successful and cohesive organization. From creating a helpdesk knowledgebase article, to large application, database, or infrastructure configurations, how are you making sure this information is shared at the enterprise level, specifically with individuals who “need to know?” In addition to identifying varying best practices, in this session we will discuss what types of information needs to be shared, how this information is disseminated, and how often this information should be updated and reviewed.

We hope you will join us in this interactive session to discuss and learn more about:

- How does your organization share knowledge at the service desk level all the way up to enterprise level? What type of knowledge needs to be shared?
- Does your organization have a knowledge base? If so, what is it? Is your organization using any 3rd party applications or relying on OneNote, SharePoint, or your ITSM? What do you recommend?
- What is your process for creating knowledgebase articles? Are they necessary? Is there a better way to share critical information?

## ITL-S

### You Got Apps To The Left, Apps To The Right – And You’re The Only Techie In Town

Room: Grand A

#### Facilitator /Panelist

*Robert Neill – Weaver, Austin, TX*

#### Panelists:

*Russ Ahlers - BDO USA, LLP, Grand Rapids, MI*

*Morgan Page – Weaver, Houston, TX*

*John Roman, Jr. - The Bonadio Group, Pittsford, NY*

The number of applications that already exists within our firms and the number of emerging applications that are entering the accounting industry market continues to grow. Realizing maximum value from existing investments in technology and guiding our firms on where to invest next in technology to enable efficient growth and expand into new services is a challenge.

In this session, attendees will learn:

- Approaches for how we as IT leaders, engage with practice groups to educate on existing tech
- How to learn about emerging tech in our industry
- How to expose practice leaders to new technology (beyond the software sales pitch)
- Ideas for unlocking the art of the possible for innovating delivery processes.

**Tuesday, April 23 – 9:30 to 10:45 am - (75 CPE Minutes)**

**CR-1**

## **Feedback Finesse: A Theatrical Dive Into Vibrant Employee Dynamics**

**Room: Grand B/C**

**Facilitators:**

**Moira Goggin - DSD Business Systems, Long Beach, CA**

**Jim Norton - Intellitec Solutions, LLC, Newark, DE**

**Panelists:**

**Julian Schrenzel - DyNexus Recruiting & Staffing, Seattle, WA**

**Walter Goodfield - RKL eSolutions LLC, Lancaster, PA**

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

Join us for an engaging and interactive conference session tailored exclusively for software consultants and resellers. In "Performance Play," we take a unique approach to exploring the intricacies of employee feedback through the lens of improvisational skits. Imagine a live, dynamic session where a select group of individuals apply the art of improvisation to act out a series of common feedback scenarios, ranging from positive affirmations to constructive criticisms.

This session goes beyond traditional lecture-style presentations and invites you to participate in a "Who's Line is it Anyway"-inspired experience. Our skilled actors will embody employees, managers, and team members, bringing these scenarios to life in a way that feels both authentic and relatable. Witness firsthand the impact of effective and ineffective feedback delivery and gain valuable insights into the nuances of communication within a professional setting.

But the real magic happens when we turn the spotlight on you—the audience. Following each skit, we open the floor for a lively discussion where you can share your critiques, best practices, and innovative ideas for handling similar situations. This collaborative exchange creates a vibrant learning environment where real-world experiences and diverse perspectives come together to shape a collective understanding of successful feedback strategies.

Don't miss this opportunity to blend learning with entertainment, fostering a community of knowledge-sharing and skill development. "Performance Play" promises an unforgettable session that will leave you equipped with the tools to enhance your role as a software consultant or reseller in the realm of employee feedback.

**Learning Objectives:**

- **Discerning Feedback Nuances:** Participants will develop the ability to recognize subtle nuances in employee feedback scenarios, distinguishing between positive affirmations and constructive criticisms through live skit experiences.
- **Interactive Skill-building:** Attendees will actively engage in constructive discussions, sharing and receiving insights from peers to enhance their understanding of effective communication strategies in the context of employee feedback.
- **Applied Best Practices:** Through the analysis of improvisational skits, participants will extract and apply practical best practices for delivering feedback, ensuring a more refined and impactful approach in their professional roles as software consultants and resellers.
- **Adaptive Communication Techniques:** Attendees will explore and adapt communication techniques showcased in the skits, acquiring a versatile skill set for addressing diverse employee feedback scenarios encountered in their work.
- **Peer-to-Peer Learning:** The session aims to foster a collaborative learning environment, enabling participants to draw from the collective experiences of their peers, thereby expanding their repertoire of effective feedback strategies in the software consultancy and reselling industry.

## CR-2

### Passing The Torch: Empowering The Next Leaders Of Your Business

Room: Grand F/G

*David Delk – Delk Consulting, Greenville, SC*

Do you have young leaders in your organization that you would like to transition your business to one day? Are you a young leader looking to step up to the next level of leadership? Your next steps should not be a mystery; there are proven, practical strategies you can implement to make the transition a huge success.

In this interactive session we will help you:

- Confirm what your business is about and where you are heading. (It's hard to transition something when you don't know what it is or where it is going.)
- Assess the strengths and weaknesses of your current team. (It's a lot easier to be excited about handing things off to the next generation when you are confident that they have what it takes.)
- Develop a plan to prepare the team to step up. (There are specific things you need to do and they need to do to help your transition be a success.)

Come prepared to think, work, plan, ask questions, and leave with specific action steps that will help you empower the next generation of leaders in your business.

## CAS

### Applying The Roadmap For New Technology Implementation

Room: Grand E

*Nina Chmura – Withum, Princeton, NJ*

*Victoria Pritchard - RKL Virtual Management Solutions, LLC, Exton, PA*

*Jason Reitsma – Sage, Atlanta, GA*

*Sarah Sieman – Marcum LLP, NY, NY*

Join us and contribute your insights to the collective quest for the perfect solution! We will apply concepts learned in the first session, through a simulated exercise involving the selection of an FP&A solution for your firm. In roundtable discussions, participants will test the rubric for choosing a new solution.

Learning Objectives:

- Attendees will develop the ability to critically evaluate solutions by examining a real-world use case, identifying strengths, weaknesses, and potential pitfalls, and gaining insights into the factors that contribute to successful user adoption.
- Participants will learn how to identify their firm's specific operational needs by analyzing common pain points, discussing wish list features, and understanding the importance of aligning technology objectives with strategic goals.
- Attendees will refine the roadmap developed in session one through a live exercise.

## ITL-T

### Techie Whisperer: Decoding The Soft Skills In A Hard Drive World

Room: Grand D

**Amel Edmond - WithumSmith+Brown, Red Bank, NJ**

**Terran LaMonda - WithumSmith+Brown, Bethesda, MD**

**Kenneth Waldron - RSM US, LLP, Raleigh, NC**

Quantum Cryptography, RPA, AI, Oh MY!!!! In this Session, we'll review the soft skills it takes to be successful in an ever-evolving technology landscape. Yes, soft skills matter!!! Not only to your career today, but tomorrow!

What will be learned:

- The importance of emerging technologies in the workplace
- The role of soft skills in facilitating technological growth
- How technology can be used to enhance soft skill development

## ITL – S

### Business Without Borders: Architecting Global Organizations In The Digital Era

Room: Grand A

#### Facilitators:

**Nick Cadden - Carr, Riggs & Ingram, LLC, Enterprise, AL**

**Tom Jackson - RSM US, LLP – Davenport, IA**

**John Parker - Carr, Riggs & Ingram, LLC, Enterprise, AL**

**Allen Smith – Baker Tilly, Madison, WI**

In the digital age, the concept of a global organization is no longer a distant dream but a rapidly unfolding reality. "Business Without Borders" is a forward-thinking session designed for Chief Information Officers and IT leaders who are at the forefront of this transformation. This session explores the nuances of building and managing global organizations, leveraging the power of digital technologies. We will delve into strategies for cross-border collaboration, digital infrastructure scalability, and navigating the complexities of diverse regulatory environments. Attendees will gain insights from industry experts who have successfully led global expansion initiatives, learning from their challenges and triumphs.

Learning Objectives:

- Understand the Digital Global Landscape: Grasp the current trends and future outlook of global business in the digital era, including emerging markets and digital adoption rates across different regions.
- Strategic Planning for Global Expansion: Learn how to craft an IT strategy that supports and accelerates global business objectives, while considering cultural, legal, and logistical challenges.
- Leverage Technology for Global Connectivity: Discover how to utilize cloud computing, AI, and other digital technologies to enhance global operations, improve communication, and ensure data security across borders.
- Manage Cross-Cultural Teams: Gain insights into effectively leading and collaborating with culturally diverse teams, enhancing global team dynamics and productivity.
- Navigate Global Compliance and Data Privacy: Understand the complexities of international data privacy laws and compliance requirements, and how to implement IT policies that adhere to these regulations.
- Case Studies and Best Practices: Analyze real-world examples of successful global IT projects, learning from their strategies, tools, and approaches to problem-solving.
- Networking and Collaboration Opportunities: Engage with peers and experts, fostering relationships that can provide ongoing support and collaboration beyond the conference.

This session is not just about understanding the landscape but mastering the art of thriving in it. Join us to unlock the full potential of your organization on the global stage.

## CR-1

### Turning Technicians Into Consultants

Room: Grand B/C

#### Facilitators:

**Moira Goggin** - *DSD Business Systems, Long Beach, CA*

**Ayala Clinkman** - *Business Technology Partners, LLP, Deerfield, IL*

**Gary J. Feldman** - *I-Business Network, Marietta, GA*

#### Panelists:

**CJ Boguszewski** - *Acumatica, Reston, VA*

**Peter Linhares** – *Bridgewater, MA*

**Jim Rosenberg** - *NEO3, LLC, New Middletown, OH*

How do we identify, evaluate, and educate a consultant? Through panel-led discussion, we'll explore the challenges and successes faced as we advance technicians and new hires into consulting roles. Learn what does and does not work and share your experiences. Survey results to ITA CR and CAS members will be shared and discussed.

## CR-2

### What Are You Actually Incentivizing? Re-thinking Incentive Structures From The Employee Mindset

Room: Grand F/G

#### Facilitators:

**Jared Burke** - *goVirtualOffice, LLC, Dodgeville, WI*

**Patrick Johnson** - *Oasis Solutions Group, Louisville, KY*

Is your company level incentive structure effective? What are we actually incentivizing? And do our objectives really require a complicated algorithm to calculate a bonus plan?

In this session, we'll discover how best to create incentives which support the greater trajectory of the organization, while also creating value for all individuals. Maybe your firm targets:

- Top line revenue
- Gross profit
- Net income
- New client acquisition
- Client satisfaction
- Project level profitability
- Employee retention

Do your company values play into the calculus? Does your calculus serve the company core purpose?

Is it possible to incentivize such broad objectives in a single and simple incentive plan?

Join us to consult with ITA & Associates (an imaginary company with attributes not unlike our own), its DNA and objectives, and help define a simple and effective incentive plan, or get well on the way to it.

If we get this right, you'll emerge with

- Ideas to inform discussions and critique of your existing incentive structure
- Wisdom around setting objectives which can actually be incentivized.
- Interaction and collaboration with others who've travelled this road and struggled. And others who got it right.

## CAS

### Forging New Paths: Effective Firm Advocacy In CAS

Room: Grand E

**Gretchan G. Naso - RKL Virtual Management Solutions, LLC, , Lancaster, PA**

**Rebecca Munson – EisnerAmper, Minneapolis, MN**

In this session, we'll delve into key strategies for effectively messaging client accounting services offerings as an emerging practice. Learn how to articulate the value of your services in a way that resonates with your firm's leadership. Discover the importance of establishing clear metrics and performance measurements to track the success of your practice outside of traditional firm metrics. We'll provide practical insights on selecting the right KPIs and leveraging data to demonstrate the impact of your teams' efforts. Additionally, we'll tackle the challenge of crafting a compelling message that communicates your practice identity and dispels common myths about CAS. Learn how to address misconceptions head-on and position your team as leaders in your firm.

## ITL-T

### Do You Want Security With That Identity?

Room: Grand D

**Eric Sachs – Microsoft Corporate Vice President of Product Management, Microsoft Identity & Network Access Division, Woodside, CA**

Passwords and MFA are annoying to users. Identity systems can help minimize them by enabling a user to login once and access numerous applications, though the techniques are evolving quickly with federated login, Passkeys, and other forms of MFA. However, increasingly hackers are focused on attacking identity systems to get access to those applications. Traditional Identity vendors are struggling with the pivot to meet this much higher security bar. Some of the biggest risks are how Identity is handled for business partners where it is harder to impose stringent security requirements.

In this session, we will learn and discuss:

- Why Identity matters so much in today's zero-trust world.
- The different identity challenges faced by large, medium, and small businesses.
- The past, present, and future roadmap for identity solutions.
- Understanding practical applications of Microsoft Identity and various Identity solutions.

## ITL-S

### Embracing The AI Evolution And Empowering Our People

Room: Grand A

#### Facilitator:

**Tom Jackson - RSM US, LLP – Davenport, IA**

**John Roman, Jr. - The Bonadio Group, Pittsford, NY**

#### Panelists:

**Russ Ahlers - BDO USA, LLP, Grand Rapids, MI**

**Craig Ramsey - RSM US, LLP, Davenport, IA**

**Zackery Reichenbach-Carr - RSM US, LLP, Minneapolis, MN**

**Allen Smith – Baker Tilly, Madison, WI**

Join our panel of peers in discussing the ways in which their firms are approaching the adoption and proliferation of AI solutions to drive productivity, improve results, and change the way we look at knowledge work. In this session we will discuss:

- The Hype and the potential
- The Generative AI Explosion
- Responsible Use at our firms
- Thoughts on GenAI and real change

**Tuesday, April 23 – 1:30 – 3:00 pm - (90 CPE Minutes)**

## CR-ALL

### **ERP Evolution: Navigating Change And Welcoming The Next Generation**

Room: Grand B/C

**Facilitator:**

*Misty Palek - Palek Consulting, Slater, IA*

**Panelists:**

*Ayala Clinkman - Business Technology Partners, LLP, Deerfield, IL*

*John Roman, Jr. - The Bonadio Group, Pittsford, NY*

Join us on a journey through the evolving landscape of ERP in a session that explores the ongoing transformation, known as the Great Migration. Delve into the strategies and considerations behind organizations transitioning their ERP systems, embracing modern technologies, and adapting to cloud-based solutions. This session will uncover the key aspects of this significant shift, highlighting both the challenges and opportunities it presents. Additionally, discover how a new wave of tech-savvy leaders from the next generation is taking the reins in steering ERP into the future. Gain valuable insights into the blend of tradition and innovation in the ERP domain and witness firsthand the seamless integration of the old and the new.

## CAS

### **Fireside Chat, Roundtable CAS Wrap Up**

Room: Grand E

*Irfan Dossani - Whitley Penn, Dallas, TX*

*Kane Polakoff – CohnReznick, Farmington Hills, MI*

*Jennifer Witts – CLA, Oak Brook, IL*

CAS leaders come together to summarize key takeaways regarding CAS leadership development, technology, and advocacy. Leaders are invited to share their insights related to these topics as well as the future of the CAS profession. The session will end with how ITA can continue to be an avenue for CAS collaboration and growth.

## ITL-ALL

### **ITL Strategic & Tactical Roundtable Discussion - Unleashing Tech Talent: The Art of Becoming Indispensable**

Room: Grand D

**Facilitators:**

*Robert Neill – Weaver, Austin, TX*

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

Join us for an engaging roundtable discussion as we dive into what makes an exceptional technology professional and the 10 habits that set them apart. In this interactive session, participants will have the unique opportunity to share their experiences and insights on collaborating with individuals who embody the qualities of being In Tune, Sharp, Translatable, Controlling, Daring, Known, Gone, Swervable, Mindful, and Respectful.

**Tuesday, April 23 – 3:00 to 3:15 pm**

### **Wrap Up Session & Adjournment of The ITA Spring Collaborative**

Room: Grand D

**Facilitator:**

*Geni Whitehouse – ITA President, Napa, CA*

Join ITA President, Geni Whitehouse, for a wrap up of the Spring Collaborative.



## Session Descriptions and Speakers

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

**Sunday, April 21 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)**

**4:30 – 4:45 pm**

### **President's Welcome**

**Room: Grand D/E**

***Geni Whitehouse – ITA President, Napa, CA***

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

**4:45 – 6:00 pm (75 CPE)**

### **KEYNOTE: Life Beyond Fear**

**Room: Grand D/E**

***Mark Mathews – Award Winning Keynote Speaker, Queensland, Australia***

Through his career as a professional 'Big Wave' surfer and Red Bull Athlete, Mark Mathews has become obsessed with the relationship between personal growth, high performance and fulfilment. This Life Beyond Fear keynote Mark takes the audience through deconstructed, fine-tuned, and personalized emotion and resilience techniques that help successfully strengthen one's mindset and sustain long term performance.

**Monday, April 22 – 8:00 to 9:30 am - Monday Morning General Session & Keynote (60 CPE Minutes)**

**8:00 – 8:20 am**

### **ITA's Leadership Alliance (ILA) Graduation – Class of 2023**

**Room: Grand D/E**

***Geni Whitehouse – ITA President, Napa, CA***

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

ITA President Geni Whitehouse will present the 2023-2024 Class of the ITA's Leadership Alliance (ILA) with their graduation certificates.



8:30 – 9:30 am (60 CPE Minutes)

## KEYNOTE: The Landscape Of AI Innovation

Room: Grand D/E

**Noelle Russell – Multi Year-Award Winner in AI for Companies: Microsoft, IBM, NPR and More**

An overview of current trends and the importance of Inclusive innovation. In this session, renowned AI leader Noelle Russell takes a look at how specific industries are evolving due to the implementation of generative and applied AI technologies. As Russell gets groups thinking about AI and how it can be leveraged in support of their business goals, she shares real-life case study applications that demonstrate more than a dozen applied AI models that can be leveraged to optimize business, create game-changing solutions, and power growth. As Russell examines the opportunities that AI presents for organizations, she also considers the risks, challenges, and ethical considerations — focusing in depth on how AI can be implemented to support human ingenuity, rather than replace it. If your organization is looking to successfully expedite innovation and improve the accessibility of its applications, this program is the perfect starting point.

## Deep Dive Workshops

Monday, April 22 - 10:00 am to 3:15 pm (with lunch from Noon to 1:15) – (240 CPE Minutes)

### Workshop 1

#### The Landscape Of AI Innovation

Room: Grand D

**Noelle Russell – Multi Year-Award Winner in AI for Companies: Microsoft, IBM, NPR and More**

In this session, renowned AI leader Noelle Russell takes a look at how specific industries are evolving due to the implementation of generative and applied AI technologies. As Russell gets groups thinking about AI and how it can be leveraged in support of their business goals, she shares real-life case study applications that demonstrate more than a dozen applied AI models that can be leveraged to optimize business, create game-changing solutions, and power growth. As Russell examines the opportunities that AI presents for organizations, she also considers the risks, challenges, and ethical considerations — focusing in depth on how AI can be implemented to support human ingenuity, rather than replace it. If your organization is looking to successfully expedite innovation and improve the accessibility of its applications, this program is the perfect starting point.

Topics to include:

- Ethical Foundations in AI
- Scaling Inclusive AI
- Design Thinking for AI
- Envisioning the Future

### Workshop 2

#### The Next Wave

Room: Grand E

**Mark Mathews – Award Winning Keynote Speaker, Queensland, Australia**

The Next Wave is a video-based choose-your-own-adventure teaming session that follows the exciting career of professional big-wave Surfer, Mark Mathews and his team.

In the ocean, you must stay hypersensitive to change, continually reassessing conditions and refocusing goals and strategies. This creates a great environment to explore team dynamics, leadership, communication, and the values that underpin your company's success.

The audience is grouped into professional surf teams, including the roles of photographer, swell forecaster, water safety crew, manager, publicist, and surfer. You'll be transported out into the ocean (virtually) where you will face a series of exciting scenarios, have to make difficult decisions, and either reap the rewards or face the consequences of those decisions.

After a brief immersion into the business of Big Wave Surfing, you and your team will take the reins of Mark's career. You'll be faced with a series of real-life scenarios from Mark's career. Each scenario will leave you with two options. As a team, you will make your decision, watch the outcomes, and then get your results.

### Workshop 3

#### Negotiation & Conflict Types: Engagement Tactics Plus Negotiation Excellence: How To Make Better Decisions Through Negotiation Skills

Room: Grand B/C

**Joanna Shea: CEO and Co-Founder of the Negotiations Collective**

The first part of the Workshop will be on Negotiation & Conflict Types and Engagement Tactics. Skilled negotiators know their natural negotiation and conflict style, can identify their counterparts, and can adjust their own to mirror, soften, or push their counterparts for the best results. In this two-hour session, the NC will train attendees in:

- Identification of one's natural negotiation and conflict type
- How to identify a counterpart's natural negotiation and conflict type
- The pros and cons to each type
- When to deploy each type
- The results each type will likely achieve
- Techniques required to get the best out of each type
- Engagement tactics used by skilled negotiators, and how to react in kind

The second part will be on Negotiation Excellence: How to make better decisions through negotiation skills. No two negotiations are the same. Political (internal or external), economic, cultural, environmental, personal and or a variety of other factors will present themselves in diverse ways in different negotiations. You cannot control these variables, no matter how talented a negotiator you are. This second two-hour session will deliver training on how to prepare, push your value proposition, how you present yourself as a negotiator, and how you offer acceptable solutions that create more value.

Key learning points will include:

- Strategic Networking
- Value Creation
- Process
- Planning
- Teams
- Strategy

Prepare for MORE. More trust. More opportunity. More confidence. More value.

### Workshop 4

#### Remaining Relevant In Transformative Times: How To Manage Change, Lead The Future And Upgrade Yourself And Your Firm

Room: Grand F/G

**Rishad Tobaccowala – Rishad Tobaccowala LLC – Chicago, IL**

**Author, Speaker, Teacher and Advisor For Four Decades**

In this session, Rishad will lead an interactive workshop playing built around understanding the four big shifts impacting every business, discuss how to apply the six keys to unlocking change. We will then discuss how best to lead on a world of debossification and how we all can continue to upgrade our mental operating systems. Rishad's best-selling book "Restoring the Soul of Business: Staying Human in the Age of Data" was published globally by HarperCollins and focusses on helping people think, feel, and see differently about how to grow their companies, their teams and themselves in transformative times. Tobaccowala was named by BusinessWeek as one of the top business leaders for his pioneering innovation and TIME magazine dubbed him one of five "Marketing Innovators". He is the Ad Age Interactive Hall of Fame and has received a lifetime achievement silver medal award from the Chicago Ad Federation, an Inspire Award for motivating and building talent from the Advertising Education Foundation and the Association of National Advertisers and was named an Advertising Legend by the Advertising Club of New York. Rishad is also chairman of The Tobaccowala Foundation, which helps over 10,000 people gain better access to health and education in India. Tobaccowala holds a bachelor's degree in mathematics from the University of Bombay and an MBA from the Booth School of Business at the University of Chicago with which he remains closely involved.

## Concurrent Sessions – By Date and Time

**Monday, April 22 – 3:30 to 5:00 pm - (90 CPE Minutes)**

## **CR-1**

### **Reporting, Analytics, KPIs And Other Aspects Of Measuring Results In Our Own Businesses**

**Room: Grand B/C**

***Robert Gaby - RKL eSolutions LLC, Colorado Springs, Co***

Knowledge increases in value when shared! Join your fellow ITA business leaders for a lively facilitated discussion geared to uncover the best reports, analytics and key performance indicators (KPI's) to measure past and future performance. The session will include several round table discussions centered on reports and analytics used to:

- Evaluate marketing effectiveness
- Forecast product and service revenue
- Evaluate operational efficiency and productivity
- Gage customer satisfaction and retention
- Gage employee satisfaction and retention
- Identify potential risks or threats to the business

In addition to identifying the best of the best analytics and KPI's, the discussions will include tools firms are using to collect, develop and present this data in a meaningful way. Round tables will focus on doing a deep dive on two or three reporting areas and will report their findings back to the group. Participants a certain to take away new metrics they can incorporate into their current reporting; refinements to their existing analytics and reports; and/or new tools to create and develop reports for their business.

## **CR-2**

### **Presales American Idol Style**

**Room: Grand F/G**

#### **Facilitators:**

***Moira Goggin - DSD Business Systems, Long Beach, CA***

***Julian Schrenzel - DyNexus Recruiting & Staffing, Seattle, WA***

#### **Panelists:**

***Mike Duberstein - Presales Leader LLC, Lancaster, PA***

***Rebecca Munson – EisnerAmper, Minneapolis, MN***

***Jim Norton - Intellitec Solutions, LLC, Newark, DE***

***Misty Palek - Palek Consulting, Slater, IA***

CR and CAS audience volunteers vie for prizes by presenting a presales pitch to a panel of judges (the prospect) needing a new solution or service. In this interactive session, we'll see who's off-key and who hits the high notes. Participants vote 'Idol Style' while Judges reveal what pitch rang their bells and scored an encore. Amazing tech prizes for the top performers! Everyone has a role in this lively session of insightful presales counterpoint. Keep your ear out to learn what strikes the right note for a perfectly fine-tuned pitch, or even better, get up and do it YOURSELF!

Learning Objectives:

- Presentation styles
- Presentation skills that resonate with prospects/customers
- Identifying solutions quickly
- Understanding Customer Wants vs. Needs

## CAS

### Pathways To Purpose – Go From Passion To Profession

Room: Grand E

*Jessica E. Barnas - Wipfli LLP, Aurora, IL*

*Kimberly K. Blascoe – CPA.com / AICPA, NY, NY*

*Arna Erazo – GHJ, Los Angeles, CA*

*Kane Polakoff – CohnReznick, Farmington Hills, MI*

*Rachel Wehrman - Elliott Davis LLC, Charleston, SC*

Clearly established roles create accountability, allowing for a transparent and traceable process. A structured approach to roles enables the identification of client needs and ensures that advisory services can be tailored to meet the unique requirements of your client, enhancing the value provided. In this 90-minute working session, we delve into the details of a CAS roles and responsibilities matrix that can be utilized in practice to align team skills, responsibilities, and growth trajectory for career paths.

This session will empower you to optimize your approach to staffing, and plan for next steps as your practice grows and evolves in the advisory space.

Learning Objectives:

- Explore and interpret the defined roles and responsibilities of CAS in a practice matrix
- Recognize how the CAS roles and responsibilities matrix applies to their own practice
- Use the roles and responsibilities matrix to indicate how staff will matriculate through the levels by upskilling, demonstrating proficiency at each level

## ITL-T

### ITL Tactical Roundtables: The IT Personnel Factor

Room: Grand D

*Daniel Johnson – Carr, Riggs & Ingram, LLC, Harlingen, TX*

Boots on the ground discussion ranging from staffing levels and burn out to departmental management and skills expectations.

## ITL-S

### ITL Strategic Roundtables: Will Artificial Intelligence Make Us Dumber?

Room: Grand A

*Ellen Choi – Aiwyn, Charlotte, NC*

*Nick Fry - CBIZ MHM, LLC, Kansas City, MO*

*John Roman, Jr. - The Bonadio Group, Pittsford, NY*

*Kevin Sexton - Cohen & Company, Cleveland, OH*

One of the promises of AI is it can augment human capabilities by automating repetitive tasks and sifting through vast amounts of data. Through automation and data analytics AI may allow us to focus on more complex and creative endeavors. However, relying too heavily on AI for basic tasks might reduce our cognitive engagement and critical thinking. Join us in an open, thought provoking discussion aimed at sharing your thoughts, ideas, experiences, and insights into avoiding an “AI Induced Brain Drain”.

**Monday, April 22 – 5:00 to 6:00 pm - (60 CPE Minutes) – With Beverage Service**

## **CAS & CIO/ITL Collaboration**

### **"IT And CAS Walk Into A Bar... "**

#### **A Discussion On How IT And CAS Can Better Collaborate And Crack The Code On Client Success**

**Room: Grand E**

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

*Greg Landers - CBIZ MHM, LLC,, San Diego, CA*

In 2023 the CAS and ITL tracks met together as a group for the first time. This meeting was successful in exposing some of the pain points between IT and CAS. Over the past year many firms have seen growth within their CAS practices and have been working more closely than ever before with their counterparts in IT. This session will focus on how firms have continued to improve communication between both teams as well as optimizing processes and workflows that have eased the struggles identified in 2023. This session's panelists will share stories about how their firms have continued to overcome obstacles between the two teams. Attendees will also have the opportunity to share success from their own firms via live group discussion.

Attendee's of this session will learn:

- How CAS groups have been able to accelerate their firms IT acceptance of new technologies
- What practices firms have put into place to improve the balance of speed of technology adoption with IT security and use of corporate resources
- What, if any, role legal should play the CAS/IT acceptance of new technologies

**Tuesday, April 23 – 8:00 to 9:15 am - (75 CPE Minutes)**

## **CR-1**

### **Protecting Value In Fixed Fee Engagements**

**Room: Grand B/C**

#### **Facilitator:**

*Gary J. Feldman - I-Business Network, Marietta, GA*

#### **Panelists:**

*Shawn P. Slavin - SWK Technologies, Inc., Owasso, OK*

*Richard Stellar – Stellar One Consulting, Flower Mound, TX*

*Brian Terrell - BTerrell Group, LLP, Plano, TX*

Customers and service providers have been interested in and dabbling with fixed fee and value-based contracting; however, execution, implementation and adoption remains limited in the marketplace. Resistance comes from a variety of factors which can be overcome to create delighted customers and increase margins.

In this session we will:

- Review processes for determining fees.
- How traditional and new metrics can be used to evaluate performance.
- Discuss contractual terms and tools to protect you and the customer in the new billing paradigm.
- Identify barriers to adoption and methods for overcoming fear of change. **CAS**

## CR-2

### Navigating Accountability In Software Implementation: Strategies For Successful Project Delivery

Room: Grand F/G

*Clifford Horst - RKL eSolutions LLC, Lancaster, PA*

*Jim Norton - Intellitec Solutions, LLC, Newark, DE*

Join us for an enlightening conference session tailored specifically for software resellers and consultants eager to enhance their project management skills. In this dynamic presentation, we will delve into the crucial aspect of accountability during software implementation. Successfully delivering a project hinges on the ability to manage difficult conversations, establish clear responsibilities, and understand the cause-and-effect relationship between various project elements.

This conference session is a must-attend for software resellers and consultants who are committed to elevating their project management skills and ensuring the success of their software implementations. Be prepared to leave with actionable strategies and a renewed confidence in your ability to establish and stand by accountability throughout the implementation lifecycle.

#### Learning Objectives:

- **Define Effective Communication Strategies:** Participants will learn to identify and employ effective communication strategies when faced with difficult conversations during software implementation, fostering a positive and collaborative team environment.
- **Establish Clear Roles and Responsibilities:** Attendees will acquire practical techniques for defining and communicating clear roles and responsibilities within a project team, minimizing ambiguity and maximizing individual and collective accountability.
- **Understand the Cause-and-Effect Relationship:** Participants will gain a comprehensive understanding of the cause-and-effect relationship between missing deliverables and project timelines. This knowledge will empower them to proactively manage risks, make informed decisions, and keep projects on track.
- **Integrate Expert Insights and Best Practices:** Participants will benefit from the expertise of industry professionals, incorporating their insights and best practices into their project management approach. This will equip them with the tools needed to successfully navigate the complexities of software implementations and ensure project success.

## CAS

### Creating A Roadmap For New Technology Implementations

Room: Grand E

*Adi Rubin – Marcum LLP, Washington, DC*

*Nina Chmura – Withum, Princeton, NJ*

*Victoria Pritchard - RKL Virtual Management Solutions, LLC, Exton, PA*

*Brian Champ – Sage, San Jose, CA*

*Sarah Sieman – Marcum LLP, NY, NY*

This session shines a focus on crafting a pragmatic implementation roadmap so that participants can create a structured evaluation process for selecting the right technological tools to meet specific operational needs.

The session will delve into:

- Establishing clear technology objectives aligned with your firm's strategic goals.
- Conducting a needs assessment to identify technological gaps and opportunities.
- Developing criteria for vetting technology based on functionality, integration, scalability, and ROI.
- Creating a decision matrix to objectively evaluate and select technology solutions.
- Outlining a phased implementation plan that includes pilot testing, full-scale rollout, and post-implementation review.

Attendees will leave the session equipped with a customizable framework to assess the suitability of new technologies for their practice, ensuring informed decision-making that can propel their CAS offerings to new heights of efficiency and client service.

## ITL – T

### Famous Last Words: “We Should Really Get This Documented” - How Are We Documenting and Sharing Knowledge Throughout Our Organizations?

Room: Grand D

#### Facilitator:

*Patrick Justice - Elliott Davis, LLC, Greenville, SC*

#### Panelists:

*Sean Grieco – The Bonadio Group, Amhurst, NY*

*Kendrick Hagins – Whitley Penn, Forth Worth, TX*

*Rebecca Miksch – Wipfli, Milwaukee, WI*

Knowledge management is a critical component of running a successful and cohesive organization. From creating a helpdesk knowledgebase article, to large application, database, or infrastructure configurations, how are you making sure this information is shared at the enterprise level, specifically with individuals who “need to know?” In addition to identifying varying best practices, in this session we will discuss what types of information needs to be shared, how this information is disseminated, and how often this information should be updated and reviewed.

We hope you will join us in this interactive session to discuss and learn more about:

- How does your organization share knowledge at the service desk level all the way up to enterprise level? What type of knowledge needs to be shared?
- Does your organization have a knowledge base? If so, what is it? Is your organization using any 3rd party applications or relying on OneNote, SharePoint, or your ITSM? What do you recommend?
- What is your process for creating knowledgebase articles? Are they necessary? Is there a better way to share critical information?

## ITL-S

### You Got Apps To The Left, Apps To The Right – And You’re The Only Techie In Town

Room: Grand A

#### Facilitator /Panelist

*Robert Neill – Weaver, Austin, TX*

#### Panelists:

*Russ Ahlers - BDO USA, LLP, Grand Rapids, MI*

*Morgan Page – Weaver, Houston, TX*

*John Roman, Jr. - The Bonadio Group, Pittsford, NY*

The number of applications that already exists within our firms and the number of emerging applications that are entering the accounting industry market continues to grow. Realizing maximum value from existing investments in technology and guiding our firms on where to invest next in technology to enable efficient growth and expand into new services is a challenge. In this session, attendees will learn:

- Approaches for how we as IT leaders, engage with practice groups to educate on existing tech;
- How to learn about emerging tech in our industry
- How to expose practice leaders to new technology (beyond the software sales pitch)
- Ideas for unlocking the art of the possible for innovating delivery processes.

**Tuesday, April 23 – 9:30 to 10:45 am - (75 CPE Minutes)**

**CR-1**

## **Feedback Finesse: A Theatrical Dive Into Vibrant Employee Dynamics**

**Room: Grand B/C**

### **Facilitators:**

**Moira Goggin - DSD Business Systems, Long Beach, CA**

**Jim Norton - Intellitec Solutions, LLC, Newark, DE**

### **Panelists:**

**Julian Schrenzel - DyNexus Recruiting & Staffing, Seattle, WA**

**Walter Goodfield - RKL eSolutions LLC, Lancaster, PA**

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

Join us for an engaging and interactive conference session tailored exclusively for software consultants and resellers. In "Performance Play," we take a unique approach to exploring the intricacies of employee feedback through the lens of improvisational skits. Imagine a live, dynamic session where a select group of individuals apply the art of improvisation to act out a series of common feedback scenarios, ranging from positive affirmations to constructive criticisms.

This session goes beyond traditional lecture-style presentations and invites you to participate in a "Who's Line is it Anyway"-inspired experience. Our skilled actors will embody employees, managers, and team members, bringing these scenarios to life in a way that feels both authentic and relatable. Witness firsthand the impact of effective and ineffective feedback delivery, and gain valuable insights into the nuances of communication within a professional setting.

But the real magic happens when we turn the spotlight on you—the audience. Following each skit, we open the floor for a lively discussion where you can share your critiques, best practices, and innovative ideas for handling similar situations. This collaborative exchange creates a vibrant learning environment where real-world experiences and diverse perspectives come together to shape a collective understanding of successful feedback strategies.

Don't miss this opportunity to blend learning with entertainment, fostering a community of knowledge-sharing and skill development. "Performance Play" promises an unforgettable session that will leave you equipped with the tools to enhance your role as a software consultant or reseller in the realm of employee feedback.

### **Learning Objectives:**

- **Discerning Feedback Nuances:** Participants will develop the ability to recognize subtle nuances in employee feedback scenarios, distinguishing between positive affirmations and constructive criticisms through live skit experiences.
- **Interactive Skill-building:** Attendees will actively engage in constructive discussions, sharing and receiving insights from peers to enhance their understanding of effective communication strategies in the context of employee feedback.
- **Applied Best Practices:** Through the analysis of improvisational skits, participants will extract and apply practical best practices for delivering feedback, ensuring a more refined and impactful approach in their professional roles as software consultants and resellers.
- **Adaptive Communication Techniques:** Attendees will explore and adapt communication techniques showcased in the skits, acquiring a versatile skill set for addressing diverse employee feedback scenarios encountered in their work.
- **Peer-to-Peer Learning:** The session aims to foster a collaborative learning environment, enabling participants to draw from the collective experiences of their peers, thereby expanding their repertoire of effective feedback strategies in the software consultancy and reselling industry.



## CR-2

### Passing The Torch: Empowering The Next Leaders Of Your Business

Room: Grand F/G

*David Delk – Delk Consulting, Greenville, SC*

Do you have young leaders in your organization that you would like to transition your business to one day? Are you a young leader looking to step up to the next level of leadership? Your next steps should not be a mystery; there are proven, practical strategies you can implement to make the transition a huge success.

In this interactive session we will help you:

- Confirm what your business is about and where you are heading. (It's hard to transition something when you don't know what it is or where it is going.)
- Assess the strengths and weaknesses of your current team. (It's a lot easier to be excited about handing things off to the next generation when you are confident that they have what it takes.)
- Develop a plan to prepare the team to step up. (There are specific things you need to do and they need to do to help your transition be a success.)

Come prepared to think, work, plan, ask questions, and leave with specific action steps that will help you empower the next generation of leaders in your business.

## CAS

### Applying The Roadmap For New Technology Implementation

Room: Grand E

*Adi Rubin – Marcum LLP, Washington, DC*

*Nina Chmura – Withum, Princeton, NJ*

*Victoria Pritchard - RKL Virtual Management Solutions, LLC, Exton, PA*

*Brian Champ – Sage, San Jose, CA*

*Sarah Sieman – Marcum LLP, NY, NY*

In the fast-paced world of modern accounting, outsourcing has become a cornerstone for efficiency and scalability. Leveraging software solutions tailored for outsourced accounting practices can significantly enhance productivity, accuracy, and client satisfaction. Our expert panel will candidly discuss their experiences with solutions they are using or evaluated, highlighting success stories, challenges faced, and lessons learned all while crafting a wish list for the perfect solution along the way all based on feedback from our first session.

Join us and contribute your insights to the collective quest for the perfect solution!

Learning Objectives:

- Attendees will develop the ability to critically evaluate accounting software solutions by examining real-world use cases, identifying strengths, weaknesses, and potential pitfalls, and gaining insights into the factors that contribute to successful implementation and usage.
- Participants will learn how to identify their firm's specific operational needs and requirements for accounting software solutions by analyzing common pain points, discussing wish list features, and understanding the importance of aligning technology objectives with strategic goals.
- Attendees will explore emerging trends and best practices in accounting software solutions, enabling them to anticipate future technological advancements, adapt their practices accordingly, and develop strategies for selecting solutions that can evolve with their firm's changing needs and the broader industry landscape.

## ITL-T

### Techie Whisperer: Decoding The Soft Skills In A Hard Drive World

Room: Grand D

**Amel Edmond - WithumSmith+Brown, Red Bank, NJ**

**Kenneth Waldron - RSM US, LLP, Raleigh, NC**

**Terran LaMonda - WithumSmith+Brown, Bethesda, MD**

Quantum Cryptography, RPA, AI, Oh MY!!!! In this Session, we'll review the soft skills it takes to be successful in an ever-evolving technology landscape. Yes, soft skills matter!!! Not only to your career today, but tomorrow!

What will be learned:

- The importance of emerging technologies in the workplace
- The role of soft skills in facilitating technological growth
- How technology can be used to enhance soft skill development

## ITL – S

### Business Without Borders: Architecting Global Organizations In The Digital Era

Room: Grand A

#### Facilitators:

**Nick Cadden - Carr, Riggs & Ingram, LLC, Enterprise, AL**

**Tom Jackson - RSM US, LLP – Davenport, IA**

**John Parker - Carr, Riggs & Ingram, LLC, Enterprise, AL**

**Allen Smith – Baker Tilly, Madison, WI**

In the digital age, the concept of a global organization is no longer a distant dream but a rapidly unfolding reality. "Business Without Borders" is a forward-thinking session designed for Chief Information Officers and IT leaders who are at the forefront of this transformation. This session explores the nuances of building and managing global organizations, leveraging the power of digital technologies. We will delve into strategies for cross-border collaboration, digital infrastructure scalability, and navigating the complexities of diverse regulatory environments. Attendees will gain insights from industry experts who have successfully led global expansion initiatives, learning from their challenges and triumphs.

Learning Objectives:

- Understand the Digital Global Landscape: Grasp the current trends and future outlook of global business in the digital era, including emerging markets and digital adoption rates across different regions.
- Strategic Planning for Global Expansion: Learn how to craft an IT strategy that supports and accelerates global business objectives, while considering cultural, legal, and logistical challenges.
- Leverage Technology for Global Connectivity: Discover how to utilize cloud computing, AI, and other digital technologies to enhance global operations, improve communication, and ensure data security across borders.
- Manage Cross-Cultural Teams: Gain insights into effectively leading and collaborating with culturally diverse teams, enhancing global team dynamics and productivity.
- Navigate Global Compliance and Data Privacy: Understand the complexities of international data privacy laws and compliance requirements, and how to implement IT policies that adhere to these regulations.
- Case Studies and Best Practices: Analyze real-world examples of successful global IT projects, learning from their strategies, tools, and approaches to problem-solving.
- Networking and Collaboration Opportunities: Engage with peers and experts, fostering relationships that can provide ongoing support and collaboration beyond the conference.
- This session is not just about understanding the landscape but mastering the art of thriving in it. Join us to unlock the full potential of your organization on the global stage.

## CR-1

### Turning Technicians Into Consultants

Room: Grand B/C

#### Facilitators:

**Moira Goggin** - *DSD Business Systems, Long Beach, CA*

**Ayala Clinkman** - *Business TechnologY Partners, LLP, Deerfield, IL*

**Gary J. Feldman** - *I-Business Network, Marietta, GA*

#### Panelists:

**CJ Boguszewski** - *Acumatica, Reston, VA*

**Peter Linhares** – *Bridgewater, MA*

**Dan Moses** - *PwC Private, Pittsburgh, PA*

**Jim Rosenberg** - *NEO3, LLC, New Middletown, OH*

How do we identify, evaluate, and educate a consultant? Through panel-led discussion, we'll explore the challenges and successes faced as we advance technicians and new hires into consulting roles. Learn what does and does not work, and share your experiences. Survey results to ITA CR and CAS members will be shared and discussed.

## CR-2

### What Are You Actually Incentivizing? Re-thinking Incentive Structures From The Employee Mindset

Room: Grand F/G

#### Facilitators:

**Jared Burke** - *goVirtualOffice, LLC, Dodgeville, WI*

**Patrick Johnson** - *Oasis Solutions Group, Louisville, KY*

Is your company level incentive structure effective? What are we actually incentivizing? And do our objectives really require a complicated algorithm to calculate a bonus plan?

In this session, we'll discover how best to create incentives which support the greater trajectory of the organization, while also creating value for all individuals. Maybe your firm targets:

- Top line revenue
- Gross profit
- Net income
- New client acquisition
- Client satisfaction
- Project level profitability
- Employee retention

Do your company values play into the calculus? Does your calculus serve the company core purpose?

Is it possible to incentivize such broad objectives in a single and simple incentive plan?

Join us to consult with ITA & Associates (an imaginary company with attributes not unlike our own), its DNA and objectives, and help define a simple and effective incentive plan, or get well on the way to it.

If we get this right, you'll emerge with

- Ideas to inform discussions and critique of your existing incentive structure
- Wisdom around setting objectives which can actually be incentivized.
- Interaction and collaboration with others who've travelled this road and struggled. And others who got it right.

## CAS

### Forging New Paths: Effective Firm Advocacy In CAS

Room: Grand E

**Gretchan G. Naso - RKL Virtual Management Solutions, LLC, , Lancaster, PA**

**Rebecca Munson – EisnerAmper, Minneapolis, MN**

In this session, we'll delve into key strategies for effectively messaging client accounting services offerings as an emerging practice. Learn how to articulate the value of your services in a way that resonates with your firm's leadership. Discover the importance of establishing clear metrics and performance measurements to track the success of your practice outside of traditional firm metrics. We'll provide practical insights on selecting the right KPIs and leveraging data to demonstrate the impact of your teams' efforts. Additionally, we'll tackle the challenge of crafting a compelling message that communicates your practice identity and dispels common myths about CAS. Learn how to address misconceptions head-on and position your team as leaders in your firm.

## ITL-T

### Do You Want Security With That Identity?

Room: Grand D

**Eric Sachs – Microsoft Corporate Vice President of Product Management, Microsoft Identity & Network Access Division, Woodside, CA**

**Craig Ramsey - RSM US, LLP, Davenport, IA**

Passwords and MFA are annoying to users. Identity systems can help minimize them by enabling a user to login once and access numerous applications, though the techniques are evolving quickly with federated login, Passkeys, and other forms of MFA. However, increasingly hackers are focused on attacking identity systems to get access to those applications. Traditional Identity vendors are struggling with the pivot to meet this much higher security bar. Some of the biggest risks are how Identity is handled for business partners where it is harder to impose stringent security requirements.

In this session, we will learn and discuss:

- Why Identity matters so much in today's zero-trust world.
- The different identity challenges faced by large, medium, and small businesses.
- The past, present, and future roadmap for identity solutions.
- Understanding practical applications of Microsoft Identity and various Identity solutions.

## ITL-S

### Embracing The AI Evolution And Empowering Our People

Room: Grand A

#### Facilitator:

**Tom Jackson - RSM US, LLP – Davenport, IA**

**John Roman, Jr. - The Bonadio Group, Pittsford, NY**

#### Panelists:

**Russ Ahlers - BDO USA, LLP, Grand Rapids, MI**

**Craig Ramsey - RSM US, LLP, Davenport, IA**

**Zackery Reichenbach-Carr - RSM US, LLP, Minneapolis, MN**

**Allen Smith – Baker Tilly, Madison, WI**

Join our panel of peers in discussing the ways in which their firms are approaching the adoption and proliferation of AI solutions to drive productivity, improve results, and change the way we look at knowledge work. In this session we will discuss:

- The Hype and the potential
- The Generative AI Explosion
- Responsible Use at our firms
- Thoughts on GenAI and real change

**Tuesday, April 23 – 1:30 – 3:00 pm - (90 CPE Minutes)**

## CR-ALL

### **ERP Evolution: Navigating Change And Welcoming The Next Generation**

Room: Grand B/C

**Facilitator:**

*Misty Palek - Palek Consulting, Slater, IA*

**Panelists:**

*Ayala Clinkman - Business Technology Partners, LLP, Deerfield, IL*

*John Roman, Jr. - The Bonadio Group, Pittsford, NY*

*Bryan L. Wilton - LBMC Technology Solutions, Brentwood, TN*

Join us on a journey through the evolving landscape of ERP in a session that explores the ongoing transformation, known as the Great Migration. Delve into the strategies and considerations behind organizations transitioning their ERP systems, embracing modern technologies, and adapting to cloud-based solutions. This session will uncover the key aspects of this significant shift, highlighting both the challenges and opportunities it presents. Additionally, discover how a new wave of tech-savvy leaders from the next generation is taking the reins in steering ERP into the future. Gain valuable insights into the blend of tradition and innovation in the ERP domain and witness firsthand the seamless integration of the old and the new.

## CAS

### **Fireside Chat, Roundtable CAS Wrap Up**

Room: Grand E

*Irfan Dossani - Whitley Penn, Dallas, TX*

*Kane Polakoff – CohnReznick, Farmington Hills, MI*

*Jennifer Witts – CLA, Oak Brook, IL*

## ITL-ALL

### **ITL Strategic & Tactical Roundtable Discussion - Unleashing Tech Talent: The Art of Becoming Indispensable**

Room: Grand D

**Facilitators:**

*Robert Neill – Weaver, Austin, TX*

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

Join us for an engaging roundtable discussion as we dive into what makes an exceptional technology professional and the 10 habits that set them apart. In this interactive session, participants will have the unique opportunity to share their experiences and insights on collaborating with individuals who embody the qualities of being In Tune, Sharp, Translative, Controlling, Daring, Known, Gone, Swervable, Mindful, and Respectful.

**Tuesday, April 23 – 3:00 to 3:15 pm**

### **Wrap Up Session & Adjournment of The ITA Spring Collaborative**

Room: Grand D

**Facilitator:**

*Geni Whitehouse – ITA President, Napa, CA*

Join ITA President, Geni Whitehouse, for a wrap up of the Spring Collaborative.



## NASBA Registry Information

**Credit Hours:** Up to 16 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

**NASBA Registry of CPE Sponsors**

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**Administration**

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