



July 23-25, 2023
The Madison Concourse Hotel
Madison, Wisconsin

INFORMATION TECHNOLOGY ALLIANCE

Internal Tech Leaders

SUMMER MEETING

Sunday, July 23

12:30 PM	4:00 PM	On Your Own Time - Local Activities
4:00 PM	9:00 PM	Badge Pickup - Registration Desk - Capitol Ballroom Foyer 2nd Floor
5:00 PM	9:00 PM	Opening Reception and Dinner Party - Madison Ballroom 2nd Floor

Monday, July 24

		STRATEGIC TRACK Capitol B	TACTICAL TRACK & COMBINED Wisconsin Ballroom
7:00 AM	8:00 AM	Breakfast - Senate Room 1st Floor	
8:00 AM	8:10 AM	Welcome And Agenda Review - Wisconsin Ballroom <i>Shawn Slavin, ITA President</i>	
8:10 AM	9:30 AM	Host Firm Welcome And Executive Presentation - Wisconsin Ballroom <i>Allen Smith, CIO and Christine Dahlhauser, Managing Partner, Wisconsin - Baker Tilly</i>	
9:30 AM	10:00 AM	Break	
10:00 AM	11:30 AM	Academic Perspective On AI And Its Role In Accounting - Wisconsin Ballroom	
11:30 AM	12:30 PM	Lunch - Senate Room	
12:30 PM	1:45 PM	ChatGPT – Is Your Firm Ready? - Wisconsin Ballroom	
1:45PM	2:00 PM	Break	
2:00 PM	3:15 PM	You Can't Spell AICPA Without AI	Prompt Engineering - Ask Me No Questions And I'll Tell You No Lies
3:15 PM	3:30 PM	Break	
3:30 PM	4:45 PM	Strategic Roundtables Metrics Madness: The Good, The Bad, And The Ugly Of CIO Data Submission	Tactical Roundtables
6:00 PM	8:30 PM	Monday Night Dinner and Social Event The Boat House at the Edgewater Hotel	

Tuesday, July 25

		STRATEGIC TRACK Capitol B	TACTICAL TRACK & COMBINED Wisconsin Ballroom
7:30 AM	8:30 AM	Breakfast - Senate Room	
8:30 AM	10:00 AM	IT Unlocking The Mysteries Of Managing New Technology Adoption - Wisconsin Ballroom	
10:00 AM	10:30 AM	Break	
10:30 AM	12:00 PM	Governance And AI - How To Adapt To AI Generally And Specifically ChatGPT	Questions, Questions, And More Questions – Handling Due Diligence Questionnaires
12:00 PM	1:15PM	Lunch - Senate Room	
1:15 PM	2:45PM	Keeping The Natives From Becoming Restless	Compliance Frameworks
2:45 PM	3:00 PM	Break	
3:00 PM	4:30 PM	Strategic Roundtables: How Risky Is Your Business (Partner) - Managing Third Party Risk	Tactical Roundtables
4:30 PM	4:45 PM	Closing Discussion And Adjourn - Wisconsin Ballroom <i>Shawn Slavin, ITA President</i>	
6:00 PM	8:30 PM	Optional Meet Up For Members Staying Until Wednesday Coopers Tavern	



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Monday, July 24

8:10am – 9:30am

Track - All CPE – 80 min.

Room: Wisconsin Ballroom

Welcome and Agenda Review

Shawn Slavin – ITA President, Owasso, OK

ITA President Shawn Slavin will introduce our Summer ITL Meeting Committees and welcome everyone. He will also provide an overview of the Summer ITL Meeting agenda prior to introducing our Sunday Host Firm.

Host Firm Welcome and Executive Presentation

Room: Wisconsin Ballroom

Allen Smith – CIO, Baker Tilly, Madison, WI

Christine Dahlhauser - Managing Partner, Wisconsin - Baker Tilly, Madison, WI

Baker Tilly will welcome ITLers to Wisconsin and share an overview of Baker Tilly!

10:00am – 11:30am

Track – All CPE – 90 min.

Room: Capitol B

Academic Perspective On AI And Its Role In Accounting

Speakers from the University of Wisconsin School of Business:

Vallabh “Samba” Sambamurthy – Dean

Russell Epp - Senior Lecturer | Accounting and Information Systems

Dan Wangerin - Associate Professor | Accounting and Information Systems

Hear the perspectives from two academic leaders from the University of Wisconsin – Madison. In this session, we will hear these academic leaders’ thoughts and possible impacts of AI in the accounting industry. Questions that will be answered include current impact on curriculum, what are students using today as resources, where innovation in the industry is leading, and the impact on overall enrollment in accounting.

Disclosure: This description was created by a human being.

12:30pm – 1:45pm

Track – All CPE – 90 min.

Room: Wisconsin Ballroom

ChatGPT – Is Your Firm Ready?

Facilitator:

Danielle Gallo – CohnReznick, Roseland, NJ

Panel:

Yarri Bryn – Wipfi LLP, Minneapolis, MN

Matthew Humphrey – HCVT, Los Angeles, CA

Nicolas Torraca – CohnReznick, Roseland, NJ

Jahmall Weekes – Baker Tilly, New York, NY

ChatGPT is “scary good”: think internet-level disruption. It has been labeled as the fastest growing app of all time according to analysts. Individuals and industries are leveraging the technology for everything from composing emails, to writing code, to solving complex problems. It’s free and it’s easy, but is it good for your firm? In this panel session we will hear from firms that have begun their journey into the ChatGPT world. We will discuss where they are in their journey, if they have experienced the successes they hoped for, lessons learned, and if they have been brave enough to use it in their production environment.

2:00pm – 3:15pm

Track – Strategic CPE – 75 min.

Room: Capitol B

You Can’t Spell AICPA Without AI

Tom Hood – CEO MACPA & Business Learning Institute

Artificial Intelligence has the power to disrupt our industry while humanity grapples with some of the challenges it brings. We’ll hear from the AICPA to understand the impact on attestation in a world where ChatGPT, machine learning, and massive data lakes approach the traditional ‘opinion’ rendered by humans. We’ll discuss the changing role of accountants in this AI-powered world and how the AICPA is adopting new standards, tools, and training methods to keep us relevant.

Learning objectives:

- What is the current state of AI-powered deliverables?
- What risk considerations should be top of mind for firms as they consider AI-powered tools?
- What can firms do to update their training and education to prepare.

2:00pm – 3:15pm

Track – Tactical CPE – 75 min.

Room: Wisconsin Ballroom

Prompt Engineering - Ask Me No Questions And I’ll Tell You No Lies

Daniel Bauer – Hickman-Larson Chair in Actuarial Science in the Department of Risk and Insurance, University of Wisconsin School of Business, Madison, WI

In this panel discussion, we will explore the emerging importance of prompt engineering for AI. Our panelists will discuss what prompt engineering is and whether it is really an important new skillset or just more fodder for the AI hype cycle. We will discuss whether firms are looking at this skillset as part of their core technology teams, for their citizen technologists, or their entire firms. Join us for an informative and thought-provoking discussion that will help you make informed decisions about one of the hottest topics and fastest growing roles to consider as you leverage AI in your organization.

3:30pm – 4:45pm

Track – Strategic CPE – 75 min.

Room: Capitol B

Strategic Roundtables

Metrics Madness: The Good, The Bad, And The Ugly Of CIO Data Submission

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

Aaron Gray – CLA, Phoenix, AZ

In this session, we will review the metrics submitted by members with some general observations on trends and anomalies. During the roundtable sessions we will discuss:

- Best practices for collecting, analyzing, and presenting data.
- The importance of metrics in informing business decisions and driving organizational success, as well as the challenges and pitfalls that can arise when collecting and analyzing data.
- Experience on how to ensure data accuracy, avoid common mistakes, and effectively communicate metrics to key stakeholders.

By the end of the session, participants will have gained a deeper understanding of the value and importance of metrics, as well as practical strategies for improving the quality and reliability of their own data. Join us for a thought-provoking and informative session that will help you leverage metrics to make more informed and effective decisions.

3:30 – 4:45pm

Track – Tactical CPE – 75 min.

Room: Wisconsin Ballroom

Tactical Roundtables

The ever-popular ITL Tactical Roundtables for this Summer Collaborative will be those listed below along with the Table Leaders. Discussion topics will be provided for each table...or feel free to branch out on your own!

Table Leaders:

Infrastructure: *Chris Weber - CLA, Minneapolis, MN*

Service Delivery, Metrics and Support: *Tony Walton - Baker Tilly, Madison, WI*

Security/Compliance: *Andrew Young - Baker Tilly, Chicago, IL*

App Dev: *David Pitcovich - Cohen & Company, Akron, OH*

Project Management: *Curtis Shelton - CBIZ, Inc., Cleveland, OH*

Tuesday, July 25

8:30 – 10:00am

Track – ALL CPE – 90 min.

Room: Capitol B

IT Unlocking The Mysteries Of Managing New Technology Adoption

Birgit Benson – CLA, Minneapolis, MN

Joe Miles – CBIZ, Inc., Independence, OH

Nathan Oglesby – CBIZ, Inc., Kansas City, MO

Curtis Shelton – CBIZ, inc., Cleveland, OH

During this session, you will learn practical strategies for managing the new technology adoption process in a way that's efficient, effective, and painless. We'll cover topics such as how to evaluate new technology, how to train your team on new systems, and how to troubleshoot common problems that arise during the adoption process. With our expert guidance, you'll be able to stay ahead of the curve and ensure that your business stays relevant in the digital age. Don't miss this opportunity to master the art of technology adoption and take your business to the next level!

10:30am - Noon

Track – Strategic CPE – 75 min.

Room: Capitol B

Governance And AI - How To Adapt To AI Generally And Specifically ChatGPT

Facilitator:

Thanigs Muthu – LBMC, PC, Brentwood, TN

Panelist(s):

Robert Neill – Weaver, Austin, TX

As new technologies emerge, it brings new challenges that require a new set of governance to create a level playing field for everyone. With the growing implementation of Artificial Intelligence (AI), specifically Generative AI, what new challenges are you facing? ChatGPT as a disrupter is creating new opportunities but what governance framework do you need to be aware of as an early adapter? During this session, we will discuss the challenges, opportunities, and governance around Generative AI.

Learning Objectives:

- Learn about the governance frameworks adopted by our ITA member firms?
- Who is developing regulations and laws that govern the development and use of generative AI systems?
- What Certifications and Standards are available?

10:30am - Noon

Track – Tactical CPE – 75 min.

Room: Wisconsin Ballroom

Questions, Questions, And More Questions – Handling Due Diligence Questionnaires

Facilitator:

Michael Tylicki – Cohen & Company, Cleveland, OH

In this roundtable discussion, we will explore the wonderful world of due diligence questionnaires and how firms are approaching them. From ESG (Environment, Social, Governance) Disclosures to Data Privacy Certifications, technology teams are being asked to answer more questions from clients and prospects every day. Add in due diligence that firms perform on potential (as well as current) vendors and handling all these questions and answers can be daunting. This roundtable discussion will create a forum for sharing insights how firms are managing this work, the types of questions that people are seeing today, and what's next in our clients' insatiable search for information about us.

1:15pm – 2:45pm

Track – Strategic CPE – 90 min.

Room: Capitol B

Keeping The Natives From Becoming Restless

Kevin Sexton – Cohen Company, Cleveland OH

In this roundtable session, we will explore how we are managing the demands of our CAS, Advisory, and citizen developer stakeholders. This session is a follow up to the Spring Collaborative joint session with CAS while also looking at our support of the similarly innovative/multidimensional/rogue parties within our consulting practices and technophiles outside our IT teams. Join your peers in a lively discussion about topics like:

- What governance processes have teams put in place to better manage the relationship and technology needs of CAS and Advisory?
- How are we helping the business to establish standard ways of working while also supporting the need to be responsive to end client needs and wishes?
- How we are handling the pressures from the business to drive/enable innovation while also maintaining a stable, secure, and cost-effective environment?
- How we support moonshot thinking while also providing necessary reality checks?

1:15 – 2:45pm

Track – Tactical CPE – 90 min.

Room: Wisconsin Ballroom

Compliance Frameworks

Facilitator:

Matt Jennings – Baker Tilly, Madison, WI

Panelists:

Brian Hunter - FORViS, Springfield, MO

Robert Jamison - Elliott Davis, LLC, Greenville, SC

Rob Lewis - RubinBrown LLP, St. Louis, MO

Many of our member firms have chosen to adopt compliance frameworks in our practices. While the reasons may vary, we all face the same challenges in aligning with business objectives, choosing the appropriate framework(s) and changing our approach to meet the often stricter operational demands of these industry standards. In this session, you'll hear from three member firms regarding their journey, the business drivers, and lessons learned.

3:00pm – 4:30

Track – Strategic CPE – 90 min.

Room: Capitol B

Strategic Roundtables

How Risky Is Your Business (Partner) – Managing Third Party Risk

Angela Cooley – CohnReznick, Atlanta, GA

Legal and Compliance leaders named third party risk as a top threat to their organizations. In fact, per Gartner, 83% of executives have stated that third party risks were identified after initial onboarding and due diligence. As these external partnerships become increasingly complex, the need for a new vendor risk management approach is clear. The rapidly changing business environment demands new approaches to third party risk management that account for the new ways that organizations rely on third parties to advance business goals. In this roundtable session we will discuss how firms are addressing items like:

- Vendor Risk Management (VRM) framework (IT and/or Enterprise based)
- Identification and prioritization of risk
- Ensuring/Enforcing vendor compliance to your firms' risk appetite
- What do you do when a vendor will not comply

3:00 – 4:30pm

Track – Tactical CPE – 90 min.

Room: Wisconsin Ballroom

Tactical Roundtables

Dena Plotter – CLA, New Ulm, MN

The ever-popular ITL Tactical Roundtables for this Summer Collaborative will cover ChatGPT, BARD, and other AI related topics. This will be a recap of the conference and an opportunity to cover details not addressed.

4:30 – 4:45pm

Track – All

Room: Wisconsin Ballroom

Closing Discussion and Adjourn

Shawn Slavin – ITA President, Owasso, OK



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NASBA Registry Information

Credit Hours: Up to 15 Hours of CPE available. CPE credits are granted on a 50-minute hour. After the first hour, sponsors can report half-credits. **However**, half-credits are not allowed / approved in all states. If half-credits are **not** allowed, participants need to round back to the last full credit.

Learning Objective: Depending upon the sessions you choose to attend, you will learn best practices and hear what other industry leaders are doing with respect to: current and emerging technologies, practice and project management, staffing, marketing, and customer/client service.

Program Content: The program will feature three tracks of educational content: Internal IT for large CPA Firms and Technology Product, Support and Service Updates/Discussions. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member firms to be more successful.

Field of Study:

Business Management and Organization

Level – Update

Prerequisites – Minimum 3 Years as an IT Consultant or Technician

Advance Preparation – None

Instructional Delivery Method – Lecture & Discussion

NASBA Registry of CPE Sponsors

Information Technology Alliance (#107740) is registered with the National Association of State Boards of Accountancy

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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 57605 , Telephone (480) 515-2003.