



April 20-22, 2020
Westin Savannah Harbor, Savannah, GA

Monday, April 20

1:00 PM	3:00 PM	Optional Volunteer Events
2:30 PM	5:00 PM	Badge Pickup - Location
3:30 PM	4:30 PM	Meet, Greet & Eat Session for New Members and First Timers - Location
4:30 PM	6:00 PM	GENERAL SESSION - Location President's Welcome - Shawn Slavin, ITA President Keynote: Leading With Questions: How True Leaders Inquire As A Means To Inspire - Warren Berger
6:00 PM	7:30 PM	Monday Night Welcome Reception - Location
7:30 PM		Dinner On Your Own and Various Partner Events

Tuesday, April 21

7:00 AM	5:00 PM	Badge Pickup - Location				
7:00 AM	8:00 AM	Breakfast - Location				
8:00 AM	9:30 AM	GENERAL SESSION - Location ITA's Leadership Alliance (ILA) Graduation Recognition - Shawn Slavin, ITA President Keynote: Enterprise Artificial Intelligence (AI) – The Next Steps in Analytics - Timothy Chou				
MONDAY WORKSHOPS		WORKSHOP 1 Location TBD	WORKSHOP 2 Location TBD	WORKSHOP 3 Location TBD		ITL CIO ACADEMY Location TBD <i>Closed Session for ITL CIOs or Their Designee – One Per Firm</i>
10:00 AM	12:00 PM	Tim Chou Moving To The Cloud Workshop	Warren Berger Tapping Into The Power Of "How Might We" Questions	Doug Butdorf Higher Profits Through Better Pricing Workshop		Peter High TBD
12:00 PM	1:15 PM	Lunch - Location				
1:15 PM	3:15 PM	Tim Chou Moving To The Cloud Workshop	Warren Berger Tapping Into The Power Of "How Might We" Questions	Doug Butdorf Higher Profits Through Better Pricing Workshop		Peter High TBD
3:30 PM	5:00 PM	Say It Like You Mean It	Build a Better Network	CAS Roundtable <i>(with CIO ITL Strategic Roundtables)</i>	ITL Tactical Roundtables	ITL Strategic Roundtable <i>(with CAS Roundtable)</i>
6:00 PM	9:00 PM	Evening Dinner Party - Location				

Wednesday, April 22

7:00 AM	8:00 AM	Breakfast - Location				
TRACKS & SESSIONS	Consulting & Reselling (CR)			Client Accounting & Advisory Services (CAS)	Internal Tech Leaders Sessions (ITL)	
	CR TRACK 1 & Combined Location TBD	CR TRACK 2 Location TBD		Location TBD	ITL TACTICAL Location TBD	ITL STRATEGIC Location TBD
8:00 AM	9:15 AM	Cybersecurity Best Practices – Stop Panicking, Start Planning	Competition Is For Losers!	Pricing And Upselling	Microsoft 365 Security Suite: The Ring Of Truth Or Another Circle Of Fire?	Privacy Law - The Impact Of One Less "I"
9:30 AM	10:45 AM	Tools Of The Trade – Enhancing Your Productivity	Herding Cats In A Dog-Eat-Dog World	Roadblocks To Building A CAS Practice –The Traditional Firm	Security Governance: Prepare To Have Your SOCs Blown Off!	Client Digital Experience
11:00 AM	12:15 PM	How Strategy Is The Make OR Break Requirement Of Your Marketing!	Subscription Service Offerings In A CR Practice	Off-Shoring	It CAN Happen To You – What Is Your Incident Response Plan?	Risk Management
12:15 PM	1:30 PM	Lunch - Location				
1:30 PM	3:00 PM	Master Your Impact: How Presentation Skills & Body Language Can Drive Success	CR Roundtables	Technology Roundtables	ITL Tactical Roundtables	ITL Strategic Roundtable: Data Security And Offshore Personnel
3:00 PM	3:15 PM	CR Wrap Up Session - Location		CAS Wrap Up Session	ITL Wrap Up Session - Location	

Thursday, April 23

8:30 AM	3:00 PM	ITA Leadership Alliance (ILA) Base Camp (Note: Separate Registration required) - Location
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Session Descriptions and Speakers

Consulting & Reselling – CR

Client Accounting & Auditing Services - CAS

Internal Technology Leader Tactical – ITL-T

Internal Technology Leader Strategic – ITL-S

Monday, April 20 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)

4:30 – 4:45 pm

President's Welcome

Location TBD

Shawn P. Slavin – ITA President, Owasso, OK

ITA President Shawn Slavin will introduce our Spring Collaborative Committees and welcome our new members and guests. He 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)

Leading With Questions: How True Leaders Inquire As A Means To Inspire

Location TBD

Warren Berger – Innovation Speaker, Author, Journalist Questionologist, Mount Kisco, NY

What do today's most creative, successful business leaders have in common? According to research shared in this presentation; today's top leaders are invariably great questioners. By asking the right questions, they are able to help their organizations anticipate change and move in new directions. But it isn't easy for leaders to embrace questioning (traditionally, leaders have been expected to "have the answers"). In this presentation, geared specifically to those in leadership or mid-to-senior management roles, Warren talks about the evolution of the new "questioning leader" in these times of greater complexity and uncertainty. He shows how great leaders are able to find the best questions to ask—and how they can inspire those around them to question more and better.

Tuesday, April 21 – 8:00 – 9:30 am - Monday Morning General Session & Keynote (70 CPE Minutes)

8:00 – 8:20 am

ITA's Leadership Alliance (ILA) Graduation

Location TBD

Shawn Slavin – ITA President, Owasso, OK

ITA President Shawn Slavin will present the 2019-20 Class of the ITA's Leadership Alliance (ILA) with their graduation certificates.

8:20 – 9:30 am (70 CPE Minutes)

Enterprise Artificial Intelligence (AI) – The Next Steps In Analytics

Location TBD

Timothy Chou - Former President of Oracle, Current Board Member of Blackbaud and Teradata, Stanford University, Palo Alto, CA

Enterprise Artificial Intelligence (AI) has had significant advances in the past couple years. Whether it be Alexa voice recognition or Facebook facial recognition it's happening faster than anyone predicted. What does this mean for Enterprise Computing? This talk will focus on the three significant changes in neural networks, deep learning and the machine learning life cycle that have enabled these amazing leaps. Dr. Chou will show you how the next generation of enterprise analytics will be based on Artificial Intelligence and not Business Intelligence.

Deep Dive Workshops

Tuesday, April 21 - 10:00 am – 3:15 pm (with lunch from Noon to 1:15) – (240 CPE Minutes)

WORKSHOP 1: Moving To The Cloud

Location TBD

Timothy Chou - Former President of Oracle, Current Board Member of Blackbaud and Teradata, Stanford University, Palo Alto, CA

WORKSHOP 2: Tapping Into The Power Of “How Might We” Questions

Location TBD

Warren Berger – Innovation Speaker, Author, Journalist Questionologist, Mount Kisco, NY

As Warren learned in his work for Harvard Business Review, a number of innovative companies such as Google and IDEO have a secret weapon they use—asking “How Might We” questions, as a group or in teams, to tackle problems and innovate together. In this workshop, Warren shows participants why HMW questions are so powerful, and how to formulate and continually improve those questions, while working in small or large groups.

WORKSHOP 3: Higher Profits Through Better Pricing

Location TBD

Doug Butdorf – Speaker and Profit Evangelist, Boost, Greater NY Area, NY

In this highly interactive presentation, Douglas Butdorf launches participants onto a path to improve pricing, dramatically increase profits, and grow sales. He delivers impactful content in an interactive and entertaining format, using real-world stories and relevant exercises. Key topics include:

- Power of Pricing & Discounting
- Price Sensitivity & Segmentation
- Value-Based Pricing

WORKSHOP 4: CIO Academy (Topic in Development)

(Closed Session for ITL CIOs or Their Designee – One Per Firm)

Location TBD

Peter High – President, Metis Strategy, LLC, Chevy Chase, MD

Concurrent Sessions – By Date and Time

Tuesday, April 21 – 3:30 – 5:00 pm - (90 CPE Minutes)

CR-1

Say It Like You Mean It

Location TBD

Julie Fitzpatrick - Lighthouse Pt, FL

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

Understand how to communicate to different personality styles

- Recognize Barriers to Communication
- Practice Empathetic Listening Skills
- Compare Methods of Communication
- Create Clear and Effective Messages

CR-2

Build A Better Network

Location TBD

Moderators:

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

Arlene Welty - DataQuest, Inc., Chicago, IL

Want to get the most from ITA this spring? Come talk to the other nerds! Manifesting the ITA value proposition that “Knowledge increases in value when shared,” this session will give you the skills to approach other people, exchange ideas, and build community (aka networking). In this session you will learn to overcome your fear of approaching strangers and asking them for things. Come get some practice networking within the ITA community before you have to go do it in the real world. Great for newbies, shy people, and introverts. Bring your business cards. This will be fun and highly interactive- expect to learn something from everybody in the room.

CAS – 1

ITL-S

CAS Roundtable (with ITL Strategic Roundtables)

Location TBD

ITL-T

ITL Tactical Roundtables

Location TBD

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

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

ITL-S

ITL Strategic Roundtables (with CAS Roundtable)

Location TBD

Our ITL Strategic Roundtables provide an opportunity for the ITL CIOs to discuss current topics and issues with their peers. The roundtable makeup, format and topics is determined by the Spring ITL Planning leaders and will be distributed to the participants prior to the session.

Wednesday, April 22 – 8:00 – 9:15 am - (75 CPE Minutes)

CR-1

Cybersecurity Best Practices – Stop Panicking, Start Planning

Location TBD

Kristen Dennesen - Director - Cyber Threat Intelligence, Sony Pictures Entertainment, Culver City, CA

Your customer just called: “We’ve been hacked.” Your brain thunders down a panic-storm of anxiety and recriminations. Even if you’re not their security expert, you still may be the one captaining the rescue. In this session, you’ll learn from our ITL partners how to right the ship in the event of an attack, and how to prevent them with strong security measures. In this session you will learn:

- How to help a customer in the event of a hack, malware, or ransomware
- Identifying leading questions to ask to identify if customers are at risk
- Tips for evaluating IT/Security firms to assess their sophistication level with security
- Identify what software to utilize for malware threats
- Best practices for data backup
- Resources for educating customers on recognizing phishing threats, using passwords, and avoiding dangerous applications

CR-2

Competition Is For Losers!

Location TBD

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

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

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

CAS - 2

Pricing And Upselling

Location TBD

ITL-T

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

Location TBD

Moderator:

Dee Dutton – Whitley Penn, Fort Worth, TX

Panelists:

TBD

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

ITL-S

Privacy Law - The Impact Of One Less "I"

Location TBD

Moderator:

Shawn M. Gerlach – CLA, Greenwood Village, CO

Panelists:

TBD

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

CR-1

Tools Of The Trade – Enhancing Your Productivity

Location TBD

Panel

As consulting reseller firms, we face daily challenges in project management, scheduling, time and expense tracking, billing and more. This is extending the Fall 2019 Collaborative session on controlling projects using Smartsheet by presenting additional productivity tools currently used by member firms. Join us as your peers discuss common problems that we all face and the tools they use to help manage them. Learn how these productivity tools address these issues, how they were deployed and hear tips and tricks to best leverage these tools.

CR-2

Herding Cats In A Dog-Eat-Dog World

Location TBD

Moderator:

April Blankenship – Altec, Laguna Hills, CA

Panelists:

Kim Austin – Intuit, Irvine, CA

Manny Buigas - BAASS Business Solutions Inc., Miami, FL

Stacy Schuettler - LBMC Technology Solutions, Brentwood, TN

Scott Schimberg – Armanino, San Ramon, CA

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

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

CAS - 3

Roadblocks To Building A CAS Practice –The Traditional Firm

Location TBD

ITL-T

Security Governance: Prepare To Have Your SOCs Blown Off!

Location TBD

Moderator:

Chris Morrow – Warren Averett, Birmingham, AL

Speakers:

Dustin Smith – Warren Averett Birmingham, AL

Scott Pruitt – Warren Averett, Birmingham, AL

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

ITL-S

Client Digital Experience (Topic in Development)

Location TBD

Moderator:

JD Stotts – Whitley Penn, Fort Worth, TX

Wednesday, April 22 – 11:00 am – 12:15 pm - (75 CPE Minutes)

CR-1

How Strategy Is The Make OR Break Requirement Of Your Marketing!

Location TBD

Panelists:

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

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

Others TBD

Are your marketing results currently as successful as they should be? Defining an effective strategy for your marketing is the linchpin in creating success. However, understanding your strategy and what is going to be required is not an adhoc process. Strategy requires data and market validation. Strategy will guide your marketing execution as Michael Porter stated, "Strategy is defined by what you say no to." This session will focus on some key areas that can help with your success including:

- What's the strategy definition process?
- What should your strategy include?
- What should you consider in your strategy?
- What are some of the common mistakes made in defining a marketing strategy?
- How do you successfully transition from your strategy to the next steps of your marketing plans?

CR-2

Subscription Service Offerings In A CR Practice

Location TBD

Moderator:

Dom Pernai – ETHOSystems, Chicago, IL

Panelists:

Karon Riordan – Ssi Consulting, Vienna, VA

Others TBD

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

- Set proper customer expectations
- Implementation concerns
- Identify additional revenue opportunities
- Customer system reviews
- Pricing these services

CAS - 4

Off-Shoring

Location TBD

ITL-T

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

Location TBD

Moderator:

Jan Milden – Plante Moran, Southfield, MI

Panelists:

TBD

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

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

ITL-S

Risk Management (Topic in Development)

Location TBD

Panel

Data Retention, Data destruction, Service Level agreements, Acceptable Use Policies, How are you accessing cloud security and providers, SaaS provider agreements, responding to client security assessments and SOC audit requests.

Wednesday, April 22 – 1:30 – 3:00 pm - (90 CPE Minutes)

CR-1

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

Location TBD

April Blankenship – Altec, Laguna Hills, CA

Lynn Henslee - e2b technologies, Inc., Chardon, OH

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

In this session you will learn:

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

CR-2

CR Roundtables (Topic In Development)

CAS

Technology Roundtables

Location TBD

ITL-T

ITL Tactical Roundtables

Location TBD

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- **Infrastructure/Engineering** – *Edward F. Kim, HCVT, Los Angeles, CA*
- **Service Delivery, Metrics and Support** – *Scott Pruitt, Warren Averett, Birmingham, AL*
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ITL-S

ITL Tactical Roundtable: Data Security and Offshore Personnel

Location TBD

Moderator:

Steven Cook – HCVT, Los Angeles, CA

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

Steven Cook emailed the CIO group inquiring about how restrictive firms are in terms of the data security for offshore personnel, and this topic generated significant response. Some of the planned discussion areas will include:

- Interpretations of Revenue Code Section 7216 requirements (e.g., offshore personnel cannot access data for individual clients that haven't consented and business clients that have not be notified, but they can see folders or binders that may include the client's name)
- Different approaches to restricting access domestically (e.g., is security trimming at the client level, office level, practice level, firm level?)
- Different approaches to restricting access for offshore personnel (e.g., separate v. single environment, security trimming at client level, etc.)

Wednesday, April 22 – 3:00 – 3:15 pm

Wrap Up Sessions & Adjournment of the ITA Spring Collaborative

CR

Location TBD

Facilitator: *Lissa Johnsen, ITA Vice President*

CAS

Location TBD

Facilitator: *Shawn Slavin, ITA President*

ITL

Location TBD

Facilitators:

David Hirschhorn – Eide Bailly LLP, Fargo, ND

JD Stotts – Whitley Penn, Fort Worth, TX



NASBA Registry Information

Credit Hours: Up to 15.5 hours of CPE available. CPE credits are granted on a 50-minute hour. After the first hour, sponsors can report half-credits. **However**, half-credits are not allowed / approved in all states. If half-credits are **not** allowed, participants need to round back to the last full credit.

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

Program Content: The program will feature three tracks of educational content: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and IT Client Infrastructure & Managed Services Consulting. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member clients or their businesses to be more successful.

Field of Study:

Business Management and Organization

Level – Update

Prerequisites – Minimum 3 Years as an IT Consultant or Technician

Advance Preparation – None

Instructional Delivery Method – Lecture & Discussion

NASBA Registry of CPE Sponsors

Information Technology Alliance (#107740) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Administration

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