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

Monday, April 20

Start	End	Event
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

Start	End					
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 *Closed Session for ITL CIOs or Their Designee – One Per Firm*
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 Session 1**	**ITL Tactical Roundtables**	**ITL Strategic Roundtable: Data Security And Offshore Personnel**
6:00 PM	9:00 PM	**Evening Event -** Location				

Wednesday, April 22

Start	End					
7:00 AM	8:00 AM	**Breakfast -** Location				
TRACKS & SESSIONS		**Consulting & Reselling (CR)**		**CLIENT ACCOUNTING & ADVISORY SERVICES (CAS)** Location TBD	**Internal Tech Leaders Sessions**	
		CR TRACK 1 & Combined Location TBD	**CR TRACK 2** Location TBD		**ITL TACTICAL** Location TBD	**ITL STRATEGIC** Location TBD
8:00 AM	9:15 AM	**Cybersecurity Best Practices – Stop Panicking, Start Planning**	**Marketing Is All About Competition**	**CAS Session 2**	**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 TheTrade – Enhancing Your Productivity**	**Herding Cats In A Dog-Eat-Dog World**	**CAS Session 3**	**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**	**CAS Session 4**	**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**	**CAS Roundtables**	**ITL Tactical Roundtables**	**ITL Strategic Roundtables**
3:00 PM	3:15 PM	**CR Wrap Up Session -** Location		**CAS Wrap Up Session**	**ITL Wrap Up Session -** Location	

Thursday, April 23

Start	End	Event
8:30 AM	3:00 PM	**ITA Leadership Alliance (ILA) Base Camp (Note: Separate Registration required) -** Location

ITA SPRING 2020
SAVANNAH GEORGIA
COLLABORATIVE

ita

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

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 or 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 or 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*
> *Arline 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 word. 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
Topic in Development
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**
- **Service Delivery, Metrics and Support**
- **Project Management** – *Kevin Fraase, Eide Bailly LLP, Fargo, ND*
- **Security/Compliance** – *Paul Olson, Eide Bailly LLP), Fargo, ND*

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.

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

CR-1
Cybersecurity Best Practices – Stop Panicking, Start Planning
Location TBD

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

Marketing Is All About Competition

Location TBD

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

Winning or losing is not about marketing execution of procuring signage, creating amazing graphics, scheduling resources for show, tweeting, sending emails, hosting webinars or any number of other marketing activities. Marketing is about winning mind share. The battle for the mind is where your business model begins. And the market doesn't care about table-stakes. The market cares about differentiation. Why you?! So how do you compete? Is your marketing destined for success or doomed to failure? Come to this session and learn a framework for defining and promoting your difference.

CAS - 2

Topic in Development

Location TBD

ITL-T

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

Location TBD

Panel

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

Panel

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.

Wednesday, April 22 – 9:30 – 10:45 am - (75 CPE Minutes)

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***:*
> *TBD*
> **Panelists:**
> *Stacy Schuettler - LBMC Technology Solutions, Brentwood, TN*
> *Manny Buigas - BAASS Business Solutions Inc., Miami, FL*
> *Scott Schimberg – Armanino, San Ramon, CA*
> *Others TBD*

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

Topic in Development

Location TBD

ITL-T

Security Governance: Prepare To Have Your SOCs Blown Off!

Location TBD

> **Panel**

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

> **Panel**

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*:*

TBD

Panelists:

Karon Riordan – Ssi Consulting, Vienna, VA

Others TBD

Most of you are already experts is pricing and selling subscription software products. In this session, we will explore pricing those products to include services. In a new world were 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
Topic in Development
Location TBD

ITL-T

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

Location TBD

      Panel

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

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

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

CAS Roundtables

Location TBD

ITL-T
ITL Tactical Roundtables
Location TBD

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- **Application Development –** *Grant Rufus, Eide Bailly LLP, Fargo, ND*
- **Infrastructure/Engineering**
- **Service Delivery, Metrics and Support**
- **Project Management –** *Kevin Fraase, Eide Bailly LLP, Fargo, ND*
- **Security/Compliance –** *Paul Olson, Eide Bailly LLP), Fargo, ND*

ITL-S
ITL Strategic Roundtables
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 – 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
> **Facilitator:** *TBD*

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

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