

MONDAY - WEDNESDAY
APRIL 26-28, 2021



Monday, April 26

Tracks & Sessions (all times are Eastern)		ALL MEMBERS - KEYNOTES and WORKSHOPS	
10:40 AM	12:00 PM	Monday Opening Session STATE OF THE ASSOCIATION: Shawn Slavin, ITA President KEYNOTE: Tim Chou "Star Trek or Terminator Future?"	
12:15 PM	2:15 PM	WORKSHOP 1: Moving To The Cloud Tim Chou	WORKSHOP 2: Higher Profits Through Better Pricing Doug Butdorf
2:15 PM	2:45 PM	Break	Break
2:45 PM	4:45 PM	WORKSHOP 1 CONTINUED: Moving To The Cloud Tim Chou	WORKSHOP 2 CONTINUED: Higher Profits Through Better Pricing Doug Butdorf
7:00 PM	8:30 PM	Social Activity - Virtual Murder Mystery	

Tuesday, April 27

11:00 AM	12:00 PM	KEYNOTE: Warren Berger "Leading With Questions: How True Leaders Inquire As A Means To Inspire"	
12:15 PM	2:15 PM	WORKSHOP 3: Tapping Into The Power Of "How Might We" Questions Warren Berger	CIO ACADEMY: Project to Product Peter High <i>ITL CIOs Or Designees ONLY</i>
2:15 PM	2:45 PM	Break	Break
2:45 PM	4:45 PM	WORKSHOP 3 CONTINUED: Tapping Into The Power Of "How Might We" Questions Warren Berger	CIO ACADEMY CONTINUED: Project to Product Peter High <i>ITL CIOs Or Designees ONLY</i>
7:00 PM	8:30 PM	Social Activity - Taco Tuesday Virtual Cooking Class	

Wednesday, April 28

11:00 AM	12:00 PM	KEYNOTE: David Cieslak "Inspector Gadget"			
Tracks & Sessions (all times are Eastern)		CR TRACK	ITL Strategic	ITL Tactical	CAS Track
12:15 PM	1:15 PM	The Journey to Adopting the Subscription Business Model: Avoiding the Potholes - Panel	Maintaining An Innovation Focus Strategic Roundtable <i>(CIO's and their Designees ONLY)</i>	Cloud Cost Optimization - Rightsizing Your IaaS Platform	Why You Shouldn't Run Your CAS Practice Like An Audit Or Tax Practice
1:30 PM	2:30 PM	The Journey to Adopting the Subscription Business Model: Avoiding the Potholes - Roundtables	Psychology Of Technology	Privacy And Artificial Intelligence	Specialization In CaaS
3:00 PM	4:00 PM	Driving Opportunity In The "New Normal": The Strategy, Tactics, And Execution Of Generating Leads Across Every Role in the Firm – Session 1	Career Paths And Compensation Models In CPA - IT <i>(CIO's and their Designees ONLY)</i>	Managing Client Data Internally. Data Retention. Data Classification	Three Different Levels Of A CAS Practice - Understanding Where You Are And Deciding Where You Want To Be
4:15 PM	5:15 PM	Driving Opportunity In The "New Normal": Marketing Tools and Tactics – Session 2	Are You Ready For The Rise Of "Citizen Development"?	Tactical Roundtables <i>(See Session Descriptions for FIVE Different Breakouts)</i>	Structuring Your CaaS Leadership Team

Monday, April 26 through Wednesday, April 28

You pick a time!	Social Activity - ITA Fitness Challenge
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Session Descriptions & Speakers

All – Everyone is Welcome

CR = Consulting & Reselling

CAS = Client Accounting Advisory Services (CaaS)

ITL-T = Internal Technology Leader - Tactical

ITL-S = Internal Technology Leader - Strategic

ITL-R = Internal Technology Leader - Roundtable

Monday, April 26

ALL

10:40 am – 11:00 am ET

President's Welcome & Introductions

Shawn P. Slavin – ITA President, Owasso, OK

ITA President Shawn Slavin will introduce our Virtual Collaborative Committees, welcome our new members and guests, provide an overview of the agenda and help navigate our Virtual Environment. In addition, he will update the membership on “what’s happening” in ITA and provide an overview of some of the ITA Board of Director’s strategic initiatives for the 2021 year.

ALL

11:00 am – 12:00 pm ET (60 CPE)

Keynote: Star Trek or Terminator Future?

Timothy Chou - Former & Only President of Oracle and Current Chairman, Alchemist Accelerator; Stanford University, Palo Alto, CA

Since 2000 technology has been accelerating. It's changed how we buy things, meet friends, and watch movies. But increasingly we're seeing a dark side. Will a machine replace my job? How do I know if the person talking is real? Can I trust artificial intelligence? Should I be worried America is falling behind? Does our future look like a Terminator future? Or is it a Star Trek future?

Before you can answer that question it's important to understand the technology that is shaping the future. This keynote will focus on five technologies: Cloud Computing, 5G, Internet of Things, Edge Computing and Artificial Intelligence. This talk will help you understand what is real, what is hype and why it's important.

We'll end with how these five technologies could reshape children's healthcare globally and leave you with the question: Do you see a Terminator future or a Star Trek future?

ALL

12:15 – 2:15 pm ET (120 CPE)

2:45 – 4:45 pm ET (120 CPE)

Workshop 1: Moving To The Cloud

Timothy Chou - Former & Only President of Oracle and Current Chairman, Alchemist Accelerator; Stanford University, Palo Alto, CA

Join us for an afternoon of exploration and discovery. In this four-hour workshop, Tim Chou will lead us on a whirlwind tour of transformative technologies, including 5G, Cloud Computing, the Internet of Things, Edge Computing, Artificial Intelligence and Neural Networks, Data Privacy, and Digital Transformations. What are they, and why do they matter? Who can benefit from them and how. Tim's coverage will include quick overviews, reviews of critical takeaways, recorded interviews with key players in each technology, and group conversations to help attendees walk away with a deeper understanding

ALL

12:15 – 2:15 pm ET (120 CPE)

2:45 – 4:45 pm ET (120 CPE)

Workshop 2: Higher Profits Through Better Pricing

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

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



7:00 – 8:30 pm ET - OPTIONAL EVENT

MURDER MYSTERY SHOW – *Bullets In The Bathtub*

No Cost for the Event. **Registration IS NECESSARY**

Join us for the ITA Virtual Murder Mystery Show: *Bullets In The Bathtub*! Lots of gangsters are showing up at “Cherry’s Speakeasy” to talk about the turf war going on between the Corneolis and the Buttafuccos. Just when we think things are going to settle down, in comes Harry Hyde, (the famous Russian mobster). He sure does know how to make enemies! Deadly ones! Take part in the SHOW or not. Lots of fun either way! No cost for this optional event. **Pre-registration for this optional event is mandatory.**

[To Register directly](#)

[Full Social Information](#)



OPTIONAL EVENT

ITA FITNESS CHALLENGE

No Cost for the Event or for the Participant TShirt

Sitting on Zoom meetings all day long can be a drain on your mind and body. It’s time to get up and move! You are invited to participate once gain in the our ITA Virtual Fitness Challenge. Join the ITALand Facebook group and post your goal.

[To Register and for Full Information](#)

Tuesday, April 27

ALL

11:00 am – 12:00 pm ET (60 CPE)

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

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.

ALL

12:15 – 2:15 pm ET (120 CPE)

2:45 – 4:45 pm ET (120 CPE)

Workshop 3: Tapping Into The Power Of “How Might We” Questions

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.

CIO's And Their Designees ONLY

12:15 – 2:15 pm ET (120 CPE)

2:45 – 4:45 pm ET (120 CPE)

CIO Academy: Project to Product

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

A Discussion about the move from project to product orientation of IT departments. This has been a major theme we have seen through Metis Strategy, and Peter High will speak to the background on the change and the method to do this effectively.



7:00 – 8:30 pm ET - OPTIONAL EVENT

TACO TUESDAY VIRTUAL COOKING CLASS

No Cost. **Registration IS NECESSARY**

[To Register and for Full Information](#)

Nothing jazzes up a Tuesday more than Margaritas and Tacos! Let's get out of the office and into the kitchen! Have your family/friend/roommate join you in this live interactive online cooking class with Chef Vivian and Michi. You will add a contemporary gourmet twist to some authentic Mexican flavors. Create vegetarian tacos loaded with shiitake mushrooms and topped with tangy pineapple salsa, and ribeye steak tacos featuring white cheese and jalapeños. They're the perfect pairing for your traditional lime margarita! (Feel free to make substitutions of your choice).

- The Cooking class is fully interactive.
- The Chef accompanies you throughout the entire process.
- Ask as many questions as you want!

No cost for this optional event...Just the cost for the **ingredients that you will need to buy in advance**. Pre-registration for this optional event is mandatory.



OPTIONAL EVENT

ITA FITNESS CHALLENGE

No Cost for the Event or for the Participant TShirt

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[To Register and for Full Information](#)

Wednesday, April 28

All

11:00 am – 12:00 pm ET (60 CPE)

Keynote: Inspector Gadget

David Cieslak – SVP, Chief Cloud Officer, RKL eSolutions LLC, Simi Valley, CA

The year 2020 required each of us to quickly pivot and transform virtually all aspects of our personal and professional lives. Working from home, video meetings and the elimination of business travel became the “new normal” in just a few day’s times. But these significant changes also presented tremendous opportunity for innovation and digital transformation. Join Inspector Gadget has he examines the latest technology and products supporting these rapid changes, and explore what’s next. Technology has never been more critical and impactful than it is today. Make certain you have the essential details you need to navigate your next steps.

CR

12:15 pm – 1:15 pm ET (60 CPE)

The Journey To Adopting The Subscription Business Model: Avoiding the Potholes - Panel

Moderators:

Annette Manias – Oasis Systems Group, Louisville, KY

Tony Merry – ETHOSystems, Scottsdale, AZ

Panelists:

Nick Brorson – Sockeye, Anchorage, AK

Brian Terrell – BTerrell Group, LLP, Addison, TX

Whether you are converting to a Services as a Subscription model or conflicted on if you should adapt compensation models to subscription sales, you may feel you are traveling down a bumpy road and are not sure where it leads. Attend this session and spend time hearing from of your peers who have traveled this road before you and are happy to share their personal journeys. They will be discussing their experiences, the twists and turns along the way, and the valuable lessons they have learned. In addition, they will provide insights into what they would have done differently to help you better navigate the road ahead. Panelists will discuss and attendees will learn:

- What have been the impacts, both positive and negative, of moving to a Services as a Subscription model?
- What changes if any were made to commission and bonus compensation models and financial KPIs?
- If they could course correct and hit “renavigate”, what would they do differently to avoid potholes?
- Has this new services model created the need for any new roles within the organization (Customer/Client Success Manager, additional administrators to handle renewals, etc.)?

CIO's And Their Designees ONLY

ITL-S

12:15 pm – 1:15 pm ET (60 CPE)

Maintaining An Innovation Focus Strategic Roundtable

David Emmer - Anchin, Block & Anchin LLP, New York, NY

Join the ITL strategic discussion on fostering an innovative firm and team. How do you help to maintain an innovation focus at your firm? What governance is in place to insure successful initiatives? Reminder - participation in Strategic roundtables are limited to ITL CIO and their designated firm representatives only. Thank you for your cooperation.

ITL-T

12:15 pm – 1:15 pm ET (60 CPE)

Cloud Cost Optimization - Rightsizing Your IaaS Platform

Facilitator:

Patrick Powers – Crowe LLP, South Bend, IN

Panelists:

Josh Anderson - Wipfli LLP, Eau Claire, WI

Jeff Craig – Crowe LLP, South Bend, IN

Amel Edmond - WithumSmith+Brown, Red Bank, NJ

Old habits die hard. For On-Premises systems, seasoned IT Infrastructure personnel may be accustomed to buying and provisioning servers and storage infrastructure which may be sized to handle peak utilization and/or projected future growth which may or may not materialize. However, in an IaaS world based upon a consumption cost model, this may be wasteful as organizations may be paying for unused capacity. This panel discussion will focus on tools and processes which can be used to optimize your IaaS footprint so that you only pay for what you need.

CAS

12:15 pm – 1:15 pm ET (60 CPE)

Why You Shouldn't Run Your CAS Practice Like An Audit Or Tax Practice

Facilitator:

Matthew West – CPA.com / AICPA, Dexter, MI

Panelists:

Chris Gallo – BerganKDV, Urbandale, IA

Pitney, Michael – RSM US LLP, Raleigh, NC

Christine Triantos – BDO USA, LLP, Denver, CO

Enabled and accelerated by technologies such as automation, artificial intelligence, and cloud computing, firms are providing some form of client advisory services (CAS) today. As reported in Accounting Today's March 2021 Top 100 Firms report, "Niche Services helped fuel growth for the 2021 Top 100 firms during an uncertain year. CAS was the niche service with the most dramatic increase in T100 Firms reporting growth over last year, adding revenue for 75 percent of this year's T100, a 12-percentage-point expansion over last year that propelled it six spots up the 2021 rankings." Yet, there are still many firms considering this opportunity or struggling with aligning their CAS business model and technology strategy.

Join us for a discussion with your peers to discuss actionable insights to consider and incorporate in your CAS technology strategy and growth goals for the future.

CR

1:30 pm – 2:30 pm ET (60 CPE)

The Journey To Adopting The Subscription Business Model: Avoiding the Potholes - Roundtables

Moderators:

Nick Brorson – Sockeye, Anchorage, AK

Annette Manias – Oasis Systems Group, Louisville, KY

Tony Merry – ETHOSystems, Scottsdale, AZ

Dom Pernai – ETHOSystems, Chicago, IL

Stacy Schuettler – LBMC Technology Solutions, Brentwood, TN

Brian Terrell – BTerrell Group, LLP, Addison, TX

This is a moderator lead continuation of the topics discussed in Session 1. Participants will be joining breakout rooms to discuss the following topics in greater detail.

- Services as a Subscription
Impacts of moving to a Services as a Subscription model?
- Subscription Sales Compensation
One-Time Commission or On-Going with CSM role?
- Revenue Models
Customers mindset shifting from hourly consulting to subscription services?
- Customer Success Manager
What is the value realized with adopting this role?

ITL-S

1:30 pm – 2:30 pm ET (60 CPE)

Psychology Of Technology

Cindy Balsam – Marks Paneth LLP, New York, NY

Debbie Davidman – Marks Paneth LLP, New York, NY

Explore and understand the user perspective and their relationship with technology. Learn what causes varying levels of engagement and usage, underlying reason for possible frustration, how to develop users who can persevere, how to manage users with high levels of fear for technology and instill increased confidence. Understand the root cause of the emotion in relation to their response to the technology, whether it is anger, fear, boredom and how to manage those emotions with the user community to optimize on technology usage.

ITL-T

1:30 pm – 2:30 pm ET (60 CPE)

Privacy And Artificial Intelligence

Facilitator:

David Emmer - Anchin, Block & Anchin LLP, New York, NY

Panelists:

Daniel Martin – Morrison Mahoney LLP, New York, NY

Todd Robinson – Vic.ai, New York, NY

Russell Safirstein – President Redpoint Cybersecurity LLC and Partner-in-Charge, Anchin Digital Risk Solutions, New York, NY

As Artificial Intelligence proliferates within our firms and at our customers, it introduces new challenges and risk profiles. Join our panel as they discuss their privacy concerns and share their steps to reduce their risks and liabilities when using third-party AI vendors. Hear perspectives from practice members and software publishers alike.

CAS

1:30 pm – 2:30 pm ET (60 CPE)

Specialization In CaaS

Facilitator:

Jenni Huotari – Eide Bailly LLP, Fargo, ND

Panelists:

Sharon Berman – Rehmann, Troy, MI

Kimberly Blascoe – Wipfli LLP, Rockford, IL

Kane Polakoff – UHY Advisors, MI, Inc., Farmington Hills, MI

The push for specialization in the CaaS space. Industry specialization or technical specialization? Standard vs. Custom. Spaghetti vs. Waffles. When bringing on a new specialty, what is involved? Are the stories true, and there really is gold at the end of the rainbow. If so, what types of dragons are guarding the way?

CR

3:00 pm – 4:00 pm ET (60 CPE)

Driving Opportunity In The “New Normal”: The Strategy, Tactics, And Execution Of Generating Leads Across Every Role in the Firm – Session 1

Moderators:

Bill Hammer – Compleat Software, Atlanta, GA

Juston Michealson – CS3 Technology, Tulsa, OK

Panelists:

Libby Beemer – Aktion Associations, Inc., Maumee, OH

Laura Atkins - RKL eSolutions LLC, Lancaster, PA

The market across the world changed rapidly in 2020 and accelerated several trends our market was experiencing already. In this 2-session series, an expert Panel will lead a discussion followed by Break Out Room sessions to address the changes to the market brought on by 2020, industry shifts, and the impact of the educated buyer. In the first Session, we will discuss aligning your company go-to-market strategy to the new normal with panel experts on effective marketing across an organization. We will explore the marketing shift to generate SQL's vs MQLs and how your entire organization can align to generate more leads. After the Panelist discussion, attendees will break out into 3 separate groups to discuss the session topics.

Session 1 Topics Discussed by Panel and Break Out Groups:

1. Aligning Marketing to the Corporate Strategy
2. The Impact of COVID to Market Behavior
3. Change in Selection Process and Buyer Behavior

ITL-S

CIO's And Their Designees ONLY

3:00 pm – 4:00 pm ET (60 CPE)

Career Paths and Compensation Models in CPA – IT

Facilitator:

Cindy Balsam – Marks Paneth LLP, New York, NY

Debbie Davidman – Marks Paneth LLP, New York, NY

Join our ITL Planning Committee Chair, Debbie Davidman, as she leads our ITL CIO's in a discussion ... This session will be an excellent wrap-up to the week's presentations and discussions. Reminder - participation in Strategic roundtables are limited to ITL CIO and their designated firm representatives only. Thank you for your cooperation.

ITL-T

3:00 pm – 4:00 pm ET (60 CPE)

Managing Client Data Internally. Data Retention. Data Classification

Facilitator:

Greg Gunderman – CohnReznick, Roseland, NJ

Panelists:

Shawn M. Gerlach – CLA, Greenwood Village, CO

JD Stotts – Whitley Penn, Forth Worth, TX

Kenny Li - Citrin Cooperman, New York, NY

Greg Shoemaker - BKD, LLP, Knoll Trail, TX

Data is a never-ending battle that can leave a firm overwhelmed with its volume, unprepared to use it, at risk for keeping it, and potential litigations because of it. Through panel discussion, we will learn how peer firms are storing data, managing data retention, maintaining privacy and compliance, preventing data loss, learning from their experiences and some of the tools they are using to assist in this effort.

CAS

3:00 pm – 4:00 pm ET (60 CPE)

Three Different Levels Of A CAS Practice - Understanding Where You Are And Deciding Where You Want To Be

Facilitator:

Deneen Dias – Botkeeper, Boston, MA

Panelists:

Dixie McCurley - Trusted CFO Solutions, Atlanta, GA

Kimberly Blascoe – Wipfli LLP, Rockford, IL

Our CAS practices are no different than our clients, we need to understand where we are today to determine where we want to be in the future. Let's be honest – are we really offering CFO services? If you take a step back and look at the different services you offer in your CAS practice – would they fall at controller level, CFO level or beyond? What do you define as controller vs CFO services? Is there a beyond? Understanding the different levels of a CAS practice is important when planning your future journey. Join us for an interactive discussion on where we are at today, what the different levels are, and how standardization and industry knowledge can help you get there – wherever “there” is for your firm.

CR

4:15 pm – 5:15 pm ET (60 CPE)

Driving Opportunity In The “New Normal”: Marketing Tools and Tactics – Session 2

Moderators:

Bill Hammer – Compleat Software, Atlanta, GA

Juston Michealson – CS3 Technology, Tulsa, OK

Panelists:

Libby Beemer – Aktion Associations, Inc., Maumee, OH

Laura Atkins - RKL eSolutions LLC, Lancaster, PA

In the 2nd session of the series, we will explore the specific tactics and tools we can and should leverage to best address the new market, buyer, and changes to our own organizations. Our expert Panelists will discuss the tactics across your organization to contribute to lead generation, some of the best tools to leverage, and what training is needed to be the most effective. After the Panelist discussion, attendees will break out into 3 separate groups to discuss the session topics.

Session 2 Topics discussed by Panel and Break Out Groups:

1. Role of Individuals Within Departments to Supplement Marketing and Contribute to Lead Gen
2. Best Tools to Leverage
3. What Training is Needed to Maximize Effectiveness

ITL-S

4:15 pm – 5:15 pm ET (60 CPE)

Are You Ready For The Rise Of "Citizen Development"?

Facilitator:

Patrick Powers – Crowe LLP, South Bend, IN

Panelists:

John Bowles – DHG, Hendersonville, NC

Bob Bushey – CohnReznick, Chicago, IL

Michael Connell – CLA, Middleton, WI

Allen Smith – Baker Tilly, Madison, WI

No-Code and Low-Code application development platforms hold the promise for personnel to create their own application solutions rather than waiting for it to eventually be addressed by IT already which may already be dealing with a long request backlog. However, there are risks and potentially unanticipated adverse consequences related to citizen development which should be considered before making these tools available to your firm. Through a panel discussion we will explore approaches and governance which balances risk mitigation with empowering the citizen developer.

ITL-T

4:15 pm – 5:15 pm ET (60 CPE)

Breakouts / Roundtables

Technology Training

Effective And Creative Approaches To Technology Training. Techniques And Tips.

Facilitators:

Cindy Balsam – Marks Paneth LLP, New York, NY

Debbie Davidman – Marks Paneth LLP, New York, NY

Successful training delivery is both an art and science. Explore varying training and educational techniques. Discuss the criticality of successful training programs in short and long term of any tool, and how to best support the training needs. Discuss importance of messaging and learn how to best address shorter attention spans in our soundbite environment. Learn the concepts of differentiated education programs and how to apply it within technology training. How to ensure the training sessions are fun and inclusive.

Practice Management Roundtable

Project Team Engagement & Meetings

Facilitators:

Jeff Case - BKD,LLP, Springfield, MO

Tiffany Russell – BKD, LL, Springfield, MO

Join this roundtable discussion on project team engagement & meetings:

- Have you successfully implemented any ideas from Steven G. Rogelberg's The Surprising Science of Meetings or made other meeting management improvements?
- What are your key goals for maturing or evolving your PMO/project management team this year?
- How is product management affecting your PMO?

Application-Development Roundtable

Application Modernization For The Next Decade

Facilitator:

Ravi Ginjupalli – Plante Moran, Southfield, MI

Join this roundtable discussion on application development to discuss the following topics:

- Citizen Development
- API/Microservices
- Intelligent Automation
- Threats (Data Privacy/Security)

Infrastructure Roundtable

Facilitator:

Scott Newcomer, Crowe LLP, South Bend, IN

A year into the pandemic with 100% work from home and opportunities to enhance your firm's go-to market strategy. How has your life changed? What did you have to do in March 2020 to support your firm to 100% off-site? Discussions on these topics:

- Meeting/Collaboration Tools (Teams, Zoom)
- Workstations
- Management and Equipment
- Offices
- Cloud
- Staffing

Security Roundtable:

Security Protection Of The Remote Workforce

Facilitator:

Roy Persaud, Marks Paneth LP, New York, NY

The Covid-19 pandemic has forced most, if not all of our workforce to work remotely from home. Prior to working remotely, most of us were protected within our corporate office by being behind the corporate firewall with security deployed. What additional measures are you taking if any to extend that security protection to your remote work force. Handling a much bigger remote workforce became a challenge in this situation.

- What additional security application were deployed to protect remote workers
- Was that already in place
- Did you have to extend the corporate firewall security policies to the remote workforce
- What were the challenges
- How did the employees react
- Were any policies discussed re: security on employees W-Fi
- Were policies discussed on security for employees using non company endpoints for remote access.
- Security and MFA on VPN connectivity.
- Are you using split tunnelling
- EDR and visibility (endpoint detection and response)
- Deploying replacement endpoints to staff at short notice

CAS

4:15 pm – 5:15 pm ET (60 CPE)

Structuring Your CaaS Leadership Team

Moderator:

Jenni Huotari – Eide Bailly LLP, Fargo, ND

How do you structure your leadership team in your CAS practice? Are the leaders client-facing, or are they driving the overall practice and management? Are your team members dedicated to the CAS practice, or are they a shared resource? Hard to serve two masters. Do you find team leaders holding on to their old clients and services as a way to hedge their bets?

FITNESS
INCREASES IN VALUE
WHEN SHARED



OPTIONAL EVENT

ITA FITNESS CHALLENGE

No Cost for the Event or for the Participant T-Shirt

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APRIL 26-28, 2021



ita
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NASBA Registry Information

Credit Hours: Up to 18 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 Large CPA Firm Client Accounting and Advisory Services. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member clients or their businesses to be more successful.

Field of Study:

Business Management and Organization

Level – Update

Prerequisites – Minimum 3 Years as an IT Consultant or Technician

Advance Preparation – None

Instructional Delivery Method – Lecture & Discussion

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

NASBA Registry of CPE Sponsors

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

Administration

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