FALL 2021

December 5-7, 2021
Westin Savannah Harbor Golf Resort & Spa
Savannah, Georgia

ITA Mobile
Your Meeting Guide
https://eventmobi.com/itafall2021

#ITAFall21

Sunday, December 5

Time	Event
7:00ᴬᴹ - 1:30ᴾᴹ	Optional Social Events
2:30ᴾᴹ - 7:30ᴾᴹ	Badge Pickup Grand Ballroom Foyer
3:30ᴾᴹ - 4:30ᴾᴹ	Meet, Greet & Eat Session Harbor B
4:30ᴾᴹ - 5:45ᴾᴹ	ITA OPENING GENERAL SESSION Grand A/B President's Welcome - Shawn Slavin, ITA President KEYNOTE: A Culture Of Raving Fans (Or You Can Call It "Stop Standing Still, Start Standing Out") - Jesse Cole
5:45ᴾᴹ - 6:00ᴾᴹ	Celebration of Taylor Macdonald - Emeritus Board Member's Retirement Grand C
6:00ᴾᴹ - 9:00ᴾᴹ	Welcome Reception and Retirement Celebration for Taylor Macdonald (Emeritus Board Member) Grand C Sponsored by sage
7:30ᴾᴹ	Dinner On Your Own and Various Partner Events

Monday, December 6

Time	Event
7:00ᴬᴹ - 8:00ᴬᴹ	Breakfast Grand C
7:00ᴬᴹ - 5:00ᴾᴹ	Badge Pickup Grand Ballroom Foyer
8:00ᴬᴹ - 10:00ᴬᴹ	MONDAY OPENING SESSION Grand A/B President's State of the Association - Shawn Slavin, ITA President KEYNOTE: Leading From Anywhere: How To Build High Performing Remote And Hybrid Teams - David Burkus

TRACKS AND SESSIONS	Consulting & Reselling (CR)		Internal Tech Leaders (ITL)	
	CR Track 1 Grand A	CR Track 2 Grand B	ITL Strategic Harbor	ITL Tactical Grand DE
10:30ᴬᴹ - 12:00ᴾᴹ	Services Versus Solutions - A Digital Transformation Story (This session in Harbor)	Joint CR and ITL Session Grand A/B Hybrid Model: Finding The Right Balance For Your Employees		When The Chips Are Down: Navigating Supply Chain Shortages
12:00ᴾᴹ - 1:15ᴾᴹ	Lunch Grand C			
1:15ᴾᴹ - 2:45ᴾᴹ	Finding A Great Client Account Manager: Is It Like Hunting Unicorns?	Before It Strikes – Assessing Ransomware Vulnerabilities For Your Team	Collaboration Platforms: What Glue Keeps Your People Together?	Demand Management: How To Balance The Routine With Innovation
3:00ᴾᴹ - 4:15ᴾᴹ	Effective And Collaborative Partnerships In The Modern Age	Why Should Our Clients Get all the Automation?	SOC 2 Compliance: How Trustworthy Are You?	ITL Tactical Roundtables
4:30ᴾᴹ - 5:30ᴾᴹ	ITA IGNITE - Mark Severance Grand A/B			
6:30ᴾᴹ - 9:00ᴾᴹ	RECEPTION AND DINNER PARTY Harbor Lawn or Grand C			

Tuesday, December 7

Time	Event
7:00ᴬᴹ - 8:00ᴬᴹ	Breakfast Grand C

TRACKS AND SESSIONS	Consulting & Reselling (CR)		Internal Tech Leaders (ITL)	
	CR Track 1 Grand A	CR Track 2 Grand B	ITL Strategic Harbor	ITL Tactical Grand DE
8:00ᴬᴹ - 9:15ᴬᴹ	Balancing Efficiency And Effectiveness in Customer Communication (This session in Grand DE)	Joint CR and ITL Sessions Grand A/B Getting Ahead Of The Great Resignation		
9:30ᴬᴹ - 10:45ᴬᴹ	Working With Cannabis Customers: "Growing Legal"	The Why And How To Convert Traditional Professional Services Revenue Into Recurring Revenue	If Necessity Is The Mother Of Invention, Then Who Is The Mother Of Innovation?	Midnight In The Garden Of Good And API's
11:00ᴬᴹ - 12:15ᴾᴹ	Measuring Marketing Success: Pro Tip "Measure What Matters"	Transformation As A Service: Start ASAP – Like Right Now!	Update On Business Technologists (Citizen Developers And Analysts) And Data Analytics: How Have Your Firms Evolved Over The Past 24 Months?	
12:15ᴾᴹ - 1:30ᴾᴹ	Lunch Grand C			
1:30ᴾᴹ - 3:00ᴾᴹ	Roundtables - Let's Continue the Conversation		The Office Of 2023 – How The Pandemic And Return To Hybrid Work Will Forever Shape The Workplace Of The Future	ITL Tactical Roundtables
3:00ᴾᴹ - 3:15ᴾᴹ	CR Wrap Up Session and Conference Adjournment		ITL Wrap Up Sessions & Conference Adjournment	

Wednesday, December 8

Time	Event
8:30ᴬᴹ - 3:00ᴾᴹ	ITA Leadership Alliance (ILA) Base Camp - Class of 2021-22 Grand F Note: Session is NOT part of the ITA Collaborative. This is the ILA Group.

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Session Descriptions and Speakers

Consulting & Reselling - CR
Internal Technology Leader Tactical - ITL-T
Internal Technology Leader Strategic - ITL-S

Sunday, December 5 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)

4:30 – 4:45 pm
President's Welcome
Room: Grand AB

> *Shawn Slavin – ITA President, Owasso, OK*

ITA President Shawn Slavin will introduce our Fall Collaborative Committees and welcome our new members and guests. He will also provide an overview of the Fall Collaborative agenda prior to introducing our Sunday night keynote speaker.

4:50 – 6:00 pm (75 CPE)
KEYNOTE: A Culture Of Raving Fans (Or You Can Call It "Stop Standing Still, Start Standing Out")
Room: Grand A/B

> *Jesse Cole - Founder of Fans First Entertainment and owner of the Savannah Bananas*

- What sets you apart. Make experiences so memorable that customers say "You wouldn't believe…!!"
- Learn how to create Raving Fans who are loyal instead of customers who are transactional.
- Make Raving Fans & Customer for Life. Learn to map the perfect customer journey with your company.
- Discover how to never lose a customer again with a step-by-step plan to wow customers after the transaction.
- Learn to adapt! When the going gets tough, successful companies get creative!
- How to be wildly creative on a tight budget. Brilliant ideas don't have to be expensive.

Monday, December 6 – 8:00 – 10:15 am - Monday Morning General Session & Keynote (75 CPE Minutes)

8:00 – 8:30 am
President's State Of The Association Discussion
Room: Grand AB

> *Shawn Slavin – ITA President, Owasso, OK*

ITA President Shawn Slavin will update the membership on the "what's happening" in ITA. We'll discuss the current ITA Board of Directors Strategic Initiatives and other activities that the ITA Board and Staff are focusing on to continue to add value to your ITA membership.

8:30 – 9:45 am (75 CPE Minutes)

KEYNOTE: Leading From Anywhere: How To Build High Performing Remote And Hybrid Teams

Room: Grand AB

David Burkus – International Keynote Speaker & Author - Helping Teams Do Their Best Work Ever

It's undeniable that we're entering a new era of remote work. While many leaders seek to run business as usual, why settle for the usual when remote teams allow us to work even better? The research shows that employees are more productive and engaged when they have the freedom to work from anywhere.

Which means leaders need the skills to lead from anywhere.

In this meticulously researched, refreshingly practical talk, top business thought leader David Burkus provides managers with a complete guide to leading remotely, packed with everyday examples and illuminating insights. Burkus tackles the key inflection points and challenges that remote managers face from taking the team remote and adding new members, to communicating effectively and quickly, managing performance, keeping the team engaged, and even helping them strike the right balance between work and life. This talk provides everything you'll need to survive and thrive as the leader of a remote team—which is something all leaders will need to consider themselves from now on.

Concurrent Sessions – By Date and Time

Monday, December 6 - 10:30 am 12:00 pm – (90 CPE Minutes)

CR-1

Services Versus Solutions - A Digital Transformation Story

Room: Harbor

Robert Johnson – CLA, Jacksonville Beach, FL

How can you help your clients leverage their data, create actionable insights, and enhance performance. Taking your client to the next level. How to turn business intelligence into action. Our connected world produces countless data sources. Uncovering the hidden potential in data and taking steps to improve management and operations, reduce risk and apply strategic, forward-looking action.

CR-2 and ITL-S

Hybrid Model: Finding The Right Balance For Your Employees

Room: Grand AB

David Burkus – International Keynote Speaker & Author
Mike Denno – Rehmann, Saginaw, MI
Lynne Henslee - e2b teknologies, Inc., Cleveland, OH
Marc Palombo – Onit, Sterling, VA
Allen Smith – Baker Tilly, Madison, WI

Deciding whether to maintain an office environment, have your employees continue to work from home, or adopt a hybrid model of days in the office and days at home is the big question of business owners as we emerge from the pandemic into the light of a new model. Listen to our panel of experts as they discuss the pro's and con's of each model.

ITL-T

When The Chips Are Down: Navigating Supply Chain Shortages

Room: Grand DE

Facilitator:
Greg Shoemaker – BKD, LLP, Knoll Trail, TX

Panelists:
Jeff Cooper – RubinBrown LLP, St. Louis, MO
Renee Coursey – BKD, LLP, Springfield, MO
Patrick Justice – Elliott Davis LLC, Greenville, SC

The COVID-19 pandemic has affected business in many ways. Hardware supply chain shortages are one major disruption that firms will continue to deal with for the foreseeable future. Planning, visibility, and flexibility are paramount to navigating these challenges so that business is not interrupted. In this session, we will:

•   Share lessons about supply chains learned in the past 18+ months
•   Compare how processes were changed and the strategies used to navigate those challenges
•   Discuss how vendor relationships helped or hindered during this time
•   Examine knowledge of future shortages and planning for those shortages

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Monday, December 6 – 1:15 – 2:45 pm – (90 CPE Minutes)

CR-1

Finding A Great Client Account Manager: Is It Like Hunting Unicorns?

Room: Grand A

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

Panelists:
Scott Irwin - Aktion Associates, Inc., Maumee, OH
Kelly A. Hummel – Net at Work, NY, NY
Kavi Nath – Acumatica, Atlanta, GA
Stacy Schuettler - LBMC Technology Solutions, Knoxville, TN

The account manager plays a pivotal role in the consulting/VAR world. But over the course of time, the role has evolved with the rise of Software-as-a-Service (SaaS). With this evolution, the role of an account manager has not been the same.

Account management is more diverse and people in those roles require certain traits to succeed. In the SaaS world, account managers are now more into customizing the customer workflows rather than just the finance part. They have become a people's person and are hyper-focused on customer retention.

In this session we'll address what Account Management looks like in the SaaS era and the traits a high-performing Account Manager must have to retain customers. We'll cover the top qualities of a successful Account Manager and what businesses can do to find and develop this highly-sought after talent.

CR-2

Before It Strikes – Assessing Ransomware Vulnerabilities For Your Team

Room: Grand B

Gary Feldman – Summit Hosting, LLC, Marietta, GA
Todd Perlman - Business Technology Partners, LLP, Deerfield, IL

What steps are you taking to make sure that your company is protected from your clients' vulnerabilities. Are your employees aware of what they should/should not do?   Do you have the proper protections in your agreements? How should you respond if your client is attacked?

ITL-S

Collaboration Platforms: What Glue Keeps Your People Together?

Facilitator:

Jeff French – Elliott Davis, LLC., Greenville, SC

Panelists:

Mike Denno – Rehmann, Saginaw, MI

Sean Grieco – The Bonadio Group, Amherst, NY

Dan Mallory – Aprio, Atlanta, GA

Room: Harbor

We all know that strong collaboration platforms were one of the keys to successfully navigating the pandemic. While everyone was 100% remote, all employees were on a level playing field and the meeting/collaboration experience was essentially the same for all participants. Now that some firms have returned to hybrid work and conference rooms are being utilized once more, the meeting experience can vary greatly from person to person. In an effort to be more inclusive to all employees, no matter where they are located, firms are tackling this challenge in new and unique ways. This panel will encourage active audience participation to answer the following questions:

- What Collaboration platforms are in use and what are their pros and cons?
- How are these platforms being used to support both in office, inter-office and remote collaboration?
- What are some unique approaches firms have taken to be inclusive of both remote and conference room participants?
- What investments have been made to improve the experience?
- What are some predictions for the future of these platforms?

ITL-T

Demand Management: How To Balance The Routine With Innovation

Room: Grand DE

Facilitator:

Dan Metzger – Eide Bailly LLP, Fargo, ND

Panelists:

Mark J. Hopewell – Myers and Stauffer, A CBIZ Company, Indianapolis, IN

Patrick Powers – Crowe LLP, South Bend, IN

Demand Management: How To Balance The Routine With Innovation

Managing IT demand in today's environment is increasingly complex. The emerging role of Business Technologists, highly complex IT ecosystems and a never ending need to drive innovation have forced IT departments to rethink their approach to Demand Management. Join us for a panel-led discussion on how ITA firms are attempting to solve those problems in the real world.

Monday, December 6 – 3:00 – 4:15 pm – (75 CPE Minutes)

CR-1

Effective And Collaborative Partnerships In The Modern Age

Room: Grand A

Facilitator:

Bill Gaustad – SPS Commerce, Inc., Minneapolis, IN

Panelists:

Carla Santucci Brown – SWK Technologies, Inc., San Diego, CA

Steve Showalter – Scanforce, Miami, FL

Diana Lane – Sage, Lawrenceville, Austin, TX

We all share a common goal – supporting customers with effective solutions that have lasting value and support. Our seasoned panel of experts representing a reseller, ISV, and publisher share their knowledge on how our mutual goals align. Gain insights and leverage these relationships to increase your firm's depth and breadth while establishing lifelong customers.

CR-2
Why Should Our Clients Get All The Automation?
Robert Gaby – RKL eSolutions LLC, Simi Valley, CA

Room: Grand B

Get the cobbler's kids some shoes, for goodness sake! For all the great work we do for our clients, let's be strategic in using some of that brilliance for internal process automation. In the last several years, Bob Gaby at RKL has configured SmartSheet to manage a host of internal and client-facing items that previously relied upon spreadsheets, sticky notes, email, Elmer's glue, and carrier pigeons. Attend this session to learn how a tool like SmartSheet can help you to:

• Manage and streamline internal projects
• Collaborate more effectively with your clients
• Provide dynamic dashboards for projects, teams, and employees
• Rapidly deploy templates for Marketing, HR, Product Development and Project Management
• Integrate with Salesforce, Slack, Microsoft Teams, ServiceNow, Outlook, PowerBI, and your ERP solution, and
• Track the flight paths of carrier pigeons (kidding)

ITL-S
SOC 2 Compliance: How Trustworthy Are You?
Room: Harbor

Facilitator:
Jeff Cooper – RubinBrown LLP, St. Louis, MO
Panelists:
Greg Shoemaker – BKD, LLP, Knoll Trail, TX
Allen Smith – Baker Tilly, Madison, WI

Many firms receive client questionnaires asking about how good their security is and, specifically, if they are SOC 2 compliant. Here's an opportunity to hear from firms that have become SOC 2 compliant, or may be in the throes of it now, and what their experience was and how they can help others.

ITL-T
ITL Tactical Roundtables
Room: Grand DE

The ever-popular ITL Tactical Roundtables for this Fall 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:** *Spencer Powell – Warren Averett, Birmingham, AL*
• **Infrastructure/Engineering:** *TBD onsite*
• **Service Delivery and Metrics and Support:** *TBD Onsite*
• **Project Management:** *Kathy Rogers – DHG, Henderson, NC*
• **Security/Compliance:** *TBD Onsite*

Monday, December 6 – 4:30 – 5:30 pm – No CPE

All

ITL Ignite!

Room: Grand AB

> *Mark Severance – RKL eSolutions LLC – Simi Valley, CA*

"Ignite" is back on the agenda! Ignite talks are creative, enlightening, and a perfect opportunity to live the ITA motto – Knowledge Increases in Value When It Is Shared. The concept of Ignite is where you'll see a few of our ITA members come up on stage and give 5 minute presentations about something personal or professional that they are passionate about. The concept of Ignite is to "Enlighten us, but make it quick!" In the last ITA Ignite session we learned binder clip hacks, the joys and perils of taking risks, cycling's rules of the road, supporting and hiring US vets, men with brooms and a variety of other useful (and useless) topics. The whole idea behind Ignite is to learn something new about your ITA members in a fun and informal way. And, by the way, beer and wine will be served!

Tuesday, December 7 – 8:00 – 9:15 am - (75 CPE Minutes)

CR-1

Balancing Efficiency And Effectiveness In Customer Communication

Room: Grand DE

> **Facilitator:**
> *Whitney Gilstrap - Lockstep Network, Inc., Chardon, OH*
> **Panelists:**
> *Esther Angell – Cargas Systems, Inc. – Lancaster, PA*
> *Annette Manias – Oasis Solutions Group, Louisville, KY*

In today's fast-paced environment, organizations must strive for advanced levels of efficiency. Everyone wants to be efficient, but that is not always the best approach when communicating with customers, especially if a timely response from your customer is required.

While efficiencies hold the key to financial success, organizations must strike the right balance between "efficiency" and "effectiveness." Spending additional time upfront to find the right balance of efficiency and effectiveness when communicating with customers will provide long-term benefits for you and your customers. Not all communication methods work in the same way for customers and it's vital to understand the best methods your customers prefer. Your approach for strategic high-value clients will differ from standard clients and identifying red-flags in the communication workflow should be considered for these strategic clients. This session will review benchmark data related to customer communication and the balance between personal touch and automation. Be ready to bring examples (the good and the bad) of ways your company communicates with customers and walk away with tactical initiatives to implement in your workplace.

Joint Session
CR and ITL
Getting Ahead Of The Great Resignation
Room: Grand AB

> **Facilitator:**
> *Jeff French – Elliott Davis, LLC., Greenville, SC*
> *Bill Petersen – Deltek, Herndon, VA*
> **Panelists:**
> *Loren Eckart - Digilence, LLC, Atlanta, GA*
> *Joe Noll - RKL eSolutions LLC, Lancaster, PA*
> *Michael Pynch – Wipfli LLP, Eau Claire, WI*
> *Aaron Rosenberg – Oasis Solutions Group, Louisville, KY*
> *Heidi K. Simmons – Baker Tilly, Minneapolis*

Surely you're aware that roughly 50% of your employed team members are actively job hunting. But do you know why?
Do you think it's just about logistics and flexibility of their work arrangements? There's much more to it than that. Some of the topics that will be covered by our group of panelists will include:
• Is it already too late to try and stop it?
• Why it's happening (burnout, lack of purpose or emotional support, etc)
• What firms are doing to try and prevent it (bonuses, benefits, flex schedules, etc)
• How firms are dealing with reduced headcount (augmenting with technology or outsourced labor)
• Is this just a bubble? And if so when will the bubble burst?

Despite what the constant barrage of internet news would have you believe, there is still hope! Join us for this panel session to find out how some of our fellow colleagues are being impacted and what they are doing to combat this.

Tuesday, December 7 – 9:30 – 10:45 am - (75 CPE Minutes)

CR-1

Working With Cannabis Customers: "Growing Legal"
Room: Grand A

> **Facilitator:**
> *Josh Gilstrap - e2b teknologies, Inc., Cleveland, OH*
> **Panelists:**
> *Mary Jo Mahood - e2b teknologies, Inc., Cleveland, OH*
> *Jennifer Tschetter - Jennifer A. Teschetter, PA, Tallahasse, FL*
> *Ori Sivan – Parliament Consulting, Miami, FL*

Prepare yourself for the coming federalization of cannabis by hearing from a leading panel of experts in the industry. Learn banking, tax, ERP, and compliance challenges and how they will impact your approach to growing with the budding industry.

CR-2

The Why And How To Convert Traditional Professional Services Revenue Into Recurring Revenue
Room: Grand B

> *Marcus Wagner – Baker Tilly, Houston, TX*
> *Ken West – Baker Tilly, Houston TX*

This session is all about how to convert traditional professional services/consulting revenue into multiyear recurring revenue contracts. Let's face it, most firms want to increase their recurring revenue as a percentage overall revenue in order to grow enterprise value. We will discuss how we are going to market with the offering, customer reactions, what to consider as far as various pricing models, and how to determine success (or failure). This is no longer just future thinking…it's happening now. It is complex and requires a paradigm shift. Take the first steps now.   Please note, a workshop session is also scheduled as follow-up to this session.

ITL – S
If Necessity Is The Mother Of Invention, Then Who Is The Mother Of Innovation?
Room: Harbor

Russ Ahlers – BDO USA, LLP, Grand Rapids, MI
Allen Smith – Baker Tilly, Madison, WI

The common mythology with invention is that of the lone genius laboring with an almost maniacal passion to succeed in the face of all odds (Edison, Ford, etc.). Does this model hold for innovation or does it require a different approach? In this session we will discuss:

•	The goals and context of each firm's innovation program or initiative
•	The design of the overall program, allocation of resources; development of innovation capabilities, behaviors and culture; communication about innovation; and continuous improvement of the innovation program
•	The role of internal IT in the innovation process

ITL – T
Midnight In The Garden Of Good And API's
Room: Grand DE

Facilitator:
Chris Morrow – Warren Averett, Birmingham, AL
Panelists:
Adam Orentlicher – Wolters Kluwer, Apex, NC
Spencer Powell – Warren Averett, Birmingham, AL
Cathy Rowe – Wolters Kluwer, Riverwoods, IL

As more and more firms are looking for greater efficiencies by having their applications communicate with one another, APIs are more important than ever with these interfaces acting as the glue that bridges the applications together. Many firms are using the APIs in the CCH Axcess Open Integration Platform (OIP) to automate their accounting workflows.   These projects include client onboarding and provisioning as well as audit and tax delivery.   Whether you are looking to begin your journey with CCH APIs or you are a seasoned pro, this session will provide something for everyone. In this session we will:

•	Recap best practices that have been identified across our firms
•	Hear from a CCH representative and have a chance to offer feedback and request enhancements
•	Talk about ways that our development teams can collaborate by sharing code and/or best practices and ideas on an ongoing basis

CR-1
Measuring Marketing Success: Pro Tip "Measure What Matters"
Room: Grand A

Facilitator:

Whitney Gilstrap - Lockstep Network, Inc., Chardon, OH

Speaker:

Melissa Hendrick - Lockstep Network, Inc., Seattle, WA

Ever ask yourself why are we tracking this, or how is this data being used? This session will discuss what core and campaign metrics should be measured in conjunction with sales metrics to track performance week-over-week, month-over-month, etc. against the most impactful converting channels that ignite demand. These metrics will be used to drive budget, future marketing/sales decisions, and define your ICP (ideal customer profile). Below are some topics you can expect to learn about in this interactive session:

- Campaign performance, channel performance, conversion rate, cost, etc.
- The Data: Where to start and defining what data matters.
- Attribution: What fields are needed to be able to capture the data? Can this be done in your current tech stack? What departmental support is needed?
- Analyzing the results: Just capturing the data is the first step. What do you do with the data?

CR-2
Transformation As A Service: Start ASAP – Like Right Now!
Room: Grand B

Marcus Wagner – Baker Tilly, Houston, TX

Ken West – Baker Tilly, Houston TX

This session is the sequel to "Transformation as a Service" and is designed as a working session to ask questions of the team at AcctTwo / BakerTilly, gather additional details on lessons learned, and begin to develop an action plan to tackle the exciting, yet complex opportunity to offer professional services as a subscription. You'll benefit if you attend by yourself, but even more so if you invite your colleagues to collaborate with you. There's no time like the present to get a head start on creating the professional services firm of the future.

ITL – ALL
Update On Business Technologists (Citizen Developers And Analysts): How Have Your Firms Evolved Over The Past Six Months?
Room: Grand DE

Facilitator:

Kevin Fraase - Eide Bailly LLP, Fargo, ND

Panelists:

Michael Connell – CLA, Middleton, WI

John Curtis – Weaver, San Antonio, TX

David Hirschkorn – Eide Bailly LLP, Fargo, ND

Kevin Sexton – Cohen & Company, Cleveland, OH

The number of citizen developers and analysts, or more recently referred to as business technologists, has continued to increase; along with their requests for analytical and development tools. How have your firms adapted to handle these requests? In this session we will discuss:

- How have your business technologist programs have evolved in the past six months?
- Are your programs becoming more formal? And if so, how?
- Have you established standard tookits for your business technologists? And if so, would you be willing to share those tools?
- Do you require your business technologists to obtain a certain level of training and proficiency before granting them these tools?

Tuesday, December 7 – 1:30 – 3:00 pm - (90 CPE Minutes)

CR-ALL

Roundtables - Let's Continue The Conversation

Room: Grand A

Robert Gaby – RKL eSolutions LLC, Simi Valley, CA

ITL-S

The Office Of 2023 – How The Pandemic And Return To Hybrid Work Will Forever Shape The Workplace Of The Future

Room: Harbor

Jeff French – Elliott Davis, LLC., Greenville, SC

The pandemic hit us by surprise. Everyone reacted, priorities changed and an unprecedented global pivot took place in terms of how we utilize office space. As we have worked through those challenges, there are some positive changes that came about.   Some of the questions that will be discussed are:

- How do you see the office being utilized in 2022 and 2023?
- Do you think office utilization will increase or decrease over the next 2 years?
- What were some of the positive outcomes of the pandemic/remote work that you hope to hold on to as it relates to the office experience?
- What do you miss most from pre-pandemic era?
- What was more efficient then vs now and vice versa?

ITL-T

ITL Tactical Roundtables

Room: Grand DE

The ever-popular ITL Tactical Roundtables for this Fall 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:** *Spencer Powell – Warren Averett, Birmingham, AL*
- **Infrastructure/Engineering:** *TBD Onsite*
- **Service Delivery and Metrics and Support:** *TBD Onsite*
- **Project Management:** *Kathy Rogers – DHG, Henderson, NC*
- **Security/Compliance***: TBD Onsite*

Tuesday, December 7 – 3:00 – 3:15 pm

Wrap Up Sessions & Adjournment Of The ITA Fall Collaborative

CR

Room: Grand A

Facilitator: Shawn P. Slavin - ITA President, Owasso, OK

ITL

Room: Grand DE

Facilitator: Lissa Johnsen - ITA Vice President, Raleigh, NC

NASBA Registry Information

Credit Hours: Up to 14 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
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.