

Monday - Wednesday
November 9-11, 2020



Monday, November 9

| Tracks / Sessions All Eastern | | CR TRACK Zoom Room 1 | ITL TRACK Zoom Room 2 | ITL Tactical Roundtables Zoom Room 3 |
|----------------------------------|----------|--|---|---|
| 10:40 AM | 12:00 PM | Opening Session President's State of the Association, Shawn Slavin, ITA President KEYNOTE - Elliot Eisenberg The Economy In 2021: Growing But Slowing | | |
| 12:15 PM | 1:15 PM | Driving Accountability And Performance In A Virtual World | Getting The Most From Your Microsoft Enterprise Agreement Renewal Process | |
| 1:30 PM | 2:30 PM | The Building Blocks Of A Winning Customer Success Team | Dynamic Audit Solution (DAS) Update | |
| 3:00 PM | 4:00 PM | Fight Fake News: Using Data Analytics To Get A Single Version Of The Truth | The Firm Of The Future | Tactical Roundtable - Service Delivery, Metrics & Support |
| 4:15 PM | 5:15 PM | The Subscription Prescription - How To Offer Your Company as a Service! | Strategic Roundtable | Tactical Roundtable - Security/Compliance |
| 7:00 PM | 8:30 PM | Optional Social Activity ITA Trivia Night | | |

Tuesday, November 10

| Tracks / Sessions All Eastern | | CR TRACK Zoom Room 1 | ITL TRACK Zoom Room 2 | ITL Tactical Roundtables Zoom Room 3 |
|----------------------------------|----------|---|--|---|
| 11:00 AM | 12:00 PM | KEYNOTE - Steven Rogelberg THE SURPRISING SCIENCE OF MEETINGS: How You Can Lead Your Team To Peak Performance | | |
| 12:15 PM | 1:15 PM | Strengthening Business Partnerships: Achieving Success Through Trust, Communication & Fairness | Practice Management Systems - What Are The Professional Services Needs Of Tomorrow | Tactical Roundtable - Application Development |
| 1:30 PM | 2:30 PM | Drive It Like You Stole It: How To Drive Your Company To Extreme Value | The Connected Firm In The Next Normal | Tactical Roundtable - Project Management |
| 3:00 PM | 4:00 PM | Driving Miss Daisy To Your Website – Digital Advertising Best Practices | Microsoft 365 Security | |
| 4:15 PM | 5:15 PM | "Death Of An Onsite Salesman" - Virtual / Remote Selling | DevOps or DevOps: Success Factors For Azure DevOps | |
| 7:00 PM | 8:30 PM | Optional Social Activity Virtual Wine Tasting <i>(REMEMBER -- Need to Register on ITA Website to get Wines shipped to you or just join for fun)</i> | | |

Wednesday, November 11

| Tracks / Sessions All Eastern | | CR TRACK Zoom Room 1 | ITL TRACK Zoom Room 2 | ITL Tactical Roundtables Zoom Room 3 |
|----------------------------------|-----------|--|---|---|
| 12:15 PM | 1:15 PM | The Challenges Of Adding A New ERP To Your Portfolio | Leveraging Microsoft Teams For Client Engagement | |
| 1:30 PM | 2:30 PM | Cybersecurity: Don't Worry...You'll Never Need To Be Concerned About This! | Resource Planning & Resource Scheduling For Professional Services In A Connected Firm | |
| 3:00 PM | 4:00 PM | 3:00 - 4:30 PM Suds And Buds, Bring Your Brew And Challenges! | Project Management For Professional Services In A Connected Firm | Tactical Roundtable - Infrastructure |
| 4:15 PM | 5:15 PM | (CR Roundtable Conversation) | Strategic Roundtable | |
| Mon 11/9 | Wed 11/11 | ITA FITNESS CHALLENGE <i>(See ITA website for details)</i> | | |

Monday - Wednesday
November 9-11, 2020



Session Descriptions and Speakers

CR – Consulting & Reselling
ITL-T – ITL Tactical

ITL – Internal Technology Leader
ITL-S – ITL Strategic

Monday, November 9

All

10:40 am – 11:00 pm Eastern

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 – 12:00 pm Eastern (60 CPE Minutes)

Keynote -- The Economy In 2021: Growing But Slowing

Elliott Eisenberg - GraphsandLaughs, LLC, Ventura, FL

Elliott Eisenberg, Ph.D. (aka, “The Bowtie Economist”) promises to entertain and educate as he discusses the short-term and longer-term health of the US economy. Dr. Eisenberg will discuss the most recent statistics on key topics such as the depth and breadth of the Sar-Cov-2 induced decline, the speed, shape and main drivers of the current economic recovery, the health of the labor market, inflation, future Federal Reserve policy, the importance and likelihood of a fourth stimulus bill, the deficit and debt, the housing market, business sentiment, corporate investment behavior, policy changes that are likely to occur given the election outcomes and much more. Eisenberg will close by comparing economic conditions across the nation and focusing on several key trends. After his prepared remarks, and time permitting, Dr. Eisenberg looks forward to taking questions from the audience. Be ready to take plenty of notes.

CR

12:15 – 1:15 pm Eastern (60 CPE Minutes)

Driving Accountability And Performance In A Virtual World

Moderator:

Bret Romney - Ascend Strategies, Inc, Montana City, MT

Panelists:

Kayley Bell – DSD Business Systems, San Diego, CA

Kelly A. Hummel – Net at Workl, NY, NY

Brian Terrell - BTerrell Group, LLP, Addison, TX

The past six months has likely posed real challenges to your leadership, with many new issues gnawing at your peace of mind. But knowing your employees are productive and accountable doesn’t have to be one of them. Even if you’ve led a virtual team before, the need to adapt your playbook to thrive in an increasingly remote world is a given. This session will mix panelist questions, breakout discussions and full group discussion to explore:

- How to ensure remote employees are engaged and productive
- How to drive self-accountability to eliminate the need to micromanage or worry
- How effective virtual meetings and one-on-ones are integral to your playbook

ITL-T

12:15 – 1:15 pm Eastern (60 CPE Minutes)

Getting The Most From Your Microsoft Enterprise Agreement Renewal Process

Moderator:

Brad Place – LBMC, PC, Brentwood, TN

Panelists:

Michelle Pinto - Crayon Software Experts LLC, San Francisco, CA (area)

Steve Ermish – Opkalla, Charlotte, NC

Aadil Nanji – Info-Tech Research Group, Toronto, ON, Canada

Interact with a panel of experts on the best options and techniques to get the most out of your licensing renewal process with Microsoft.

CR

1:30 – 2:30 pm Eastern (60 CPE Minutes)

The Building Blocks Of A Winning Customer Success Team

Moderator:

Mary Jo Mahood - e2b technologies, Inc., Cleveland, OH

Panelists:

Spence Decker - AcctTwo Shared Services, LLC, Houston, TX

Victoria George - Riva CRM Integration, Edmonton, AB, Canada

Steph Schreyer - Cargas Systems, Inc., Lancaster PA

Join us as we discuss why building a customer success team is the key to guiding customers' success journeys, increasing their engagement, and winning their loyalty. Discussions will include stories from successful practice leaders from fellow ITA firms.

ITL-T

1:30 – 2:30 pm Eastern (60 CPE Minutes)

Dynamic Audit Solution (DAS) Update

Moderator:

Michael Pynch – Wipfli LLP, Eau Claire, WI

Panelists:

James Bourke - WithumSmith+Brown, Red Bank, NJ

Peter J. Scavuzzo – Marcum LLP, NY, NY

Brian Siet - CPA.com / AICPA, NY, NY

To modernize and enhance the quality, efficiency, and value of audits, the AICPA, CPA.com, and participating firms from the AICPA's Major Firms Group continue to develop a transformational audit methodology called Dynamic Audit Solution (DAS). In this session, Bran will provide an update on this important initiative.

CR

3:00 – 4:00 pm Eastern (60 CPE Minutes)

Fight Fake News: Using Data Analytics To Get A Single Version Of The Truth

Moderator:

Igal Rabinovich – Net at Work, NY, NY

Panelists:

Julio Baylac - BAASS Business Solutions Inc., Miami, FL

Joni Girardi – DataSelf Corp., Santa Clara, CA

Arline Welty – DataQuest, Inc., Chicago

Tom Vance – SWK Technologies, Inc., Phoenix, AZ

Fighting corporate fake news is always essential. Learn how to help your customers do so by embracing BI and analytics to empower your clients with KPIs to find their single version of the truth. A panel of BI experts will discuss strategies that have helped ERP VARs empower clients with BI tools and KPIs.

ITL-S

3:00 – 4:00 pm Eastern (60 CPE Minutes)

The Firm Of The Future

Moderator:

John Gamble – BKD, LLP, Springfield, MO

Panelists:

Richard Kopelman – Managing Partner & CEO, Aprio, LLP, Atlanta, GA

Jeff Ward - Third-Party Attestation National Managing Partner, BDO USA, LLP, St. Louis, MO

Tom Watson – CEO-Elect, BKD, Dallas, TX

Remember the world as portrayed in the Jetson's, 2001: A Space Odyssey or the Fifth Element. Now imagine how innovative accounting firms will look and operate in a future where two things are certain. The world will be different, and technology will play a huge role. Listen to our panel of accounting firm CEOs as they discuss their visions for the firm of tomorrow. The esteemed panel will be interviewed by a professional services industry futurist and thought leader.

ITL-T

3:00 – 4:00 pm Eastern (60 CPE Minutes)

ITL Tactical Roundtable - Service Delivery, Metrics & Support

Nathan Gaude – Elliott Davis, LLC – Greenville, SC

Roundtable Support Discussion Topics:

- What would you do differently if you had to set up all your users for working from home?
- Has it been a success or a stressful time for your support staff? Have you faced any staffing challenges during the past 7 months?
- Have your business units been easy to work with during the past 7 months, or more challenging? Are they expecting more or less from your staff while people work from home?
- Has your hardware failure rate (and repair rate) gone up since WFH (working from home) started?
- What major projects are you working on leading up to tax season?
- How has the morale been with your IT teams, specifically the support team, during WFH?
- Now that more people are coming back into the office, are there projects that you need to evaluate and remove from your project pipeline?
- Are you happy with your current Ticketing system? Why or why not?
- Have you been tracking KPI's the same during WFH or have you changed metrics?
- Have you noticed more or less security incidents (lost laptops, opening malware, etc.) during WFH?
- Have you found any cool / new apps or programs that you want to investigate for your support staff?
- How are you primarily staying in touch with your teams that are still WFH?
- Open Topics for discussion.

CR

4:15 – 5:15 pm Eastern (60 CPE Minutes)

The Subscription Prescription - How To Offer Your Company as a Service!

Moderator:

Brian Terrell - BTerrell Group, LLP, Addison, TX

Panelists:

Justin Lake – Skyllful, Denver, CO

Nick Brorson – Sockeye, Anchorage, AK

Author Tien Tzuo writes in **Subscribed: Why The Subscription Model Will Be Your Company's Future**: "But just imagine what would happen at the next Apple keynote if Tim Cook announced a simple monthly Apple subscription plan that covered everything: network provider charges, automatic hardware upgrades, and add-on options for extra devices, music and video content, specialty software, gaming, etc. Not just an upgrade program, but Apple as a Service."

Many firms make some sort of recurring revenue offer to their clients. But what about charging one monthly price for everything you offer? Not just software, but also implementation, training, and support. Is this even possible? Come find out who's blazing this trail, how they are doing it, how it is working for them, and how you can offer Your Company as a Service!

ITL-S

4:15 – 5:15 pm Eastern (60 CPE Minutes)

ITL Strategic Roundtables

David Hirschhorn – Eide Bailly LLP, Fargo, ND

Join our Board of Directors representative, David Hirschhorn as he leads our ITL CIO's in a discussion of how firms and your technology challenges changing because of the transition to 'Work from Home' in 2020. Reminder - participation in Strategic roundtables are limited to ITL CIO and their designated firm representatives only. Thank you for your cooperation.

ITL-T

4:15 – 5:15 pm Eastern (60 CPE Minutes)

ITL Tactical Roundtable – Security/Compliance

Cody Ray – BKD, LLP, Springfield, MO

Cloud Front – A discussion about cloud based firewalls and EDR solutions for today's user threat in a remote working environment.



Optional Event

7:00 – 8:30 pm Eastern

Trivia Night

Moderator – Steve Krueger, Chortek LLP, Appleton, WI

Join in on our ITATrivia Event and strive to be on the ITA Leader Board. The Top 3 will win an Amazon eGift card. Topics will be: ITA Trivia, Computers, Movies, Soft Drinks, Geography, Presidential, Celebrities, Golf, Holiday, and Sports trivia questions. Jeopardy, Trivial Pursuit and just plain Trivia fans will enjoy this social ITA activity.

- No Cost and No Pre-Registration for this Event
- Join Monday 11/9 @ 7:00-8:30pm Eastern (details in ITA EventMobi Link* to be sent prior to meeting)

[Click Here for more information](#)

FITNESS
INCREASES IN VALUE
WHEN SHARED



Optional Event

ITA Fitness Challenge

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're invited to participate in the first-ever ITA Virtual Fitness Challenge.

- Join the italand facebook group and post your goal
- Note: No Cost for the Event nor cost for the participant shirts

[Click Here for more information](#)

All

11:00 am – 12:00 pm Eastern (60 CPE Minutes)

Keynote – THE SURPRISING SCIENCE OF MEETINGS: How You Can Lead Your Team To Peak Performance

Steven G. Rogelberg – University of North Carolina, Charlotte, ND

“Pointless, exhausting meetings are the bane of most employees’ existence. But it does not have to be this way.” Join Dr. Steven Rogelberg as he shares meeting science that can bring solutions forward to solve the meeting “problem.” Dr. Rogelberg, a highly decorated and award-winning researcher, speaker, and teacher, shares an exciting evidence-based path for organizations, teams, committees, and leaders to realize the true potential of meetings and assure ROI on what is a massive investment of time. Author of the “The Surprising Science of Meetings: How You Can Lead Your Team to Peak Performance,” noted as the #1 leadership book by the Washington Post, and featured guest on shows such as CBS This Morning, Freakonomics, and BBC World, Dr. Rogelberg consults for small and large organizations, including IBM, Amazon, TIAA, Cisco, KPMG, and Procter & Gamble.

CR

12:15 – 1:15 pm Eastern (60 CPE Minutes)

Strengthening Business Partnerships: Achieving Success Through Trust, Communication & Fairness

Rocco Luisi – Best Selling Author and Speaker

Strengthening Business Partnerships is a system invented by Rocco Luisi to improve relationships between company co-owners so you make more money, have more time to do what you want, and have more freedom. We do this by building trust, improving communication and treating each other fairly. When you create a positive environment by improving owner relationships, your company will not only survive, but thrive to the next generation or well-timed sale.

ITL-S

12:15 – 1:15 pm Eastern (60 CPE Minutes)

Practice Management Systems – What Are The Professional Services Needs Of Tomorrow

Moderator:

Kevin Fraase – Eide Bailly LLP, Fargo, ND

Panelists:

Dan Mallory – Aprio, Atlanta, GA

Greg Shoemaker – BKD, LLP, Dallas, TX

Elena Truelove – MNP LLP, Calgary, AB Canada

Building on the ideas discussed in ‘Firm of the Future’, this panel discussion will focus specifically on the types of functionality needed to support more robust time management, streamlined billing processes, improved data analytics and reporting, and mobile access.

ITL-T

12:15 – 1:15 pm Eastern (60 CPE Minutes)

ITL Tactical Roundtable – Application Development

Anthony D. Maughan – BKD, LLP, Springfield, MO

Topics to be addressed:

- Rapid Delivery
- Team Structures
- Popular languages

CR

1:30 – 2:30 pm Eastern (60 CPE Minutes)

Drive It Like You Stole It: How To Drive Your Company To Extreme Value

Linda Rose – RoseBiz, Inc., Encinitas, CA

Are you a business owner; then you need to know how much your firm is worth today and be in the next 12-60 months? The key to selling your company is understanding what drives valuation and what specific buyers (Strategics and Private Equity) look for in assessing a channel partner. In this session, Linda will give actual EBITDA value (by partner type), the eight essential variables buyers look for when valuing a company, KPI's to strive for, and the different valuation methods used.

Whether you are contemplating a sale or a buy in the next 12 months or 60 months, this is a session you won't want to miss. Live participants will get access to the Value Maximizer™ Assessment and other tools. Linda will also be giving away to select partners, an Audible copy of her best-selling book Get Acquired for Millions. Come get the keys to drive your firm towards maximum value and get the rewards you have worked so hard for.

ITL-S

1:30 – 2:30 pm Eastern (60 CPE Minutes)

The Connected Firm In The Next Normal

Facilitator:

Rob Lewis – RubinBrown LLP, St. Louis, MO

Panelists:

Richard Baskerville – Intapp, London, England

Mark Holman – Intapp, Palo Alto, CA

Jose Lazares – Intapp, Palo Alto, CA

Competition is increasing as the professional services landscape grows more complex, and clients demand both a better experience, getting more value from their business partners. Today, with the events of 2020, change has only been accelerated. Firms recognize that there's no going back to the "old ways," where business intelligence could be gathered by walking up and down the hall.

The firm that thrives in the "next normal" — the Connected Firm — will be able to unleash the power of its collective knowledge to supercharge its people. From business development to client service delivery, they will harness the power of their own data and systems. The Connected Firm must embrace tools and technologies that enable collaboration and connect processes, people, and teams across the firm. These firms must equip themselves to take data previously locked in siloes and convert it into actionable insights. Data that not only drives better business outcomes but increases staff and client satisfaction. The firm that thrives in the "next normal" — the Connected Firm — will be able to unleash the power of its collective knowledge to supercharge its people, from business development to client service delivery, by harnessing the power of its own data and systems. By embracing tools and technologies that enable collaboration and connect processes, people, and teams across the firm, the Connected Firm is equipped to take data that was previously locked in siloes and convert it into actionable insights that not only drive better business outcomes, but increase staff and client satisfaction.

ITL-T

1:30 – 2:30 pm Eastern (60 CPE Minutes)

ITL Tactical Roundtable – Project Management

Shawn Gospodarek – Elliott Davis, LLP, Greenville, SC

These are the Project Management Roundtable Topics that will be discussed:

1. Switching our Innovation and Project Management focus from Revolution to Evolution
 - Revolution or Radical – Benefits, Risks, Adoption
 - Evolution or Incremental – Benefits, Risks, Adoption
 - Which method works for your team?
2. Project Management during the COVID 19 Pandemic.
 - Communication and Collaboration – How has this changed?
 - Constraint changes – Time, Money, Quality – changed for better or worse?
 - Monitoring Projects – Challenges and Risks.

CR

3:00 – 4:00 pm Eastern (60 CPE Minutes)

Driving Miss Daisy To Your Website – Digital Advertising Best Practices

Rick Gore – Avalara, Seattle, WA

Doug Pullman – Avalara, Seattle, WA

The company website is at the center of most marketing strategies, but your website is only as good as your ability to drive people there. There are many facets to a successful digital advertising plan. You've got your organic search, paid search, display ads, organic social, paid social, and retargeting. You've got to nail keywords, visuals, messaging, targeting, and the experience after they click. It's enough to make your head spin. In this session, we'll focus on some key best practices you can apply to effectively drive your target prospects to your website and ultimately fill the pipeline.

ITL-S

3:00 – 4:00 pm Eastern (60 CPE Minutes)

Microsoft 365 Security

Facilitator:

Jeff French – Elliott Davis, LLP, Greenville, SC

Panelists: *Go Cooper – RubinBrown LLP, St. Louis, MO*

Jeff Cooper – RubinBrown LLP, St. Louis, MO

Matt Manley – Elliott Davis, LLC, Chattanooga, TN

Nate Roberts – Wipfli LLP, Green Bay, WI

The majority of ITA firms leverage Microsoft 365 to one extent or another. This panel will focus specifically on how the represented firms utilize the 365 security suite. Microsoft offers a comprehensive set of security and compliance features covering everything from e-mail protection, identity protection, threat and vulnerability management, endpoint detection/response, etc. However, all of these features potentially come with significant cost; alerts, dashboards, and data have to be managed. Panelists will discuss which features they are utilizing and their strategies to consume alert data, analyze dashboards, and respond to threats in meaningful ways.

CR

4:15 – 5:15 pm Eastern (60 CPE Minutes)

“Death Of An Onsite Salesman” – Virtual / Remote Selling

Moderator:

Steve Krueger – Chortek LLP, Appleton, WI

Panelists:

Patty Benitz – APS Payments, Chicago, IL

Walter Goodfield – RKL eSolutions LLC, Lancaster, PA

Cheryl Masseth – LDK Consulting, Ltd., Mesa, AZ

Some have been selling remotely for some time. Others find that CoViD-19 forcing them to embrace remote selling for the first time now that CoViD is here.

In this session, we will cover ways to introduce prospects to your firm and the services you offer while practicing proper social distancing. You will learn to build rapport, establish a relationship, and demonstrate the value your firm can bring to each potential customer. We will also cover how to conduct a discovery process and perform virtual tours. These steps will ensure that you understand the prospect's essential needs and confirm that your solution meets those needs; ultimately producing a successful implementation.

Finally, we will discuss ways to share your firm's solution vision, deliver your proposal, and close the deal, all without leaving your office. Most of us have mastered selling in person. Some have also mastered selling remotely. However, many of us still have room to improve closing deals in today's remote environment.

ITL-T

4:15 – 5:15 pm Eastern (60 CPE Minutes)

DevOps or DevOps: Success Factors For Azure DevOps

Facilitators:

Anthony D. Maughan – BKD, LLP, Springfield, MO

Elena Truelove – MNP LLP, Calgary, AB Canada

Panelists:

Sandeep Nathwani – MNP LLP, Calgary, AB, Canada

Grant Rufus – Eide Bailly LLP, Fargo, NC

Ken Schram – Wipfli LLP, Wausau, WI

Microsoft's Azure DevOps platform embraces the DevOps philosophy to streamline collaboration between Development and Operations to respond to rapidly changing business needs and deliver value to the organization faster.

Join our ITA Member Firms panel as they share their challenges and successes with Microsoft's Azure DevOps platform. These firms use Azure DevOps in one or more of the following five areas: Boards, Pipelines, Repos, Test Plans, and Artifacts.

For those new to either the DevOps philosophy or to Azure DevOps, you will leave with an appreciation of the tool, its alignment to the foundational DevOps concepts, and its capabilities compared to other tools in the market. Current Azure DevOps users will discover tips, tricks, and lessons learned to help you leverage the tool for maximum effectiveness – from work item and task management to streamlined deployment of both code and infrastructure. Questions and open discussion is highly encouraged!



Optional Event

7:00 – 8:30 pm Eastern

Wine Tasting

Join us for a Virtual Wine tasting event hosted by **Voluptuary Winery**, a small-batch Winery based in Sacramento. We'll be learning about (and tasting) 5 different wines. If you prefer... you can request:

- A non-alcoholic, Winery-made juice option.
- OR ... just join the FUN!

[Click Here for more information](#)



Optional Event

ITA Fitness Challenge

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're invited to participate in the first-ever ITA Virtual Fitness Challenge.

- Join the italand facebook group and post your goal
- Note: No Cost for the Event nor cost for the participant shirts

[Click Here for more information](#)

CR

12:15 – 1:15 pm Eastern (60 CPE Minutes)

The Challenges Of Adding A New ERP To Your Portfolio

Moderator:

Mike Yeager – Cargas Systems, Inc., Lancaster, PA

Panelists:

Karen Bodach – BKD, Indianapolis, IN

Jodie Macariola – Cargas Systems, Inc., Lancaster, PA

Lynne Henslee – e2b technologies, Inc., Chardon, OH

Adding a new ERP solution to your firm's portfolio is one of the most challenging decisions the VAR leader has to make. It is not for the faint of heart! The cost and time required to add a new solution successfully are always longer and more costly than we initially think. In this session, you will learn from our experienced CR leaders about their best practices to successfully add a new ERP product. You will:

- Find out about their mistakes and how they learned to avoid repeating them in the future
- Learn how to position your new ERP solution within your current product portfolio.
- Know when do you add dedicated resources to your new practice,
- Project when to expect a return on your investment.

ITL-T

12:15 – 1:15 pm Eastern (60 CPE Minutes)

Leveraging Microsoft Teams For Client Engagement

Moderator:

Dan Mallory – Aprio, Atlanta, GA

Panelists:

Paul Blowers – Plante Moran, Southfield, MI

Kevin Fraase – Eide Bailly LLP, Fargo, ND

Jeff French – Elliott Davis, LLP, Greenville, SC

There is no doubt the pandemic has accelerated the use of remote collaboration processes and tools and Microsoft Teams is at the forefront of the conversation. While Microsoft Teams offers a little bit of everything, today's discussion focuses squarely on leveraging Microsoft Teams as a client engagement tool.

Join us as we explore the experiences of three firms spanning the adoption spectrum and get tips to navigate your firm through modern client collaboration approaches.

CR

1:30 – 2:30 pm Eastern (60 CPE Minutes)

Cybersecurity: Don't Worry...You'll Never Need To Be Concerned About This!

Jeff Mc Corpin - LBMC Technology Solutions, Brentwood, TN

We all know this is not true. Today more than ever, security is the number one topic on most organizational IT whiteboards. Statistics show our own worst enemy when it comes to security, is each of us, and the actions we take or do not take to be cyber safe. Maybe your organization has had a breach, or perhaps you have had your identity compromised. Hear from security experts on the following:

- What I wished I had known before my corporate or personal identity was stolen
- What I wished I had known before we discovered ransomware on my network
- What about recovery time objectives?
- Real-life customer events and how they recovered
- Are you or your company listed on the Dark Web?
- What is the Dark Web anyway?
- How to find out if you are out there and what to do about it
- Can I even prevent ransomware attacks or identity thefts?
- Steps you can take tomorrow morning to reduce your security risks
- Processes and procedures you should have in place
- Cyber Insurance

ITL-S

1:30 – 2:30 pm Eastern (60 CPE Minutes)

Resource Planning & Resource Scheduling For Professional Services In A Connected Firm

Moderator:

Nick Cadden - Carr, Riggs & Ingram, LLC, Enterprise, AL

Panelists:

Mark Castiglioni – Magenic, Chicago, IL

Vance Lowe – Magenic, Sumrall, MS

For most people, just mentioning “Who’s on First?” brings to mind the classic Abbot and Costello routine in which Abbot’s response to Costello’s answer of a seemingly simple question increases in hilarity the longer it goes.

As you reminisce on the familiar tongue-in-cheek exchange, similar, daily interactions happening in your Firm will probably come to mind. Replace Abbott with your privileged array of overly enthusiastic architects who administer a multitude of inordinately complex Excel or SharePoint-based, home-grown processes to manage project budgets and staffing resource allocation in your organization. Costello then becomes any poor soul who simply wants to know the details of WHO, WHAT, WHEN, and WHERE for a given project so that they can figure out HOW to best approach their day.

CR

3:00 – 4:30 pm Eastern (90 CPE Minutes)

Suds And Buds, Bring Your Brew And Challenges! (CR Roundtable Conversation)

Darcy Boerio – DAB Partners, Brandon, FL

Dom Pernai – ETHOSystems, Chicago, IL

Want to discuss your favorite sessions further? Attend this session for an open give and take regarding the sessions you found most thought-provoking. We look forward to seeing you there!

ITL-S

3:00 – 4:00 pm Eastern (60 CPE Minutes)

Project Management For Professional Services In A Connected Firm

Moderator:

Kevin Fraase – Eide Bailly LLP, Fargo, ND

Panelists:

Nicolas Torraca – CohnReznick, Roseland, NJ

Mike Denno – Rehmann, Saginaw, MI

Travis Webb – BKD, LLP, Springfield, MO

Successfully serving our clients while managing the details and tasks of the job, controlling costs, and efficiently utilizing people requires our partners and staff to have effective project management tools—and skills. In this session, our panelists will discuss the types of project management tools their users have requested and their solutions to address those requests. We will also discuss the involvement—if any—that our IT operations have had in providing project management guidance.

ITL-T

3:00 – 4:00 pm Eastern (60 CPE Minutes)

ITL Tactical Roundtable – Infrastructure

Tom Lenz – Wipfli LLP, Wausau

How do you handle access to and privacy of applications and data for these types of needs?

- Foreign employees – Off shoring
- Access for contactors or GIG workers
- Access for other 3rd party accounting firm review and other non-firm access needs

ITL-S

4:15 – 5:15 pm Eastern (60 CPE Minutes)

ITL Strategic Roundtables

Greg Shoemaker – BKD, LLP, Dallas, TX

Shawn P. Slavin – ITA President, Owasso, OK

Join our ITL Planning Committee Chair, Greg Shoemaker as he leads our ITL CIO's in a discussion of the major gaps in current Practice Management solutions that each firm plans to fill in the coming 3 to 5 years. 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.

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* *ITA EventMobi is ITA's Mobile/Online Application that will be used to share meeting details. About one week prior to the meeting, you will get an email about how to use this tool as well as other necessary information to participate.*

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November 9-11, 2020



NASBA Registry Information

Credit Hours: Up to 16.8 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 two tracks of educational content: IT Software Consulting (Sales, Support and Implementation) and Internal IT for large CPA Firms. 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.