July 19-20, 2021

VIRTUAL

Internal Tech Leaders

SUMMER MEETING

Monday, July 19

		Strategic Track	Tactical Track
11:45 AM	12:00 PM	Welcome By ITA President	
12:00 PM	1:00 PM	What's The Point Of The Office'Now?	Hello Rrom A Distance - The New Employee Onboarding Experience
1:00 PM	1:15 PM	Break	
1:15 PM	2:15 PM	Still Stuck At The Kids' Table? – How to Change The Way Your Leadership Views IT	What Does The World Of The Office Worker Look Like In The New Normal?
1:15 PM	2:45 PM	Break	
2:45 PM	3:45 PM	ITL Financial And Application Metrics Review Session *Note: Only firms who submitted Metrics data will be permitted to attend.*	High Profile Cyber Security Breaches And Ransomware Attacks Are Dramatically Increasing. What Are You Doing to Prepare?
3:45 PM	4:00 PM	Break	
4:00 PM	5:00 PM	Strategic Roundtable	Tactical Roundtables

Tuesday, July 20

		Strategic Track	Tactical Track
12:00 PM	1:00 PM	Is Automation Over-Hyped?	Why Is Change Management And Adoption So Hard? And How To Make It Easier.
1:00 PM	1:15 PM	Break	
1:15 PM	2:15 PM	Outsourcing Business Practices And Functions Aren't Without Risks. How Is IT Helping The Business Succeed?	Rescue Your Legal Team Through Risk-Mitigating Technologies
1:15 PM	2:45 PM	Break	
2:45 PM	3:45 PM	Surviving In Today's 'Red Ocean' Of Recruiting	Data Dumpster Disasters (And How To Avoid Them)
3:45 PM	4:00 PM	Break	
4:00 PM	5:00 PM	Strategic Roundtable: Diversity, Equity, And Inclusion	Tactical Roundtables

Monday, July 19

11:45am – 12:00pm
Track – ALL

Welcome By ITA President

Shawn Slavin – ITA President, Owasso, OK

Join ITA President, Shawn Slavin, as he kicks off the Summer ITL Meeting and reviews the agenda for the two-day meeting.

12:00 – 1:00pm
Track – Strategic CPE – 60 min.

What's The Point Of The Office Now?

Facilitator:
Josh Anderson – Wipfli LLP, Eau Claire, WI
Panelists:
Lynn Davis – RubinBrown LLP, St. Louis, MO
Daniel L. Fernholz – CLA, Minneapolis, MN
Matt Jennings – Baker Tilly, Madison, WI

While the Working From Home (WFH) movement had been established before the Covid pandemic, the pandemic greatly accelerated the trend. Firms pivoted to conduct business with an entirely remote and distributed workforce and learned that it could work on a massive scale. Fears over big drops in productivity did not occur and employees found they prefer some sort of continuation of WFH post-pandemic. This discussion will focus on the how to leverage both work practices to maximize productivity based upon the nature of the work that needs to be done.

12:00 – 1:00pm
Track –TacticaL CPE – 60 min.

Hello From A Distance - The New Employee Onboarding Experience

Firms are recruiting in all job markets to obtain the best talent even though they may not have a physical presence. This discussion will focus on what peer firms are doing to onboard employees from technology asset distribution, training, the employee experience and how they have been successful saying hello from a distance.

1:15 – 2:15pm
Track – Strategic CPE 60 min.

Still Stuck At The Kids' Table? – How to Change The Way Your Leadership Views IT

Many IT Leaders struggle to communicate the business value of IT to executive leadership, using tactical measures and metrics that do not convey business value. IT Leaders should craft their value message and the supporting metrics as a narrative that tells how IT has impacted critical business outcomes.

1:15 – 2:15pm
Track – Tactical CPE 60 min.

What Does The World Of The Office Worker Look Like In The New Normal?

Firms are looking to move back to the new normal of working from a firm or client office. This discussion will focus on where peer firms are in this journey, what percentage of employees are expected to be onsite in the new normal, modifications to office leases, changes to space configurations, hoteling, COVID mitigation, whether vaccination proof is required, and how the client experience will be affected.

2:45 – 3:45pm
Track – Strategic CPE – 60 min.

ITL Financial And Application Metrics Review Session

Note: Only firms who submitted data will be permitted to attend.

In this session, we'll examine the results of this year's application and financial metrics reporting, discuss areas that need to be better defined and/or improved and review how the information will be collected, assembled and reported into the future. The session will also include a high level review of the data collected. Note: Only firms who submitted 2021 Metrics data will be permitted to attend.

2:45 – 3:45pm
Track – Tactical CPE – 60 min.

High Profile Cyber Security Breaches And Ransomware Attacks Are Dramatically Increasing. What Are You Doing to Prepare?

Have recent news headline ransomware events and security incidents caused you to change your firm's security practices? Are your incident response plans, cyber insurance policies, security awareness training, security controls , access levels, disaster recovery, back-up process, crisis communication plans, etc, where they need to be? What keeps you up at night? Is and should your Board be concerned? How are you balance the need for security with user experience?

4:00 – 5:00pm
Track – Strategic CPE – 60 min.

Strategic Roundtables

Content TBD

4:00 – 5:00pm
Track – Tactical CPE – 60 min.

Tactical Roundtables

The ever-popular ITL Tactical Roundtables for this Meeting 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!

Sessions and Table Leaders (TBD):

Application Development
Infrastructure/Engineering
Service Delivery, Metrics and Support
Project Management
Security/Compliance

Tuesday, July 20

12:00 – 1:00pm
Track – Strategic CPE – 60 min.

Is Automation Over-Hyped?

Panelists:
John Bowles – DHG, Hendersonville, NC
Dustin Checkai – Baker Tilly, Madison, WI
Arvind Krishnamurthy – Crowe LLP, New York, NY
Jamie Simmons – Moss Adams LLP, Seattle, WA

Automation, especially Robot Process Automation, has captured the attention of businesses and the accounting and tax firms is no exception. However, firms may become disappointed with their own automation results when compared to the well-publized success stories in other industries. Come here what your peer firms are doing in this area and the success stories and hard-fought lessons learned related to the practical application of automation to their businesses.

12:00 – 1:00pm
Track –TacticaL CPE – 60 min.

Why Is Change Management And Adoption So Hard? And How To Make It Easier.

Perla Ramirez – Crowe LLP, Oak Brook, IL

Capabilities and features of software have improved over time. SaaS applications in particular are constantly introducing enhancements and new features as they are no longer bounded to the annual time-consuming on-premises upgrade/update projects. However, users may not even be aware of the latest enhancements or struggle to understand their value or how to use them effectively to get work accomplished. Hear what some of your peer firms are doing to maximize their technology investments through improved user adoption of these platforms.

1:15 – 2:15pm
Track – Strategic CPE 60 min.

Outsourcing Business Practices And Functions Aren't Without Risks. How Is IT Helping The Business Succeed?

Many firms are successfully outsourcing business practice functions such as accounting services to reduce costs, improve productivity, scale resources, obtain expertise and save time. There are several information technology components to consider; security, compliance, 7216, data, VDI, system access, etc. Come hear what your peer firms are doing to help make their business practices successful while mitigating risks.

1:15 – 2:15pm
Track – Tactical CPE 60 min.

Rescue Your Legal Team Through Risk-Mitigating Technologies

Facilitator:
Doug Anderson – Crowe LLP, South Bend, IN
Panelists:
Shawn M. Gerlach – CLA, Greenwood Village, CO
Joshua Kuntz – Crowe LLP, South Bend, IN

In today's litigious happy society, firm legal teams are overwhelmed by the increasing work involved with keeping their firms out of legal trouble. Engage in a dialog regarding how the application of technology and solutions can empower your firm's legal teams to meet the ever growing challenges of today and in the future.

2:45 – 3:45pm
Track – Strategic CPE – 60 min.

Surviving In Today's 'Red Ocean' Of Recruiting

The economy and job market is heating up quickly as the employer/employee pendulum has swung over in favor of employees. The pandemic has demonstrated that work from anywhere is possible, opening up opportunities for job seekers no longer constrained by a geographic location. Engage in a discussion on what recruiting and employee retention strategies with your peer firms intended to win the 'War for Talent'.

2:45 – 3:45pm
Track – Tactical CPE – 60 min.

Data Dumpster Disasters (And How To Avoid Them)

Facilitator:
Ken Schram – Wipfli LLP, Wausau, WI
Panelists:
Thomas J. Graf - Cherry Bekaert LLP – Richmond, VA

Whether structure or unstructured, data is a critical asset to drive operations, help firms deliver value to their clients and make informed decisions to facilitate growth. In our digital world, keeping track of the location and integrity of that valuable asset can be fraught with challenges. Join us as this panel explores:

- How data sprawl has raised challenges in information management strategies
- What tools\tactics have been used in an attempt to resolve data sprawl
- What you can do to prevent data sprawl before it starts

4:00 – 5:00pm
Track – Strategic CPE – 60 min.

Strategic Roundtable: Diversity, Equity, And Inclusion

Facilitator:
David Romero – Wipfli LLP, Eau Claire, WI

Roundtable discussion: COVID-19 and social movements such as Black Lives Matter have been catalysts in updating the definition of teams that can thrive amid uncertainty. IT Leaders must combine diversity in its many forms, establish equity and ensure inclusion in distributed team settings to make their teams truly antifragile.

4:00 – 5:00pm
Track – Tactical CPE – 60 min.

Tactical Roundtables

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NASBA Registry Information

Credit Hours: Up to 9.5 hours of CPE available. CPE credits are granted on a 50-minute hour. After the first hour, sponsors can report half-credits. **However,** half-credits are not allowed / approved in all states. If half-credits are **not** allowed, participants need to round back to the last full credit.

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

Program Content: The program will feature three tracks of educational content: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and 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.