



Sunday, April, 23					
2:30 ^{PM} - 5:00 ^{PM}	BADGE PICKUP Parq Grand Foyer				
3:30 ^{PM} - 4:30 ^{PM}	MEET, GREET AND EAT - Session to meet New Members and First Timers Granville				
4:30 ^{PM} - 6:00 ^{PM}	ITA GENERAL SESSION Parq Grand D/E President's Welcome - Shawn Slavin Keynote: The Freak Factor: Discovering Uniqueness By Flaunting Weakness - David Rendall				
6:00 ^{PM} - 7:30 ^{PM}	SUNDAY NIGHT WELCOME RECEPTION Douglas Parq Level 6th Floor				
7:30 ^{PM}	Dinner On Your Own and Various Partner Events				
Monday, April 24					
7:00 ^{AM} - 8:00 ^{AM}	Breakfast Parq Grand F				
7:00 ^{AM} - 5:00 ^{PM}	BADGE PICKUP Parq Grand Foyer				
8:00 ^{AM} - 9:30 ^{AM}	ITA GENERAL SESSION Parq Grand D/E ITA's Leadership Alliance (ILA) Graduation - Shawn Slavin, ITA President Special ITA Presentation - Lissa Johnsen, ITA Vice President Keynote: Three Keys To Always Get What You Pay For - Mike Scott				
10:00 ^{AM} - 12:00 ^{PM}	WORKSHOP 1 Parq Grand D The Tale of Two Hybrids: Building A Performance-driven Post-Pandemic Workplace	WORKSHOP 2 Parq Grand B/C How To Get Exactly What You're Paying For - Accountability Pays Off!	WORKSHOP 3 Parq Grand E Shaping The Future of CAS Together		CIO ACADEMY Parq Grand A Building Stakeholder Relationships <small>Session ONLY For ITL CIOs or Their Designee (1 Per Firm)</small>
12:00 ^{PM} - 1:15 ^{PM}	LUNCH Parq Grand F				
1:15 ^{PM} - 3:15 ^{PM}	WORKSHOP 1 The Tale of Two Hybrids: Building A Performance-driven Post-Pandemic Workplace (Continued)	WORKSHOP 2 How To Get Exactly What You're Paying For - Accountability Pays Off! (Continued)	WORKSHOP 3 Shaping The Future of CAS Together (Continued)		CIO ACADEMY Building Stakeholder Relationships (Continued)
TRACKS & SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING SERVICES (CAS) Parq Grand E	Internal Tech Leaders (ITL)	
	CR TRACK 1 & COMBINED Parq Grand D	CR TRACK 2 Stanley		ITL TACTICAL Parq Grand B/C	ITL STRATEGIC Parq Grand A
3:30 ^{PM} - 5:00 ^{PM}	ITA Speed Dating – Ignite On Steroids	The Worst Demo I Ever Did: Key Learnings from Our Lowest Moments	Going From “Good” To “Great”: Upskilling And Future-Proofing The Team	ITL Tactical Roundtables	Strategic Roundtables
5:00 ^{PM} - 6:00 ^{PM}			CAS & CIO/ITL Collaboration: Is IT really A Pain In The CAS? (Beverage Service)		CAS & CIO/ITL Collaboration: Is IT Really A Pain In The CAS? (Beverage Service) Parq Grand E
6:00 ^{PM} - 9:00 ^{PM}	EVENING DINNER Kitsilano Ballroom				
Tuesday, April 25					
7:00 ^{AM} - 8:00 ^{AM}	Breakfast Parq Grand F				
TRACKS & SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING SERVICES (CAS) Parq Grand E	Internal Tech Leaders (ITL)	
	CR TRACK 1 & COMBINED Parq Grand D	CR TRACK 2 Stanley		ITL TACTICAL Parq Grand B/C	ITL STRATEGIC Parq Grand A
8:00 ^{AM} - 9:15 ^{AM}	Can CAS And CR Be Friends? What Is CAS And Do We Want It?	Publisher And VAR Panel: Two Sides Of The Same Coin	Offshoring Strategies & Realities	Unleashing The Power Of Low Code: Overcoming Challenges And Celebrating Successes	Out Of The Box: A Panel On Crafting Innovation COEs For Accounting Firms
9:30 ^{AM} - 10:45 ^{AM}	Top-Performing Partners Reveal KPIs That Deliver Growth	Securing Tomorrow's ERP Channel Talent: 4 Questions for 4 ERP Leaders from Avalara, Odoo, NetSuite (Neo3) & Acumatica (PC Bennett Solutions)	How To Maximize Your Vendor Relationships	Intelligent Automation: Evolving Techniques, Practical Use & Case Studies Session ONLY For ITL Members	Supporting Firm Growth Through Offshore Resource Centers
11:00 ^{AM} - 12:15 ^{PM}	Learn The Art Of Storytelling To Accelerate Engagement And Conversions	Effective Communication - What Not To Say, When Not To Say It	BPO - A Different Approach in Offering CAS	Taking The Slop Out Of Cloud Sloperations	CIO 437: Advanced Cyber-Insurance Numismatics & VCR Repair
12:15 ^{PM} - 1:30 ^{PM}	LUNCH Parq Grand F				
1:30 ^{PM} - 3:00 ^{PM}	Personal And Company Branding – It Really Does Matter, More Than You Might Think		Getting It Done With Team And Tech	ITL Tactical Roundtables	ITL Strategic Roundtables
3:00 ^{PM} - 3:15 ^{PM}	CR Wrap Up Session Parq Grand D		CAS Wrap Up Session	ITL Wrap Up Session Parq Grand B/C	
Wednesday, April, 26					
8:30 ^{AM} - 3:00 ^{PM}	ITA Leadership Alliance (ILA) Base Camp Burrard (Note: Separate Registration Required)				



Session Descriptions and Speakers

Consulting & Reselling - CR
Internal Technology Leader Tactical - ITL-T
Internal Technology Leader Strategic - ITL-S
Client Accounting Services - CAS

Sunday, April 23 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)

4:30 – 4:45 pm

President's Welcome

Room: Parq Grand D/E

Shawn Slavin – ITA President, Owasso, OK

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

4:45 – 6:00 pm (75 CPE)

KEYNOTE: The Freak Factor: Discovering Uniqueness By Flaunting Weakness

Room: Parq Grand D/E

David Rendall – Certified Speaking Professional - Rendall & Associates, Inc., Pikeville, NC

Do you want more happiness, fulfillment, and energy?

Do you want to improve your relationships at work and at home?

Do you want to dramatically improve your productivity and increase employee performance?

Our parents, teachers, and managers have told us that, if we want to succeed, we should find and fix our weaknesses. However, this is the wrong approach because each weakness is also a strength. Find out how to create outrageous personal and professional success by amplifying flaws, instead of denying them.

Monday, April 24 – 8:00 to 9:30 am - Monday Morning General Session & Keynote (70 CPE Minutes)

8:00 – 8:20 am

ITA's Leadership Alliance (ILA) Graduation – Class of 2023

Room: Parq Grand D/E

Shawn Slavin – ITA President, Owasso, OK

ITA President Shawn Slavin will present the 2022-23 Class of the ITA's Leadership Alliance (ILA) with their graduation certificates.

8:20 – 8:30 am

Special ITA Presentation

Room: Parq Grand D/E

Lissa Johnsen - ITA Vice President, Raleigh, NC

David Hirschhorn - Eide Bailly LLP, Fargo, ND

Kent L. Hollrah – Sage, Flower Mound, TX

Join us to help celebrate Shawn Slavin's contributions to ITA!

8:30 – 9:30 am (70 CPE Minutes)

KEYNOTE: Three Keys To Always Get What You Pay For

Room: Parq Grand D/E

Mike Scott – President and Founder - Totally Accountable Systems (TAS)

This keynote talk is designed to give you the proactive approach to ensure you constantly create the highest levels of accountability. Accountability creates money. Accountability means less stress. Non accountability loses money. It's always your choice to get what you want. Come to this fun keynote by Mike Scott and leave with renewed purpose and drive. You will see immediate results.

Deep Dive Workshops

Monday, April 24 - 10:00 am to 3:15 pm (with lunch from Noon to 1:15) – (240 CPE Minutes)

Workshop 1

The Tale Of Two Hybrids: Building A Performance-driven Post-Pandemic Workplace

Room: Parq Grand D

Speaker: Jody Thompson – CultureRx®, Mound, MN

Assisting: Elliot Kohl – CultureRx®, Mound, MN

During this workshop, Jody Thompson, CEO of CultureRx and creator of The Result-Only Work Environment, will weave together stories, case studies, and social science research creating a fascinating look at the difference between a policy-driven hybrid work environment versus a performance-driven hybrid work culture and how the two hybrid models impact your organization. She will reveal a true solution to this time sensitive issue, address false assumptions and common misgivings about why a true solution will not work at a particular organization, and use valid and reliable data to explain why a true solution is the best approach. A true solution addresses leadership, strategy, customers, workforce, and operations leading to results. In this workshop you will learn:

- The false assumptions people make about the impact of hybrid work.
- The differences between a policy-driven versus a performance-driven hybrid model
- How to use the valid and reliable data available to guide your work redesign decisions
- What really works, what the true solution is based on data
- Common assumptions about why a true solution won't work at an organization.
- Why the true solution is the best approach for achieving workforce excellence
- The successful pathway that leads to a subscription-based business model
- What you can do right now to begin making sustainable and lasting change in the idea of the workplace and truly unleash the power of your workforce

This workshop is interactive. Get ready to roll up your sleeves, have fun, and exclaim 'wow! I never thought of it this way!'

Workshop 2

How To Get Exactly What You're Paying For - Accountability Pays Off!

Room: Parq Grand B/C

Mike Scott – President and Founder - Totally Accountable Systems (TAS)

You pay for 100% accountability every payday. But do you get 100% accountability from your team? Attend this workshop and get seven immediately applicable techniques to get higher results. This workshop will show you exactly how to raise the level of accountability in your organization immediately. You will learn from the accountability expert - Mike Scott. You will have fun and you will use at least two of these ideas the same day.

Workshop 3 - CAS

Shaping The Future Of CAS Together

Room: Parq Grand E

Facilitators:

Matthew West – Bergan/KDV, Brighton, MI

Jenni Huotari – Eide Bailly LLP, Fargo, ND

John Yeager – Whitley Penn, Dallas, TX

Jennifer Witts – CLA, Oak Brook, IL

Speakers:

Part 1: *Brian Champ – Sage, Peachtree City, GA*

Part 1: *Ashleigh Sutter – Intuit, Greenville, SC*

Part 2: *Rebecca Munson – Lurie LLP, Minneapolis, MN*

Part 2: *Dixie McCurley - Cherry Bekaert Advisory LLC, Atlanta, GA*

Part 2: *Todd Cooper – CPA.com / AICPA, New York, NY*

Part 3: *Glenn Dunlap - Peerview Data, Indianapolis, IN*

CAS's double digit growth trend since 2018 means that for many firms, CAS practices will eclipse assurance and tax service lines in terms of total revenue in the next 5-10 years. This shift in service line mix will have profound impacts on the industry in terms of business models, go to market strategies, talent and staffing, AI and technology tools, and client delivery models. Parallel to the changes this shift in service lines are causing are global trends disrupting the accounting industry as a whole. As leaders in CAS at this pivotal moment, we have the opportunity to capitalize on this shift to CAS and these global trends to work together to shape the future of CAS in 2030. In this session we will:

- Provide insights to the way small and mid-sized businesses will operate in the future and their resulting CAS needs
- Discuss trends related to private equity and the labor market and how these trends may impact the partnership model
- Learn relevant and CAS specific technology and automation including topics such as data factory, FP&A, data analytics, and blockchain

ITL Workshop – CIO Academy

Building Stakeholder Relationships

(NOTE: Session ONLY For ITL CIOs OR Their Designee - 1 per Firm)

Room: Parq Grand A

Larry Bonfante - CIO Bench Coach, LLC, Nyack, NY

Relationships are the cornerstone of driving results. Establishing trust, enhancing your brand, identifying, and leveraging diverse social styles requires commitment and practice. Through the delivery of practical leadership skills, best practices and team activities ("leaders as learners") this workshop proves that success is a team sport and building relationships can be broken down into identifiable steps. Join Larry for an engaging and fun experience that will give you the necessary tools to improve your stakeholder relationships and drive richer business results.

Concurrent Sessions – By Date and Time

Monday, April 24 – 3:30 to 5:00 pm - (90 CPE Minutes)

CR-1

ITA Speed Dating – Ignite On Steroids

Room: Parq Grand D

Facilitators:

Ayala Clinkman – Business Technology Partners, LLP, Deerfield, IL

Moirra Goggin – DSD Business Systems, Long Beach, CA

Get to know your fellow ITA members better in this high energy session consisting of three lightening rounds that will take on a variety of timely and relevant topics in a round table format. Get to know some ITA members you have not met before and collaborate together to discuss real challenges and identify potential solutions to be shared with the entire group. Similar to our popular Ignited sessions, you will 90 seconds to get your best ideas on the table. We will share the best of the best after the conference. Discussion topics will include the following:

- Marketing strategies
- Customer experience
- Subscription services
- Working with publishers
- Remote workforce
- Service and product offerings
- Workforce productivity
- One or two surprise topics

CR-2

The Worst Demo I Ever Did: Key Learnings from Our Lowest Moments

Room: Stanley

Facilitator:

Jeremy Potoka – Presales Leader LLC, Lancaster, PA

Speakers:

Seth Fike – Scanco Software, LLC, Nokomis, FL

Misty Palek – Palek Consulting, Slater, IA

Mike Duberstein – Presales Leader LLC, Lancaster, PA

Joe Santoro – SWK Technologies, Inc., Phoenix, AZ

We've all been on the receiving end of a bad software demonstration. If we are brutally honest with ourselves, many of us have also given a bad demonstration to a potential client. In this session, four expert presales panelists will kick off the conversation by sharing their worst demonstration experiences and highlight their biggest takeaways from these low points. Next, all attendees will share from their own experiences in lively roundtable conversations, swapping stories and learning from one another's demonstration mishaps. The intent of this session is to identify common threads as a group and share strategies that will help us to never repeat those mistakes again, such as:

- Poor discovery
- Lack of qualification
- Miscommunication among presenters
- Solution misalignment
- The list goes on.....

Delivering a good demonstration doesn't happen by accident. Join us to share your story!

CAS

Going From “Good” To “Great”: Upskilling And Future-Proofing The Team

Room: Parq Grand E

Facilitators:

Jessica E. Barnas – Wipfli LLP, Aurora, IL

Nina Chmura – Withum, Princeton, NJ

Kristin Henry – CPA.com / AICPA, Durham, NC

Employees are eager to deliver advisory services to your clients, but they may be unsure of how to do so in the evolving landscape of CAS 2.0. How do we help bridge their knowledge gaps and enable them for success? How can you get your managers acting like controllers and your senior managers acting as CFO's? In this session, we will:

- Discover the CAS 2.0 curriculum from a CPA.com representative.
- Discuss alignment of titles and skill sets within your org chart and your ideal client profile.
- Identify ways to upskill your staff's skill sets.
- Learn how to align staff with the highest and best use of their skill sets

ITL-T

ITL Tactical Roundtables

Room: Parq Grand B/C

The ever-popular ITL Tactical Roundtables for this Spring 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!

- **Infrastructure / Engineering:** *David Franks – BDO USA, LLP, Kentwood, MI*
- **Application Development:** *Adam Zouak – MNP LLP, Calgary, AB, Canada*
- **Project Management:** *Participant-Led*
- **Security / Compliance:** *Zaid Dahleh – MNP LLP, Calgary, AB, Canada*
- **Support Desk / Service:** *Nick Bessinger – BDO USA, LLP, Grand Rapids, MI*

ITL-S

ITL Strategic Roundtables

Room: Parq Grand A

Paul Blowers – Plante Moran, Southfield, MI

Strategic Roundtables: IT leader discussion on pressing topics and carry-over discussion from the day's prior sessions.

Monday, April 24 – 5:00 to 6:00 pm - (60 CPE Minutes) – With Beverage Service

CAS & CIO ITL

CAS & CIO/ITL Collaboration: Is IT Really A Pain In The CAS?

Room: Parq Grand E

John A. Fleischer – CBIZ, Inc., Independence, OH

Gregg Landers - CBIZ MHM, LLC, San Diego, CA

Rebecca Munson – Lurie LLP, Minneapolis, MN

Michael Pynch – Wipfli LLP, Eau Claire, WI

Join us for our first-ever combined CAS and IT Leader joint session. Our objective is to create awareness between CAS and IT leaders in Accounting Firms around specific challenges each group faces in creating a successful collaborative relationship. In this session attendees can expect to:

- Understand the vision that CAS leaders have for growing and operating a successful CAS practice now and in the future.
- Learn from IT leaders about how evolving firm governance structures, advancing technologies, and increasing risks could impact the growth of a CAS practice.
- Gain insight on how IT and CAS leaders can work more effectively together.
- Don't miss this opportunity to build relationships and collaborate with other leaders and peers on how to help your CAS practice succeed.

Tuesday, April 25 – 8:00 to 9:15 am - (75 CPE Minutes)

CR-1

Can CAS And CR Be Friends? What Is CAS And Do We Want It?

Room: Parq Grand D

Facilitators:

Ayala Clinkman – Business Technology Partners, LLP, Deerfield, IL

Bret Romney – Ascend Strategies, Inc., Montana City, MT

Panelists:

Jessica E. Barnas – Wipfli LLP, Aurora, IL

Jenni Huotari – Eide Bailly LLP, Fargo, ND

Daniel Moses – PwC Private, Pittsburgh, PA

Scott Schimberg – Armanino LLP, San Ramon, CA

Jacqueline Tiso – JMT Consulting Group, Inc., Mount Juliet, TN

CAS, or Client Accounting Services is a big buzz word in the Consulting and Resellers (CR) world but what is it and does it belong in it? Whether you are already working on adding “CAS-like” services to your offering, have added some, or thinking if you even should, this session should provide you with valuable insight and ideas. In this session we will review:

- What does CAS mean?
- What does a CAS practice do and how?
- What is the difference between CAS and CR?
- How and where does it fit in with a CR firm?
- What CAS-like services should a CR firm offer, which it shouldn't, and why
- What are the technology considerations when developing a CAS practice?
- What are the possible revenue models of a CAS practice?

We will hear about challenges and successes from firms who have added a CAS practice to their offerings. Attendees will be able to ask questions and share their experiences as well.

CR-2

Publisher And VAR Panel: Two Sides Of The Same Coin

Room: Stanley

Facilitator:

Sean DeMuro - GRF CPAs & Advisors, Bethesda, MD

Panelist:

Debra Ellis – Ellis Partners, Chappaqua, NY

Angie Kontenakos – Acumatica, Reston, VA

Theresa Putzier – Celigo, Roseville, MN

Lou Sassano – SYSPRO USA, Tustin, CA

What do VARs expect from publishers? What do publishers expect from VARs? Sometimes it is hard to know when you only see one side of the equation when ultimately, the goal to provide your clients the best possible experience is the same. Enhance your clients experience and join our panel as we hear from both sides to discuss Industry Changes and Expectations in:

- Marketing & Name Awareness
- Lead Generation, Demos, & Sales Process
- Implementation & Support

CAS

Offshoring Strategies & Realities

Room: Parq Grand E

Jessica E. Barnas – Wipfli LLP, Aurora, IL

Deneen Dias – Botkeeper, Boston, MA

Gretchen G. Naso - RKL Virtual Management Solutions, LLC, Wyomissing, PA

Offshoring can be an effective strategy to CAS practices looking to scale and increase margin. However, offshoring can be a daunting proposition for those who are new to this! In this session we will hear from three practitioners who each employ a different “version” of offshoring. Join us for an interactive panel discussion as we explore their strategies and the realities embedded in this approach to staffing. Learning objectives include:

- Gain insight into the various offshoring alternatives and how to scale with each approach.
- Hear panelists’ experiences in getting started with offshoring.
- Learn how to set up an offshoring office.
- Learn what to consider when selecting a contractor.
- Learn best practices related to technology and security concerns.
- Develop an understanding of the challenges facing organizations of all sizes (small practice, large firm, outsourced provider).
- Gain awareness of best practices for offshoring.

ITL – T

Unleashing The Power Of Low Code: Overcoming Challenges And Celebrating Successes

Room: Parq Grand B/C

Facilitator:

Elena Truelove – MNP LLP, Calgary, AB, Canada

Panelists:

Julian Benjamin – Marcum LLP, Melville, NY

Danielle Gallo – CohnReznick, Roseland, NJ

Jim Sauerbrei – Wipfli LLP, Aurora, IL

Low Code/No Code tools, including the Power Platform from Microsoft, enable organizations to build custom applications and automate business processes using low-code development techniques. While low-code has made it easier for citizen developers to build solutions, it also presents a unique set of challenges that can hinder the success of these initiatives. In this session, the panel will share their experiences and provide valuable insights into their journey in leveraging these types of tools for low-code development.

Learning Objectives:

- Learn from other firms' real-world experiences with low-code development
- Identify common challenges faced by firms when building low-code solutions
- Learn strategies for overcoming these challenges and ensuring success.
- Understand best practices for leveraging low code tools to drive business outcomes
- Discover features and capabilities that can be used to enhance your solutions and drive business value

Whether you're beginning evaluation of low code tools, using the tools like Power Platform within IT only, or fully embracing true citizen development, this panel discussion will provide valuable insights, best practices and strategies for leveraging the Power Platform and other tools to build effective low-code solutions that drive business outcomes

ITL-S

Out Of The Box: A Panel On Crafting Innovation COEs For Accounting Firms

Room: Parq Grand A

Facilitator:

Zac Charnecki – Wipfli LLP, Minneapolis, MN

Panelists:

John A. Fleischer – CBIZ, Inc., Independence, OH

Peter J. Scavuzzo – Marcum LLP, New York, NY

JD Stotts – Whitley Penn, Fort Worth, TX

Join us for a dynamic and thought-provoking panel discussion as experts explore the future of the accounting industry, the critical role that innovation plays in driving growth, and share their personal insights on how to establish a successful and sustainable Innovation COE. In this session, attendees can expect to:

- Understand the significance of innovation in the accounting industry.
- Learn from innovation experts their experiences in driving innovation within accounting firms.
- Gain insights into the key components and best practices you can apply to develop, or improve, your Innovation COE.

Don't miss this opportunity to hear from industry leaders, network with peers, and gain actionable insights on how to drive innovation in your own organization.

Tuesday, April 25 – 9:30 to 10:45 am - (75 CPE Minutes)

CR-1

Top-Performing Partners Reveal KPIs That Deliver Growth

Room: Parq Grand D

Todd Fitzwater - Kimberlite Partners, LLC, San Jose, CA

What are the keys to running and scaling a successful consulting practice (VAR)? We'll cover the approaches and measurements top-performing partners use to achieve their goals. You'll walk away with specific metrics and tactics to use in your own practice that will help increase practice value and identify where you should invest next.

CR-2

Securing Tomorrow's ERP Channel Talent: 4 Questions for 4 ERP Leaders from Avalara, Odoo, NetSuite (Neo3) & Acumatica (PC Bennett Solutions)

Room: Stanley

Facilitator:

Julian Schrenzel - DyNexus Recruiting & Staffing, Seattle, WA

Panelist:

Melissa Craig – Avalara, Atlanta, GA

Wilfried Juncker – Odoo, San Francisco, CA

Tim O'Sullivan – PC Bennett Solutions, North Bend, WA

Jim Rosenberg – NEO 3, LLC, New Middletown, OH

There is a BIG PROBLEM in the Mid-Market ERP industry, and we all know it. Every single one of us suffer from it from time to time, and some on a DAILY BASIS. It costs some ERP resellers hundreds of thousands of dollars in lost revenue. It can turn friendly competitors into bitter rivals, and can even bring a company to complete ruin. We're talking about TALENT. Everybody needs it, yet few (if any?) have cracked the talent code and have been able to hire the people they need, when they need them.

Some ERP publishers are increasingly taking a proactive approach to helping their channel partners find, source, educate and otherwise 'create' the workforce of tomorrow for their channel partners. This workshop is an AUDIENCE-INTERACTIVE panel discussion featuring two leading ERP publisher channel executives from ODOO and AVALARA, Two senior NETSUITE and ACUMATICA partner executives from NEO3 and PC BENNETT SOLUTIONS, and YOU (the participating audience!) Join us as we talk about the evolving role that both publishers and partners play in enabling the mid-market ERP workforce of tomorrow, and what these world-class organizations are doing today to eliminate the age-old talent supply/demand challenge.

CAS

How To Maximize Your Vendor Relationships

Room: Parq Grand E

Facilitators:

Matthew West – BerganKDV, Dexter, MI

John Yeager – Whitley Penn, Dallas, TX

Panelists:

Liz Bennett – Dayshape, Cato, NY

- Learn how to successfully navigate your vendor relationships with actions items on co marketing initiatives, internal firm advisory, creating technology roadmap and mining of resources.
- Discuss real life examples related to firm's scalability, change management, risk, talent shortage and ways your vendor can help provide solutions beyond an MSA.
- Hear firsthand vendor relationship strategies to apply to new and existing relationships.

ITL-T

Intelligent Automation: Evolving Techniques, Practical Use & Case Studies

(NOTE: Session ONLY for ITL Members)

Room: Parq Grand B/C

Julian Benjamin – Marcum LLP, Melville, NY

Rob Drover – Marcum LLP, Philadelphia, PA

Peter J. Scavuzzo – Marcum LLP, New York, NY

This session will cover a 5-year journey to build both an internal Center of Excellence and a client-facing, Intelligent automation Practice. It will cover practical and successful implementation of Intelligent Automation in the Accounting industry as well as automation techniques that were employed across other industries and clients with real world case studies. The presentation will cover the following key areas:

- Current State of Platform Options
- Evolution of Intelligent Automation
- The intersection of Application Development into the Intelligent Automation Platform
- Practical Case Studies within Accounting
- Real World Cross Industry Case Studies

ITL – S

Supporting Firm Growth Through Offshore Resource Centers

Room: Parq Grand A

Facilitator:

Russ Ahlers – BDO USA, LLP, Grand Rapids, MI

Panelists:

Paul Blowers – Plante Moran, Southfield, MI

Amel Edmond - WithumSmith+Brown, Red Bank, NJ

JD Stotts – Whitley Penn, Fort Worth, TX

Offshore resource centers present a great opportunity for business leaders to find resources at a price point that supports future growth strategies. However, offshore resource centers do come with a set of unique challenges that you need to be prepared to overcome, including but not limited to time zones, communication, ownership, infrastructure, and team management.

Join us to learn how these firms used an offshore resource center to support their firm's growth strategy and how they dealt with growth pains.

CR-1

Learn The Art Of Storytelling To Accelerate Engagement And Conversions

Room: Parq Grand A

Facilitator/Speaker:

Jon Rivers – Marketeery, Tampa, FL

Speaker:

Cheryl Salazar – The Partner Marketing Group, Canton, MI

Did you know that stories are remembered 22x more than facts? (Stanford Graduate School of Business study). Storytelling is essential in marketing—especially technology marketing. People respond well to stories – both in terms of engagement and memorability. Stories can also make it easier to grasp complex concepts. Join this workshop to learn how to tell compelling stories around your solutions.

Agenda

- The power of stories for B2B marketing.
- What types of stories should you tell?
- How to write compelling stories.
- Real-world examples of storytelling and where to use them.
- We'll guide you as you try your hand at it.

CR-2

Effective Communication - What Not To Say, When Not To Say It

Room: Stanley

Facilitator:

Joshua Bone – SCS Cloud, Minneapolis, MN

Fireside Guests:

Sean Barnes – WSS Solutions, The Woodlands, TX

Steve Parrott – Praesto Consulting, San Diego, CA

Join us for a fireside chat between two individuals as they discuss some communication challenges in the path to becoming great. Learn how poor communication and negative time are a detriment to your practice and those you serve inside and outside of your organization; resulting in an impact on owning your Core Values. Collaborate with the speakers and other ITA colleagues during this informative and thought-provoking session!

CAS

BPO - A Different Approach In Offering CAS

Room: Parq Grand E

Facilitators:

Matthew West – BerganKDV, Dexter, MI

Jennifer Witts – CLA, Oak Brook, IL

Panelists:

Brian Champ – Sage, Peachtree City, GA

Dixie McCurley - Cherry Bekaert Advisory LLC, Atlanta, GA

Kane Polakoff – CohnReznick, Farmington Hill, MI

The numbers are in, and CAS offerings are quickly emerging as the front runner in growth, NCE, profitability and sustainability. Firms offering CAS services must navigate interesting firm scenarios that pose challenges when growing a CAS practice. BPO firms are unencumbered by issues such as independence, legacy technology, siloed resources and other issues experienced in a traditional full services firm. In this session we look to explore and educate on best practices learned in a BPO firm, discuss differences and if it might even make sense to spin a CAS practice off as its own BPO. Learning Objectives:

- Discover the advantage BPO firms have over traditional firms, when offering CAS.
- Learn many best practices from market segmentation, channel verticals, CAS specific technology choices and other experiences propelling success in the BPO market.
- Gain insight on how to evolve and layer in new CAS services that normally would be challenging outside a BPO practice.
- Discuss and understand the benefits of collaboration with a BPO firm.

ITL-T

Taking The Slop Out Of Cloud Sloperations

Room: Parq Grand B/C

Moderator:

Nicholas Schweitzer – Wipfli LLP, Wauwatosa, WI

Panelists:

Felipe Fernandes – BDO USA, LLP, Grand Rapids, MI

John Hubert – Wipfli LLP, Milwaukee, WI

Steve Kurutz – Plante Moran, Denver, CO

As modern infrastructure moves more and more into the cloud, developing, deploying, maintaining, and monitoring these assets present new challenges, as well as new techniques to handle them. In this session, we will have a discussion around three primary pillars of modern cloud operations in order to help you create predictable and reliable cloud systems:

- Cloud Governance: How to handle policies, cost estimation, administration and management rights, as well as proper segregation of duties
- Development Lifecycle: Infrastructure as code, DevOps management, code reviews, deployment pipelines, and modularization
- Cloud Monitoring: Security monitoring, environment drift, downtime monitoring, as well as cost monitoring and control

ITL-S

CIO 437: Advanced Cyber-Insurance Numismatics & VCR Repair

Room: Parq Grand A

Joseph Brunsman – Brunsman Advisory Group, Arnold, MD

Did you know there are over 300 different cyber insurance policies? Or that insurance companies have denied data breach claims for misrepresentation, which can prevent future cyber coverage? Please join us for an in-depth analysis into the dynamic world of cyber-insurance policies for CPA practices. Joseph Brunsman, a leading accounting industry insurance consultant and author, will present crucial information about the cyber insurance application process (including recommended coverage options and amounts), policy exclusions, ever-increasing premiums (should you self-insure?), and internal controls to mitigate shortfalls. Time permitting, we will also explore the inner workings of a 1987 Sony Betamax...

Tuesday, April 25 – 1:30 – 3:00 pm - (90 CPE Minutes)

CR-ALL

Personal And Company Branding – It Really Does Matter, More Than You Might Think

Room: Parq Grand D

Facilitator:

Bret Romney – Ascend Strategies, Inc., Montana City, MT

Panelists:

Scott Hollrah – Venn Technology, Grapevine, TX

Jon Rivers – Marketeery, Tampa, FL

In this session you will learn:

- What good individual and company branding looks like and how to achieve it
- How good branding builds loyalty and an emotional connection with clients and employees
- How good branding attracts new clients and speeds up the sales cycle.
- How good branding shrinks the pool of competitors for both prospects, existing clients and potential superstar employees

CAS

Getting It Done With Team And Tech

Room: Parq Grand E

Nina Chmura – Withum, Princeton, NJ

Linda Lutsic – Rehmann, Farmington Hills, MI

Rebecca Munson – Lurie LLP, Minneapolis, MN

As your client accounting services team grows managing workflow, projects, capacity planning becomes increasingly more important to ensure quality of service and more difficult to assess. During this session participants will learn:

- Why managing workflow, capacity planning and automation are important to the client experience.
- How other firms are tackling these issues, including what software they are using and the pros and cons of the various software solutions.
- How to evaluate your current teams' skills and identify needs to position the team for future growth.
- Learn how others are using Bots to tackle this and other problems facing their teams.

ITL-T

ITL Tactical Roundtables

Room: Parq Grand B/C

The ever-popular ITL Tactical Roundtables for this Spring 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!

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- **Infrastructure / Engineering:** *David Franks – BDO USA, LLP, Kentwood, MI*
- **Application Development:** *Adam Zouak – MNP LLP, Calgary, AB, Canada*
- **Project Management:** *Participant Led*
- **Security / Compliance:** *Zaid Dahleh – MNP LLP, Calgary, AB, Canada*
- **Support Desk / Service:** *Nick Bessinger – BDO USA, LLP, Grand Rapids, MI*

ITL-S

ITL Strategic Roundtables

Room: Parq Grand A

Joseph Brunsman – Brunsman Advisory Group, Arnold, MD

Chris Morrow – Warren Averett, Birmingham, AL

ITL leader discussion on pressing topics and carry-over discussion from the day's prior sessions.

Tuesday, April 25 – 3:00 to 3:15 pm

Wrap Up Sessions & Adjournment Of The ITA Spring Collaborative

CR

Room: Parq Grand D

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

CAS

Room: Parq Grand E

Facilitators: *Kimberly Austin – Avalara, Palm Springs, CA*

Kane Polakoff – CohnReznick, Farmington Hill, MI

Irfan Dossani – Whitley Penn, Dallas, TX

ITL

Room: Parq Grand B/C

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



NASBA Registry Information

Credit Hours: Up to 17 hours of CPE available. Basis: 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 tracks of educational content: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and perhaps others. 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

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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.