



July 23-25, 2023  
The Madison Concourse Hotel  
Madison, Wisconsin

INFORMATION TECHNOLOGY ALLIANCE

# Internal Tech Leaders

## SUMMER MEETING

Sunday, July 23			
12:30 PM	4:00 PM	On Your Own Time - Local Activities	
4:00 PM	9:00 PM	Badge Pickup - Registration Desk - TBD	
5:00 PM	9:00 PM	Opening Reception and Dinner Party - TBD	
Monday, July 24			
		STRATEGIC TRACK	TACTICAL TRACK
7:00 AM	8:00 AM	Breakfast	
8:00 AM	8:10 AM	Welcome And Agenda Review <i>Shawn Slavin, ITA President</i>	
8:10 AM	9:30 AM	Host Firm Welcome And Executive Presentation <i>Allen Smith, CIO and Christine Dahlhauser, Managing Partner, Wisconsin - Baker Tilly</i>	
9:30 AM	10:00 AM	Break	
10:00 AM	11:30 AM	ChatGPT – Is Your Firm Ready?	
11:30 AM	12:30 PM	Lunch	
12:30 PM	1:45 PM	Governance And AI - Adopting And Reviewing The Risks	It's Not Easy Being Green – ESG And IT
1:45 PM	2:00 PM	Break	
2:00 PM	3:15 PM	You Can't Spell AICPA Without AI	Implementing Governance And AI
3:15 PM	3:30 PM	Break	
3:30 PM	4:45 PM	Strategic Roundtables Metrics Madness: The Good, The Bad, And The Ugly Of CIO Data Submission	Tactical Roundtables
6:00 PM	8:30 PM	Monday Night Dinner and Social Event - TBD	
Tuesday, July 25			
		STRATEGIC TRACK	TACTICAL TRACK
7:30 AM	8:30 AM	Breakfast	
8:30 AM	10:00 AM	Academic Perspective On AI And Its Role In Accounting	AI Deployment Smackdown: Internal vs. External
10:00 AM	10:30 AM	Break	
10:30 AM	12:00 PM	ITUnlocking The Mysteries Of Managing New Technology Adoption	Prompt Engineering - Ask Me No Questions And I'll Tell You No Lies
12:00 PM	1:15 PM	Lunch	
1:15 PM	2:45 PM	Innovation Comes In All Shapes And Sizes	Where Does Innovation Begin In Your Firm
2:45 PM	3:00 PM	Break	
3:00 PM	4:30 PM	Strategic Roundtable: How Risky Is Your Business (Partner) – Managing Third Party Risk	Tactical Roundtables
4:30 PM	4:45 PM	Closing Discussion And Adjourn <i>Shawn Slavin, ITA President</i>	
6:00 PM	8:30 PM	Optional Meet Up For Members Staying Until Wednesday - TBD	



**Monday, July 24**

**8:00 – 9:30am**

**Track - All CPE – 80 min.**

**Room:**

### **Welcome and Agenda Review**

*Shawn Slavin – ITA President, Owasso, OK*

ITA President Shawn Slavin will introduce our Summer ITL Meeting Committees and welcome everyone. He will also provide an overview of the Summer ITL Meeting agenda prior to introducing our Sunday Host Firm.

### **Host Firm Welcome and Executive Presentation**

*Allen Smith (CIO) and Christine Dahlhauser, Managing Partner, Wisconsin - Baker Tilly*

**10:00 – 11:30am**

**Track – All CPE – 90 min.**

**Room:**

### **ChatGPT – Is Your Firm Ready?**

ChatGPT is “scary good”: think internet-level disruption. It has been labeled as the fastest growing app of all time according to analysts. Individuals and industries are leveraging the technology for everything from composing emails, to writing code, to solving complex problems. It’s free and it’s easy, but is it good for your firm? In this panel session we will hear from firms that have begun their journey into the ChatGPT world. We will discuss where they are in their journey, if they have experienced the successes they hoped for, lessons learned, and if they have been brave enough to use it in their production environment.

**12:30 – 1:45pm**

**Track – Strategic CPE – 75 min.**

**Room:**

### **Governance And AI - Adopting And Reviewing The Risks**

As more ITA firms move to platforms like Workday and away from more traditional siloed systems (HRIS, ERP, etc) the community is really waking up to the value in this type of transition. While on the surface, this transition might seem incredibly expensive. However, the firms that have made the transition are reporting new efficiencies and a better employee experience through native integration. This panel will focus on firms at various stages of the transition to PSA platforms, from the RFP process to the implementation.

**12:30 – 1:45pm**

**Track – Tactical CPE – 75 min.**

**Room:**

### **It's Not Easy Being Green – ESG And IT**

In this panel discussion, we will explore the ESG (Environment, Social, Governance) framework and how technology teams are playing an even more important role in helping firms meet their sustainability objectives. The panel will discuss how their teams are engaged in ESG activities internally and as part of their firms' broader sustainability programs. They will share insights on the types of questions they are being asked from clients as part of vendor due diligence or as part of ESG disclosures. By the end of this session, you will have a greater understanding of why ESG is important to sustained firm growth and the ways that IT can help enable sustainability success.

**2:00 – 3:15pm**

**Track – Strategic CPE – 75 min.**

**Room:**

### **You Can't Spell AICPA Without AI**

Artificial Intelligence has the power to disrupt our industry while humanity grapples with some of the challenges it brings. We'll hear from the AICPA to understand the impact on attestation in a world where ChatGPT, machine learning, and massive data lakes approach the traditional 'opinion' rendered by humans. We'll discuss the changing role of accountants in this AI-powered world and how the AICPA is adopting new standards, tools, and training methods to keep us relevant.

Learning objectives:

- What is the current state of AI-powered deliverables?
- What risk considerations should be top of mind for firms as they consider AI-powered tools?
- What can firms do to update their training and education to prepare for AI?

**2:00 – 3:15pm**

**Track – Tactical CPE – 75 min.**

**Room:**

## **Implementing Governance And AI**

**3:30 – 4:45pm**

**Track – Strategic CPE – 75 min.**

**Room:**

## **Strategic Roundtables**

### **Metrics Madness: The Good, The Bad, And The Ugly Of CIO Data Submission**

In this session, we will review the metrics submitted by members with some general observations on trends and anomalies. During the roundtable sessions we will discuss:

- Best practices for collecting, analyzing, and presenting data.
- The importance of metrics in informing business decisions and driving organizational success, as well as the challenges and pitfalls that can arise when collecting and analyzing data.
- Experience on how to ensure data accuracy, avoid common mistakes, and effectively communicate metrics to key stakeholders.

By the end of the session, participants will have gained a deeper understanding of the value and importance of metrics, as well as practical strategies for improving the quality and reliability of their own data. Join us for a thought-provoking and informative session that will help you leverage metrics to make more informed and effective decisions.

**3:30 – 4:45pm**

**Track – Tactical CPE – 75 min.**

**Room:**

## **Tactical Roundtables**

The ever-popular ITL Tactical Roundtables for this Summer 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!

**Table Leaders:**

*Infrastructure:*

*Service Delivery, Metrics and Support:*

*Security/Compliance:*

**8:30 – 10:00am**

**Track – Strategic CPE – 90 min.**

**Room:**

### **Academic Perspective On AI And Its Role In Accounting**

Hear the perspectives from two academic leaders from the University of Wisconsin – Madison. In this session, we will hear these academic leader's thoughts and possible impacts of AI in the accounting industry. Questions that will be answered include current impact on curriculum, what are students using today as resources, where innovation in the industry is leading, and the impact on overall enrollment in accounting. Disclosure: This description was created by a human being.

**8:30 – 10:00am**

**Track – Tactical CPE – 90 min.**

**Room:**

### **AI Deployment Smackdown: Internal vs. External**

In this panel discussion, we will explore the differences between deploying AI for internal use versus leveraging it for client services, marketing, and other customer-facing interactions. Our panelists will discuss the unique challenges and opportunities of each approach and share their insights on how organizations can best navigate this decision. They will also examine the practical considerations involved in deploying AI, including data privacy, security, and ethical concerns. By the end of the session, participants will have a better understanding of the benefits and risks of deploying AI internally and externally, as well as practical strategies for ensuring success in either scenario. Join us for an informative and thought-provoking discussion that will help you make informed decisions about deploying AI in your organization.

**10:30am - Noon**

**Track – Strategic CPE – 90 min.**

**Room:**

### **ITUnlocking The Mysteries Of Managing New Technology Adoption**

During this session, you will learn practical strategies for managing the new technology adoption process in a way that's efficient, effective, and painless. We'll cover topics such as how to evaluate new technology, how to train your team on new systems, and how to troubleshoot common problems that arise during the adoption process. With our expert guidance, you'll be able to stay ahead of the curve and ensure that your business stays relevant in the digital age. Don't miss this opportunity to master the art of technology adoption and take your business to the next level!

**10:30am - Noon**

**Track – Tactical CPE – 90 min.**

**Room:**

### **Prompt Engineering - Ask Me No Questions And I'll Tell You No Lies**

In this panel discussion, we will explore the emerging importance of prompt engineering for AI. Our panelists will discuss what prompt engineering is and whether it is really an important new skillset or just more fodder for the AI hype cycle. We will discuss whether firms are looking at this skillset as part of their core technology teams, for their citizen technologists, or their entire firms. Join us for an informative and thought-provoking discussion that will help you make informed decisions about one of the hottest topics and fastest growing roles to consider as you leverage AI in your organization.

**1:15 – 2:45pm**

**Track – Strategic CPE – 90 min.**

**Room:**

### **Innovation Comes In All Shapes And Sizes**

**1:15 – 2:45pm**

**Track – Tactical CPE – 90 min.**

**Room:**

### **Where Does Innovation Begin In Your Firm**

**3:00 – 4:30**

**Track – Strategic CPE – 90 min.**

**Room:**

### **Strategic Roundtables**

#### **How Risky Is Your Business (Partner) – Managing Third Party Risk**

Legal and Compliance leaders named third party risk as a top threat to their organizations. In fact, per Gartner, 83% of executives have stated that third party risks were identified after initial onboarding and due diligence. As these external partnerships become increasingly complex, the need for a new vendor risk management approach is clear. The rapidly changing business environment demands new approaches to third party risk management that account for the new ways that organizations rely on third parties to advance business goals.

In this roundtable session we will discuss how firms are addressing items like:

- Vendor Risk Management (VRM) framework (IT and/or Enterprise based)
- Identification and prioritization of risk
- Ensuring/Enforcing vendor compliance to your firms' risk appetite
- What do you do when a vendor won't comply

**3:00 – 4:30pm**

**Track – Tactical CPE – 90 min.**

**Room:**

### **Tactical Roundtables**

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**Table Leaders:**

*Infrastructure:*

*Service Delivery, Metrics and Support:*

*Security/Compliance:*

**4:30 – 4:45pm**

**Track – All**

**Room:**

#### **Closing Discussion and Adjourn**

*Shawn Slavin – ITA President, Owasso, OK*



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## **Internal Tech Leaders** SUMMER MEETING

### **NASBA Registry Information**

**Credit Hours:** Up to 15 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: Internal IT for large CPA Firms and Technology Product, Support and Service Updates/Discussions. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member firms 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](http://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 57605 , Telephone (480) 515-2003.