INFORMATION TECHNOLOGY ALLIANCE

Internal Tech Leaders
SUMMER MEETING

July 28-30, 2024
Park Place Hotel & Conference Center
Traverse City, MI

Sunday, July 28

12:30 PM	4:00 PM	**On Your Own Time - Local Activities**
4:00 PM	9:00 PM	**Badge Pickup - Registration Desk** Grandview Foyer
5:00 PM	9:00 PM	**Opening Reception and Dinner Party** Top of the Park (10th floor)

Monday, July 29

		STRATEGIC TRACK Boardman Room	TACTICAL TRACK Grandview 1
7:00 AM	8:00 AM	**Breakfast - Grandview 2**	
8:00 AM	8:10 AM	**Welcome and Opening - Grandview 1** **Geni Whitehouse, ITA President**	
8:10 AM	9:30 AM	**Host Firm Welcome And Executive Presentation** **Rehmann - Grandview 1**	
9:30 AM	10:00 AM	**Break**	
10:00 AM	11:30 AM	**Developing A Great IT Culture**	**Elevating The Associate Onboarding Experience: A Blend OfAutomation And Personalization**
11:30 AM	12:30 PM	**Lunch - Grandview 2**	
12:30 PM	1:45 PM	**Change Is The Only Constant**	**Digital Employee Experience: Sync For Success**
1:45PM	2:00 PM	**Break**	
2:00 PM	3:15 PM	**Strategic Roundtable Discussion: Operational Excellence**	**Tactical Roundtables - Culture Is Paramount, Especially If Not Essential...**
3:15 PM	3:30 PM	**Break**	
3:30 PM	5:00 PM	**Iron Fish Distillery: Our Journey - A Spirited Quest For Excellence! - Grandview 1** *Note: There will be drinks at this session.*	
6:00 PM	8:30 PM	**Monday Night Party & Dinner Cruise -** Discovery Pier	

Tuesday, July 30

		STRATEGIC TRACK Boardman Room	TACTICAL TRACK Grandview 1
7:30 AM	8:30 AM	**Breakfast - Grandview 2**	
8:30 AM	10:00 AM	**AI Unleashed: Your Secret Weapon For Delivering Operational Excellence** Grandview 1	
10:00 AM	10:30 AM	**Break**	
10:30 AM	12:00 PM	**You Want What? When?!? – The Right Projects At The Right Time**	**Empowering IT Service Desk Excellence: Putting Clients First**
12:00 PM	1:15 PM	**Lunch - Grandview 2**	
1:15 PM	2:45 PM	**Meaningful Metrics To Evolve Our Profession**	**Software Savvy: Streamline Your Efficient Onboarding Pipeline**
2:45 PM	3:00 PM	**Break**	
3:00 PM	4:15 PM	**Strategic Roundtables**	**Tactical Roundtables**
4:15 PM	4:45 PM	**Closing Discussion And Adjournment** **Geni Whitehouse, ITA President and Mike Denno, Rehmann Host Firm CIO & Principal** Grandview 1	
6:00 PM	8:30 PM	**Optional Meet Up For Members Staying Until Wednesday** Taproot Cider House	

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Monday, July 29

8:00am – 8:10 am
Track - All   CPE – 80 min.
Room: Grandview 1

Welcome and Agenda Review

> *Geni Whitehouse – ITA President, Napa, CA*

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

8:10am – 9:30 am
Track - All   CPE – 80 min.
Room: Grandview 1

Host Firm Welcome and Executive Presentation

> *Mike Denno – Chief Information Officer, Principal, Rehmann, Saginaw, MI*
> *Stacie M. Kwaiser, CPA – CEO, Rehmann, Saginaw, MI*

10:00am – 11:30am
Track – Strategic   CPE – 90 min.
Room: Boardman Room

Developing A Great IT Culture

> *Jim Hayes - Rehmann, Lansing, MI*
> *Shawn Gospodarek – Elliott Davis, LLP, Greenville, ND*
> *Pete Saputo – The Bonadio Group, Pittsford, NY*

Developing a great culture is crucial in maintaining an engaged and high-performing IT Team. Without it, teams lessen their sense of belonging, increase toxic interactions, and experience higher turnover and lower satisfaction scores. In this session, we focus on important categories of a Great IT Culture in an entertaining and interactive manner. Attendees will take away ideas and action items to improve their own workplace culture.

Elevating The Associate Onboarding Experience: A Blend Of Automation And Personalization
Austin Greca - Rehmann, Ann Arbor, MI
Nick Bessinger - BDO, USA, Grand Rapids, MI

In the competitive landscape of professional services, the onboarding experience for new associates is a critical determinant of long-term success and employee retention. Yet, many firms still grapple with outdated and inefficient onboarding processes. A mere 12% of employees strongly agree that their organization does a great job of onboarding new employees, as per a Gallup report. In an era where every detail counts, it's time to revolutionize the way we welcome our future leaders.

Join us for a dynamic session where we'll dissect the current state of associate onboarding and unveil cutting-edge strategies to enhance this crucial phase. We will delve into the transformative potential of Robotic Process Automation (RPA) and Application Programming Interfaces (APIs), which have been instrumental in redefining the onboarding landscape by automating routine tasks and facilitating seamless data integration.

We'll share success stories and practical insights on crafting automated workflows that not only assign tasks efficiently but also adapt to the unique needs of different business units, ensuring a tailored onboarding experience for every new hire. Discover the art of automating welcome messages that deliver critical first-day information, setting the stage for a memorable start.

The session will also highlight the symbiotic relationship between HR and the broader organization in orchestrating pre-start day communications that resonate with new associates, laying the groundwork for their journey ahead.

Learning Objectives:
•   How organizational maturity impact your ability to manage change
•   How to deliver and plan meaningful communications to get the business outcomes you want
•   Understand the pivotal role of automation in modernizing the associate onboarding process and how it can be leveraged to create a more effective and engaging experience.
•   Learn how to design and implement automated workflows that assign tasks and deliver personalized welcome messages to new hires, ensuring a smooth transition into their roles.
•   Gain insights into the collaboration between HR and business units to address the specific onboarding needs of different departments, fostering a sense of belonging from day one.
•   Explore the impact of strategic HR messaging on the onboarding experience and how it can set a positive tone for new associates' tenure at the firm.

12:30pm – 1:45pm
Track – Strategic   CPE – 90 min.
Room: Boardman Room
Change Is The Only Constant
>	*Michael Giuli – Cherry Bekaert LLP, Tampa, FL*
>	*JD Stotts – Whitley Penn, Fort Worth, TX*
>	*Others TBD*

It's difficult to get leaders to understand the only thing you can count on is change. While it would be nice to be predictable, change happens – so be in a position to lead it.

Change happens one person at a time. It is personal, and you must meet each person in your organization where they are. If you don't, you risk failing to bring the organization along with you. One message or way of communicating isn't enough. Everyone is different, so each person absorbs information differently.

During this participatory panel session participants will learn :
•	How organizational maturity impact your ability to manage change
•	How to deliver and plan meaningful communications to get the business outcomes you want
•	How to drive the behavior change that made you think it was a good idea in the first place
•	Manage stakeholder expectations
•	Structure the organization for maximum effectiveness
•	What's (not) worked for others

12:30pm – 1:45pm
Track – Tactical   CPE – 90 min.
Room: Grandview 1
Digital Employee Experience: Sync For Success
>	*Chris Fitzmaurice – Rehmann, Saginaw, MI*
>	*Nathan Gaude – Elliott Davis, LLC, Greenville, SC*

In today's fast-paced digital workplace, the performance and reliability of devices, services, and programs are crucial for maintaining productivity and employee satisfaction. This session will delve into the critical aspects of the digital employee experience, focusing on the mobility and effectiveness of work-related tools and collaboration technologies. We will explore how IT departments collaborate with businesses and individual employees to address issues, deploy new technologies, provide training, and understand employee requirements to deliver tailored solutions.
•	Understand the importance of device, service, and program performance and reliability in the digital workplace.
•	Explore strategies for enhancing the mobility and effectiveness of work-related tools.
•	Learn about the latest collaboration technologies and their impact on teamwork and productivity.
•	Gain insights into how IT departments work with businesses to address service requests and issues promptly.
•	Discover best practices for deploying new technologies and training employees effectively.
•	Understand the value of continuous collaboration between IT and employees to meet their needs and improve the digital employee experience.

2:00pm – 3:15pm
Track – Strategic   CPE – 75 min.
Room: Boardman Room

Strategic Roundtable Discussion: Operational Excellence

David Emmer - Anchin, Block & Anchin LLP, NY, NY

Join your peers for an in-depth roundtable discussion on achieving operational excellence. We will explore best practices, innovative strategies, and actionable insights to enhance efficiency, streamline processes, and drive sustainable growth.

2:00pm – 3:15pm
Track – Tactical   CPE – 75 min.
Room: Grandview 1

Tactical Roundtables - Culture Is Paramount, Especially If Not Essential…

Steven King – Crowe, LLP, Houston, TX

Leveraging concepts from Patrick Lencioni's book "The Advantage: Why Organizational Health Trumps Everything Else in Business", which presents the Organizational Health Model emphasizing the importance of a healthy organizational culture for achieving sustained success. The roundtable facilitator will foster a discussion about the model's four key disciplines:

1. Build a Cohesive Leadership Team: This involves fostering trust among team members, engaging in healthy conflict, committing to decisions, holding each other accountable, and focusing on collective results.
2. Create Clarity: This discipline stresses the need for a unified understanding of the organization's purpose, values, strategy, and goals. Leaders must be clear on why the organization exists, what behaviors and actions are valued, what business they are in, how they will succeed, what is most important right now, and who must do what.
3. Overcommunicate Clarity: Leaders should repeatedly communicate these key messages to ensure everyone in the organization understands and aligns with them. This involves using multiple channels and reinforcing the messages consistently.
4. Reinforce Clarity: Systems, processes, and human resource activities should be aligned with the organization's clarity to reinforce the desired culture. This includes hiring, managing performance, and making strategic decisions that align with the organization's core values and goals.

In his book, Lencioni argues that by rigorously applying these disciplines, organizations can achieve higher levels of performance, employee engagement, and overall success.

Learning Objectives:
• Why organizational health is critical to achieving excellence.
• Ways to build a cohesive leadership team.
• How to create clarity amongst teams.
• Approaches to "over-communicate clarity".
• Methods to reinforce clarity.

3:30pm – 5:00pm
Track – All   CPE – 90 min.
Room: Grandview 1

Iron Fish Distillery: Our Journey - A Spirited Quest For Excellence!

Heidi Bolger – Iron Fish Distillery
David Wallace – Iron Fish Dillery

Careers in professional service firms are a great proving ground for wherever life takes you. This entrepreneurial duo will share their tale of lessons learned and their NOW chapter in their "whiskey centric" enterprise.   This interactive discussion will have you reflecting on some key elements that drive excellence in teams that in turn empowers delivery of great products, services and superb customer experience. Come and hear their crazy, fun story of launching Iron Fish Distillery and their long journey and pursuit of a rememberable customer experiences, while you sample their tasty products.   Attendees will take away:

•   Ideas to inspire leaders and teams to build excellence into customer experience.
•   Insight in what it takes to start-up and thrive in a new business venture.

Tuesday, July 30

8:30am – 10:00am
Track – ALL   CPE – 90 min.
Room: Grandview 1

AI Unleashed: Your Secret Weapon For Delivering Operational Excellence

Andrew Young – Baker Tilly, Chicago, IL

Discover how Generative AI (Gen AI) can transform client service and organizational excellence. This panel will explore practical implementation tips, strategies to stay ahead in AI, and real-world examples of AI-driven client service enhancements. We'll also discuss the impact of AI tools like Microsoft Copilot, ethical considerations, and fostering an AI-friendly culture. Essential for business leaders aiming to leverage AI for superior client service and operational efficiency.

10:30am - Noon
Track – Strategic   CPE – 90 min.
Room: Boardman Room

You Want What? When?!? – The Right Projects At The Right Time

Colleen Beyer - Cherry Bekaert LLP, Nashville, TN
Kathleen Fluke – Crowe LLP, Indianapolis, IN
Laura Friedman – Whitley Penn, Plano, TX
Karin Gehrke – Wipfli, LLP, Eau Claire, WI

The pace of digital transformation and volatility of the business environment has increased the frequency of changes impacting enterprise priorities. In today's environment, how do you deliver the right projects at the right time to achieve desired business outcomes across service lines. Participants will learn tips and tricks to:

•   Meet the business where they are
•   Manage stakeholder expectations
•   Structure the organization for maximum effectiveness
•   Deliver meaningful communications
•   Develop success criteria

10:30am - Noon
Track – Tactical   CPE – 75 min.
Room: Grandview 1

Empowering IT Service Desk Excellence: Putting Clients First

Facilitator:
Mary Boyle – Rehmann, Farmington Hills, MI
Panelists:
Nick Bessinger - BDO, USA, Grand Rapids, MI
Patrick Justice - Elliott Davis, LLC, Greenville, SC
Steven King – Crowe, LLP, Houston, TX
Michael Voegtline – Wipfli LLP, Wausau, WI

Client service should be at the forefront of a good Service Desk. In this session we will define the principles of a client-focused mindset in the context of the IT Service Desk Team. These principles reflect a dedication to not only resolving technical issues but also fostering positive relationships with clients, which is essential for the growth and success of IT service desk teams.

Learning Objectives
• Review proactive communication and the need to keep clients informed
• Discuss personalized support and how to tailor a solution to fit the unique needs and preferences of each client including an international client base
• Seek information on feedback implementation and how to incorporate client feedback t improve services and support
• Discover how to demonstrate a genuine concern for client's issues through empathy and understanding, striving to understand their perspective
• Hear first-hand how we commit to ongoing training and development to better serve client needs for continuous improvement
• How are we ensuring timely and effective responses to client inquiries and support requests?
• Understand how we are consistently delivering high-quality solutions that meet or exceed client expectations
• Learn how to build trust by establishing a reliable and trustworthy relationship with clients through c consistent and dependable service

1:15pm – 2:45pm
Track – Strategic   CPE – 90 min.
Room: Boardman Room

Meaningful Metrics To Evolve Our Profession

Aaron Gray – CLA Phoenix, AZ
Michael Pynch – Wipfli LLP, Eau Claire, WI

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 when analyzing and comparing data.
• How are Application, Financial, and Operational metrics are evolving and how we can ensure that what is being collected is optimal and meaningful.
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 collaborative discussion that will help you leverage metrics today and ensure we continue to evolve this annual process.

Track – Tactical   CPE – 90 min.
Room: Grandview 1

Software Savvy: Streamline Your Efficient Onboarding Pipeline

Facilitator:
Nathan Gaude – Elliott Davis, LLC, Greenville, SC
Panelists:
Robert Neill – Weaver, Austin, TX
Andrew Young – Baker Tilly, Chicago, IL

Discuss how to streamline your software onboarding process for maximum efficiency in this focused session. What are essential strategies and best practices for evaluating, selecting, and integrating new software seamlessly into your organization? We'll also cover the basics of software rationalization to help you optimize your software portfolio by eliminating redundancies and aligning with business goals. This session will discuss the tools and knowledge that ensure a smooth and efficient software onboarding experience.

3:00pm – 4:15pm
Track – Strategic   CPE – 75 min.
Room: Boardman Room

Strategic Roundtable Discussion

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

3:00pm – 4:15pm
Track – Tactical   CPE – 75min.
Room: Grandview 1

Tactical Roundtables

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 & Leader
Karin Gehrke – Wipfli LLP, Eau Claire, WI
Applications and Development
Julian Benjamin – Marcum LLP, Melville, NJ
Elena Trueloe – MNP LLP, Calgary, AB, Canada
Project Management
Debbi Forster – Plante Moran, Southfield MI
Security/Compliance
Kevin Yenglin – Rehmann, Saginaw, MI
Support Desk / Service
Mary Boyle – Rehmann, Farmington Hills, MI

4:15pm – 4:45pm
Track – All
Room: Grandview 1
Closing Discussion and Adjournment
Mike Denno – Chief Information Officer, Principal, Host Firm Rehmann, Saginaw, MI
Geni Whitehouse – ITA President, Napa, CA

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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

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