FALL
2024 ITA COLLABORATIVE
Indian Wells, California

ITA Mobile
Your Meeting Guide
https://eventmobi.com/itafall2024

X #ITAlliance

ita

Sunday, November 3

Time	
7:00ᴬᴹ - 1:30ᴾᴹ	Optional Social Events
2:30ᴾᴹ - 7:30ᴾᴹ	Badge Pickup Crystal Ballroom Foyer (Terrace Level)
3:30ᴾᴹ - 4:30ᴾᴹ	Meet, Greet & Eat Reception Stir (Terrace Level)
4:30ᴾᴹ - 6:00ᴾᴹ	ITA OPENING SESSION Crystal Ballroom A-F President's Welcome by Geni Whitehouse (30 minutes) KEYNOTE: The Future of Leadership by Cheryl Cran (60 minutes)
6:00ᴾᴹ - 7:30ᴾᴹ	Welcome Reception Stir
7:30ᴾᴹ	Dinner On Your Own and Various Partner Events

Monday, November 4

Time	
7:00ᴬᴹ - 8:00ᴾᴹ	Breakfast Valencia Ballroom (Terrace Level)
7:00ᴬᴹ - 5:00ᴾᴹ	Badge Pickup Crystal Ballroom Foyer
8:00ᴬᴹ - 10:00ᴬᴹ	MONDAY OPENING SESSION Crystal Ballroom A-F President's Opening Remarks by Geni Whitehouse (30 minutes) Overview of the ITA Leadership's Academy (ILA) by Bret Romney (20 minutes) KEYNOTE: Leadership Lessons from Virgin Galactic's Journey to Space by Stephen Attenborough (60 minutes)

TRACKS & SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING SERVICES (CAS)	Internal Tech Leaders (ITL)	
	CR TRACK 1 Crystal D-F	CR TRACK 2 Crystal G	Crystal H	ITL STRATEGIC Crystal I	ITL TACTICAL Crystal A-C
10:30ᴬᴹ - 12:00ᴾᴹ	100 Years of Leadership Study: How Far Have We Come?	Empowering Growth: Finding and Spreading Business Process Knowledge	Mastering Client Accounting and Advisory Services (CAAS): Strategies for Growth and Career Development	Evolving IT Organization Structures: Beyond the Traditional Org Chart	Applied AI - Shifting of Internal Tasks
12:00ᴾᴹ - 1:15ᴾᴹ	Lunch Valencia Ballroom				
1:15ᴾᴹ - 2:30ᴾᴹ	How to Develop a Comprehensive Client Engagement Program	Unlocking Post-Engagement Insights: Gathering Feedback for Wins and Losses	Elevating CAS: Strategies for Growth & Stakeholder Engagement	Enhancing Cyber Resiliency in the Face of Evolving Threat Landscapes	Demystifying Master Data Management
2:45ᴾᴹ - 4:00ᴾᴹ	Navigating the ERP Selection Consultant Landscape: Strategies for VARs and ISVs in Partnering with Consulting Firms	Bridging Generational Gaps to Build Company Consensus	Shaping the Future: Influencing Recruitment and Curriculum	AI in Our Profession – Practical Use Cases Today and a Look at the Future Crystal A-C	
4:15ᴾᴹ - 5:15ᴾᴹ	The Talent Magnet: Creating a Culture that Attracts and Retains Top Performers Crystal A-C		Scaling CAAS Services Across Firm Types	ITL Strategic Roundtable (Closed Session-CIOs Only)	ITL Tactical Roundtable Crystal D-F
6:30ᴾᴹ - 9:00ᴾᴹ	DINNER AND RAT PACK PARTY (YOU DON'T WANT TO MISS THIS!) Olive Grove Lawn				

Tuesday, November 5

Time	
7:00ᴬᴹ - 8:00ᴬᴹ	Breakfast Valencia Ballroom

TRACKS & SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING SERVICES (CAS)	Internal Tech Leaders (ITL)	
	CR TRACK 1 Crystal D-F	CR TRACK 2 Crystal G	Crystal H	ITL STRATEGIC Crystal I	ITL TACTICAL Crystal A-C
8:00ᴬᴹ - 9:00ᴬᴹ	TUESDAY KEYNOTE Crystal Ballroom A-F KEYNOTE: Navigating the Economic Landscape: Insights and Impacts for Technology Professionals by Taylor St. Germaine				
9:30ᴬᴹ - 10:30ᴬᴹ	The Price is Right: The New Way to Approach Pricing for a Subscription Model	Stewardship in Action: A Leadership Case Study	How do I Compare? Insights from the 2024 CPA.com CAS Benchmarking Survey	Audit Platforms of the Future: DAS and Others	Who Owns Reporting and Dashboards?
10:45ᴬᴹ - 11:45ᴬᴹ	Transforming your Client Outcomes with Generative AI	Igniting Creativity: Putting Authenticity and Innovation at the Forefront	Shaping Future CAS Leaders: Skills, Insights, and Developments	Secret Sauce to Hire for Success: Build, Boost, and Brag About Your IT Dream Team! (Closed Session-CIOs Only)	Data Classification & Implementing Effective Data Loss Prevention (DLP)
11:45ᴬᴹ - 12:45ᴾᴹ	Lunch Valencia Ballroom				
12:45ᴾᴹ - 1:45ᴾᴹ	Optimizing Partner Relationships to Win Business and Drive Success Crystal D-F		Workflow Management Software: From Selection to Success	Data as Your Next Superpower	Modern Endpoint Management with Intune, Windows 11, and Autopilot
2:00ᴾᴹ - 3:00ᴾᴹ	CR Roundtable: What Did You Learn and How Will You Apply It? Crystal D-F		CAS Fireside Chat	ITL Strategic Roundtable	ITL Tactical Roundtable
3:00ᴾᴹ - 3:30ᴾᴹ	Wrap Up Sesssion by Geni Whitehouse Crystal A-C				

Wednesday, November 6

Time	
8:30ᴬᴹ - 3:00ᴾᴹ	ITA Leadership Alliance (ILA) Base Camp Crystal I (Note: Separate Registration Required)

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

KEYNOTE General Sessions – By Date and Time

SUNDAY, November 3 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)

ALL
4:30 – 4:45 pm
President's Welcome & Introductions
Room: Crystal Ballroom A-F
Geni Whitehouse – ITA President, Napa, CA
ITA President Geni Whitehouse will introduce our Fall Collaborative Committees and welcome our new members and guests. She will also provide an overview of the Fall Collaborative agenda prior to introducing our Sunday night keynote speaker.

ALL
4:45 – 6:00 pm
KEYNOTE: The Future of Leadership
Room: Crystal Ballroom A-F
Cheryl Cran – NextMapping, Vancouver, BC
We are working and living in a time with more uncertainty, more ambiguity, more unknowns, and ongoing relentless change. Leaders and workers are challenged with navigating constantly changing variables including impact of AI, hybrid workplace, increase in mergers and acquisitions, diverse generational attitude shifts and more. The future is calling for leaders to be inspiring, agile, to be change leaders and to be able to lead more collaboratively than ever before.

In this keynote with future of work expert Cheryl Cran leaders will gain:
- The most up to date research on the future workplace dynamics and what to about it now.
- Statistics and research on worker attitudes and the changing job markets.
- Tips and strategies on how to increase attraction of Gen Z and Millennials and help them grow through succession planning.
- Leadership models to help increase context on leading in uncertain times such as the 'change leadership model' and the 'me to we' model.
- Insights on the job market and the positive impact on the technology sector.
- Advice on how leaders can be prepared for potential impact of mergers and acquisitions now and in the future.
- Tips tactics and strategies on the skills needed for leaders to be future ready now.

ALL
8:00 – 8:30 am
President's Opening Remarks
Room: Crystal Ballroom A-F

Geni Whitehouse – ITA President, Napa, CA

ITA President Geni Whitehouse will introduce our Fall Collaborative Committees and share opportunities for participation. Geni will share some other exciting ITA Events and plans.

ALL
8:30 – 8:45 am
Overview of the ITA Leadership's Academy (ILA)
Room: Crystal Ballroom A-F

Bret Romney – Ascend Strategies, Montana City, MT

Join us to learn about the amazing ITA Leadership Academy (ILA). Building leadership is critical to the near and long term success of your firm or company.

ITA's Leadership Alliance (ILA) has been designed to accomplish the following goals:
- To awake and enhance a desire to grow as leaders.
- To provide tools that foster leadership development and unleash potential.
- To develop deep peer interaction – ideas, sounding board and support.
- To improve communication.
- To facilitate more successful succession – leadership and ownership.
- To grow the next leaders of ITA members.

ALL
8:45 – 10:00 am
KEYNOTE: Leadership Lessons from Virgin Galactic's Journey to Space
Room: Crystal Ballroom A-F

Stephen Attenborough – Rye Bay Consulting Ltd., London, England

Stephen Attenborough joined Virgin Galactic in 2004 as its founding employee, where he laid the commercial foundations for the world's first spaceflight. Over 18 years, he served as Commercial Director and Chief Customer Officer, responsible for guiding customers through the transformative journey of spaceflight. His experience with Virgin Galactic culminated in Richard Branson's historic space trip and helped the company become the first human spaceflight organization to go public.

In his keynote, Stephen will share valuable lessons from his journey that resonate with the technology industry. He'll address the delicate balance between driving innovation and ensuring safety—two key challenges for tech professionals navigating rapid change and regulatory demands. He will also speak to the art of managing financial and timeline expectations from stakeholders while facing unexpected technical and operational hurdles. Through this lens, Stephen will offer insights into maintaining stakeholder engagement and support, even in the face of constant unpredictability.

Finally, Stephen will provide a glimpse into one of the most exciting new frontiers, sharing perspectives that inspire innovation and bold thinking, essential qualities for leaders in our industry.

Learning Objectives:
- Attendees will learn how to balance the drive for technological innovation with the need to ensure safety and compliance, essential for tech professionals working in rapidly evolving and regulated industries.
- Participants will gain insights into managing financial and timeline expectations from various stakeholders, particularly when faced with unexpected technical and operational challenges.
- Participants will be inspired to adopt bold thinking and leadership approaches, drawing from Stephen Attenborough's experiences in pushing the boundaries of human spaceflight and innovation.

ALL
Keynote: Navigating the Economic Landscape: Insights and Impacts for Technology Professionals
Room: Crystal Ballroom A-F

Taylor St. Germaine – ITR Economics, Manchester, NH

In this session, an expert economist from ITR Economics will provide a comprehensive analysis of current and future economic trends and their direct impact on the technology sector. Attendees will gain critical insights into short- and long-term forecasts, understand how shifts in inflation, interest rates, and taxes could influence business decisions, and explore actionable strategies to navigate various phases of the business cycle. This session will equip you with the knowledge to anticipate changes, leverage key economic indicators, and align your business objectives with emerging opportunities.

Learning Objectives:
• Understand U.S. and global economic forecasts and their implications for the technology industry.
• Identify key business cycle phases and their relevance to your organization.
• Recognize leading economic indicators essential for strategic decision-making.
• Gain insights into considering inflation, interest rates, and tax changes as they relate to your business.
• Explore actionable responses to current economic events

Concurrent Sessions – By Date and Time

CR-1
100 Years of Leadership Study: How Far Have We Come?
Room: Crystal Ballroom D-F
Moderator:
Josh Gilstrap – e2b teknologies, Mentor, OH
Presenter:
Sean Barnes - WSS Solutions, The Woodlands, TX
Does a leader shape the environment, or does the environment shape the leader? Learn how both apply!

CR-2
Empowering Growth: Finding and Spreading Business Process Knowledge
Room: Crystal Ballroom G
Moderator:
Glenn Sharp – LBMC Technology Solutions, Knoxville, TN
Panelists:
Angie Barron- NextTec, Seattle, WA
Ritch Haselden – Kimberlite Partners, San Jose, CA
Sean Hayes – Equify Advisors, Scottsdale, AZ
Misty Palek - LBMC Technology Solutions, Slater, IA
Hiring team members is expensive and incorporating them into your organization's processes is time consuming. This session will review some case studies and have a panel discussion on how we can address and overcome some of these challenges.

CAS

Mastering Client Accounting and Advisory Services (CAAS): Strategies for Growth and Career Development

Room: Crystal Ballroom H

Moderator:

> *Sharon Berman – Rehmann, Detroit, MI*

Panelists:

> *Arna Erazo – GHJ, Los Angeles, CA*
> *Dixie McCurley-- Cherry Bekaert Advisory, Atlanta, GA*
> *Adi Rubin – Marcum, Washington, DC*
> *Michelle Voyer – CohnReznick, Boston, MA*

Join us for a 90-minute panel discussion on CAAS 2.0, where leaders in the field will share their insights on elevating and defining Client Accounting and Advisory Services within your practice. You'll learn about cross-serving CAAS clients with cross-functional teams and the benefits of client concierge. We'll also touch on CPA.com's training by the hour and the complex makeup of CAAS within different practices.

ITL-S

Evolving IT Organization Structures: Beyond and Traditional Org Chart

Room: Crystal Ballroom I

> *Steven Cook – HCVT, Los Angeles, CA*

In today's dynamic business environment, IT organizations are moving beyond the traditional, hierarchical org chart to structures that reflect the complexity and interconnectedness of modern firms. In this session, we will explore and compare the organization charts of ITA firms, analyzing shifts over the past two years in team structures, centralization vs. decentralization, and the integration of emerging roles such as AI specialists. We will also discuss how IT teams are adapting to new work models, including remote and hybrid environments, and examine the rationale behind these changes. Through interactive discussions and real-time comparisons, participants will gain insights into best practices and innovative strategies for structuring IT teams that align with evolving business needs.

ITL-T

Applied AI - Shifting of Internal Tasks

Room: Crystal Ballroom A-C

> *Jamie Simmons – Moss Adams, Seattle, WA*

AI continues to evolve; how can IT departments harness its potential to streamline and transform internal operations? In this interactive discussion, leading CIOs we will explore key trends, use cases, and practical challenges associated with applying AI to IT functions. From automation of routine tasks to AI-driven security, generative AI for development, and predictive analytics, this roundtable discussion session will provide insights into the latest applications of AI that can enhance efficiency, reduce costs, and drive innovation. Participants will also have the opportunity to ideate and share their experiences on overcoming barriers such as skills gaps, technical debt, and data quality. Join us to exchange ideas and strategies for leveraging AI within your IT operations to create greater impact.

CR-1
How to Develop a Comprehensive Client Engagement Program
Room: Crystal Ballroom D-F
Moderator:
> *Arline Welty – DataQuest Inc, Chicago, IL*

Panelists:
> *Heather Broberg – GRF CPAs & Advisors, Bethesda, MA*
> *Alan Clark – Eide Bailly, Salt Lake City, UT*
> *Richard Sellar – Stellar One, Flower Mound, TX*

You spend major coin on attracting and acquiring clients. But once they're established on your roster, how do you keep them growing and thriving with your firm? This panel session is dedicated to inspiring you to develop your own client engagement tools. You'll hear from multiple perspectives about cultivating the client engagement role, the structure of a client engagement program, pricing influences and more.

CR-2
Unlocking Post-Engagement Insights: Gathering Feedback for Wins and Losses
Room: Crystal Ballroom G
Moderator:
> *Michelle Taylor – Dataself Corp, Santa Clara, CA*
> **Panelists:**
> *Heather Broberg – GRF CPAs & Advisors, Bethesda, MA*
> *Gary Crouch – CS3 Technology, Tulsa, OK*
> *Stephanie Forman – Quisitive, Irving, TX*
> *Ben Varilek – Creative Planning, Omaha, NE*

Do you have trouble knowing what your customers think? Hear our panelists share insights on when and how to engage with customers to actually get feedback.

CAS
Elevating CAS: Strategies for Growth & Stakeholder Engagement
Room: Crystal Ballroom H
> *Caroline Jiang – Cohen & Company, Cleveland, OH*
> *Gretchen Naso - RKL Virtual, Lancaster, PA*

Discover how to build on the success of CAS advocacy efforts, measure impact, and educate stakeholders. Understand the unique positioning of CAS in comparison to other service lines and the role of internal advisory boards.

You'll gain valuable insights on:
- Proven success strategies: Learn from over two decades of experience in building and growing a non-traditional business within a CPA firm.
- Making the case for innovation: Discover effective ways to promote CAS, which often differs from traditional CPA models in staffing, training, performance evaluation, and compensation.
- Navigating the boardroom: Explore how CAS leaders can effectively work with their Board and executive leadership to advance advocacy efforts. What information should you share, and what key points should leadership understand?
- Harnessing advisory expertise: Understand the benefits of a CAS Strategic Advisory Board and how it can boost your advocacy efforts.

ITL-S
Enhancing Cyber Resiliency in the Face of Evolving Threat Landscapes
Room: Crystal Ballroom I

Mike Reterstorf - Plante Moran, Southfield, MI

Andrew Young – Baker Tilly, Chicago, IL

This session would delve into strategies for building robust cyber defenses that not only prevent breaches but also ensure rapid recovery and continuity of operations post-incidents (such as being Crowdstruck). Key points would include the integration of advanced threat detection technologies, the importance of regular security audits and simulations, and fostering a culture of security awareness within the organization. By focusing on resiliency, CISOs can better prepare their organizations to withstand and quickly recover from cyberattacks, minimizing downtime and protecting critical assets.

ITL-T
Demystifying Master Data Management
Room: Crystal Ballroom A-C
Moderator:

Andrea Yunk – Wipfli, Wausau, WI

Panelists:

Jon Cormack – CLA, Minneapolis, MN

Ravi Ginjupalli – Plante Moran, Southfield, MI

Common issues have impeded organizations from gaining the best advantage from an MDM program. At the highest level, these challenges include the lack of executive support; weak (or absent) business case; complexity in data, system, and process integration; and insufficient or no governance. This panel will share what goes into planning for MDM, approach, high level architecture on how they have overcome some of the challenges and what success they have achieved.

Learning Objectives
- How to align business processes to support master data management and governance
- How to design data governance to support MDM
- How to find "quick wins" for master data rollout and implementation
- Business value and use cases for master data management.
- Architecture options for MDM, and an overview of various approaches
- Panel members will walk through an example of implementing MDM.

MONDAY, November 4 - 2:45 – 4:00 pm – (75 CPE Minutes)

CR-1
Navigating the ERP Selection Consultant Landscape: Strategies for VARs and ISVs in Partnering with Consultation Firms
Room: Crystal Ballroom D-F
Moderator:

Matt Wassink - SPS Commerce, Minneapolis, MN

Speaker:

Shawn Windle – ERP Advisors, Denver, CO

Panelists:

Bobby Coffin – SCS Cloud, Clearwater, FL

Tom Fahres – Martin & Associates, Cincinnati, OH

Seth Fike – Scanco, Nokomis, FL

In today's competitive landscape, effective collaboration between VAR's, ISV's, and Selection Consulting firms is crucial for successful outcomes in the ERP selection process. Explore best practices for fostering strong partnerships that enhance every phase of the sales cycle, from RFP to discovery, demo, negotiation, and implementation.

Join us as we delve into strategies for aligning goals, sharing insights, and streamlining communication to create a seamless experience for clients. Learn how VARs and ISVs can leverage the expertise of consulting firms and vice versa, to better understand client needs and deliver tailored solutions. We'll discuss:

- RFP Management: Strategies for crafting compelling proposals that highlight the strengths of all partners involved.
- Discovery Process: Techniques for effective information gathering and needs analysis that foster collaboration and uncover key insights.
- Demonstration Techniques: Tips for delivering impactful demos that resonate with clients, showcasing the combined value of software and consulting expertise.
- Negotiation Tactics: Best practices for negotiating contracts that benefit all parties while ensuring client satisfaction.
- Implementation Strategies: Ensuring a smooth transition from selection to implementation through coordinated efforts and shared responsibilities.

This session is designed for VARs, ISVs, and consulting professionals eager to deepen their partnerships, enhance their strategic approach, and ultimately deliver exceptional value to clients navigating the ERP selection process. Join us for an interactive discussion and gain actionable insights to elevate your collaborative efforts!

CR-2
Bridging Generations: Gaps to Build Company Consensus
Room: Crystal Ballroom G
Moderator:
Todd Parrish – goVirtualOffice, Waunakee, WI
Panelists:
Laura Atkins – RKL eSolutions, Lancaster, PA
Patrick Johnson – Oasis Solutions, Louisville, KY
Bret Romney – Ascend Strategies, Montana City, MT

In today's workforce, multiple generations—from Baby Boomers to Gen Z—bring diverse perspectives, work styles, and communication preferences. This session will explore strategies for effectively working with these different generations and fostering a unified approach to achieving organizational goals.

Key Topics:
- Understanding Generational Differences: A brief overview of the defining characteristics, values, and motivations of Baby Boomers, Gen X, Millennials, and Gen Z.
- Barriers to Communication: How differing communication styles can lead to misunderstandings and tension between generations.
- Strategies for Effective Communication: Tips for creating an inclusive communication strategy that resonates with all generations—leveraging digital tools, face-to-face interaction, and collaborative platforms.
- Building a Culture of Collaboration: Practical ways to create an environment where all generations feel heard, respected, and aligned towards the company's mission.

Takeaways: Participants will leave with actionable strategies for improving intergenerational communication and creating a more cohesive, goal-focused work environment.

CAS
Shaping the Future: Influencing Recruitment and Curriculum
Room: Crystal Ballroom H
Moderators:
Jessica Barnas – Wipfli, Aurora, IL
Gregg Landers – CBIZ MHM, San Diego, CA
Presenters:
Devin Barnas – Kuesel Consulting, Aurora, IL
Sharon Lightner – Professor Emerita SDSU - Former Business Dean CSUSM, San Diego, CA
Ronald Ramirez – Cal State San Marcos University, San Marcos, CA

In this session, we will discuss strategies to enhance CAS visibility in college curricula and influence recruitment. We will review the current state, industry initiatives, and the potential for integrating this into broader advocacy efforts.

ITL-ALL
AI in Our Profession – Practical Use Cases Today and a Look at the Future
Room: Crystal Ballroom A-C

> *Jeff DeGroot – Plante Moran, Southfield, MI*
> *Kevin Merlini – Materia AI, Brooklyn, NY*

This talk provides the audience with practical insights on leveraging GenAI at their firms today, from the perspective of a technologist building products for the profession. The session will introduce a unified framework for conceptualizing the spectrum of use cases and problems to solve in public accounting (the what & why), along with a framework & toolkit for how to approach solving these problems with generative AI (the how). We will then apply these concepts with hands on use case demonstrations, and then end with a practical discussion on where GenAI is going and how to think about this within the context of your firm's strategy.

Learning Objectives:
- Audience will walk away with a better understanding of how to practically approach getting value out of GenAI at their firms, with an understanding of what is possible based on different approaches and how that should inform their firm's strategy.
- Attendees will be more confident in their ability by providing practical/actionable tips and specific AI use cases.
- Inform attendees in a practical way about where AI is going and why it matters for them.

MONDAY, November 4 – 4:15 – 5:15 pm – (60 CPE Minutes)

CR-ALL
The Talent Magnet: Creating a Culture That Attracts and Retains Top Performers
Room: Crystal Ballroom A-C

> *Lori Seal – Blytheco, Irvine, CA*

In today's competitive business environment, attracting and retaining top talent is essential. This interactive session unpacks proven and innovative strategies to build a "destination employer" brand, hire with intention, and retain and celebrate top talent. Attendees will explore best practices and innovative ideas to:
- Curate an inspirational company culture and implement strategies to be a "Best Companies to Work For" employer.
- Convey your Employer Value Proposition (EVP) that clearly articulates what makes your company unique and why top talent should want to work there.
- Promote the company creatively to showcase your company culture, employee stories, and achievements while encouraging teammates to share their positive experiences and company news.
- Vet and onboard talent thoughtfully and thoroughly to maximize hiring fit and role success through a world-class recruiting selection and onboarding process.
- Maximize retention through high employee engagement, enrolling team members into your mission, and recognizing success with proven reward systems.

This course invites you to collaborate as we tackle the most important asset we have: our people!

CAS
Scaling CAAS Services Across Firm Types
Room: Crystal Ballroom H
Moderator:

> *Jessica McCracken – Intuit, Tucson, AZ*

Panelists:

> *Aaron Berson – Fringe Advisory*
> *Korey Cournoyer - Growth Lab Finance As a Service, Providence, RI*
> *Matthew West - Creative Planning, Brighton, MI*
> *Chris Williams - System Six, Seattle, WA*

BPO Insights: Performance and Accountability in Shared Services. Gain perspectives from non-CPA firms and explore how Business Process Outsourcing (BPO) is shaping shared services. Delve into accountability standards, CAS Delivery, and the interplay of regulations like SSARS 21.

ITL-S
ITL Strategic Roundtable
(Closed Session – CIO's only)
Room: Crystal Ballroom I
Moderators:

>*Paul Blowers – Plante Moran, Southfield, MI*
>*Michael Pynch – Wipfli, Eau Claire, WI*

What's on your mind? Closed discussion among CIO's.

ITL-T
ITL Tactical Roundtables
Room: Crystal Ballroom D-F
Table Leaders:

>Infrastructure & Security: *Edward Kim – HCVT, Los Angeles, CA*
>Service Delivery, Metrics and Support: *Kent Smyth – MNP, Brandon, MB, Canada*
>App Dev: *Adam Zouak – MNP, Calgary, AB, Canada*
>Portfolio & Project Management: *Heather Dodds – MNP, Brandon, MB, Canada*

The ever-popular ITL Tactical Roundtables 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!

TUESDAY, November 5 – 9:30 – 10:30am

CR-1
The Price is Right: The New Way to Approach Pricing for a Subscription Model
Room: Crystal Ballroom D-F
Moderators:

>*Josh Gilstrap – e2b teknologies, Mentor, OH*
>*Moira Goggin – DSD Business Systems, Long Beach, CA*

Panelists:

>*Kayley Bell – DSD Business Systems, San Diego, CA*
>*Lynne Henslee -- e2b teknologies, Mentor, OH*
>*Doug Johnson – Acumatica, Reston, VA*
>*Dirk Shimpach – goVirtualOffice, Waunakee, WI*
>*Craig West -- NetSuite, San Mateo, CA*

Listen to our panel of Vendor experts describe how they navigate the jungle of subscription pricing, support plans and upselling in an ARR driven world.

CR-2
Stewardship in Action: A Leadership Case Study
Room: Crystal Ballroom G
Moderators:

>*Patrick Johnson – Oasis Solutions, Louisville, KY*
>*Patrick Johnson – LBMC Technology Solutions, Decatur, GA*

The greatest leaders inspire more in people. We aren't referring necessarily to production or efficiency or excellence or creativity, although these might be highly desired coproducts! Great leaders can reach and help release an energy which seems to emanate from somewhere deeper in people. This energy is the fuel and catalyst of STEWARDSHIP, the most potent, meaningful and rewarding expression of engagement. And everyone is measuring employee engagement!

This session explores the origins of this energy. It can't be taken. It must be released and given willingly!

Attendees of this session will emerge having:

- Experienced one company's journey to an awareness and understanding of stewardship, and its ability to transform.
- Learned how stewardship is different from other organizational concepts like culture, spirit and mission or purpose, values and vision…but at the same time absolutely vital to the authenticity of each.
- Identified opportunities to establish stewardship, and strategies to release its energy, and transformative effects!
- Found ways to enhance your own leadership approach, though encouraging stewardship.

You may realize stewardship already exists in your organization, and not even know it was at work!

CAS
How do I Compare? Insights from the 2024 CPA.com CAS Benchmarking Survey
Room: Crystal Ballroom H
Moderator:
Kim Blascoe - CPA.com/AICPA, New York, NY
Panelists:
Amy Bridges – CPA.com/AICPA, New York, NY
Nina Chmura – Withum, Princeton, NJ
Dixie McCurley -- Cherry Bekaert Advisory, Atlanta, GA

The Client Advisory Services practice area has documented the fastest growth in the profession for nearly a decade, and continues to evolve rapidly based on changing technology, strategies, and firm structure. This growth represents new services, updated pricing strategies, better understandings of service delivery by firm staff and clients, and broader advisory offerings made available as part of the CAS bundled services.

Hear the latest insights from the soon-to-be released 2024 CAS Benchmark Survey, including special ITA firm specific metrics, and consider how metrics for defining CAS success are impacted by the accelerated pace of change firms have seen in the current decade. We'll discuss the impact of alternative practice structures and consider how PE backing changes the metrics a CAS practice needs to define, report and prioritize.

Learning Objectives:
- Recognize the elements and methodology of a benchmark survey and understand it's use within your firm
- Identify how to align the survey results to your CAS practice and your firm
- Understand the key areas of impact from external forces such as PE investment, and plan for ways to use metrics to highlight your CAS practice success.

ITL – S
Audit Platforms of the Future: DAS and Others
Room: Crystal Ballroom I
Moderator:
Heather Mesquita – Caseware, Toronto, Canada
Panelists:
Matt Baxter - Caseware, Toronto, Canada
Karl Busch – AICPA, New York, NY
Kyle Silverman - Caseware, Toronto, Canada

Join this session for a discussion on:
- Update on DAS
- Audit Quality & Efficiency
- Interoperability
- AI and Data in the Audit Process
- Customization Considerations

ITL - T
Who Owns Reporting and Dashboards?
Room: Crystal Ballroom A-C
Moderator:
>*Aaron Gray – CLA, Phoenix, AZ*

In today's data-driven world, the ownership of reporting and dashboards is a critical topic that impacts the efficiency and effectiveness of an organization. This session will delve into the roles and responsibilities associated with reporting and dashboards, exploring who should take charge and why.

TUESDAY, November 5 – 10:45 am – 11:45 pm

CR-1
Transforming Your Client Outcomes with Generative AI
Room: Crystal Ballroom D-F
Moderator:
>*Heather Broberg – GRF CPAs & Advisors, Bethesda, Maryland*

Panelists:
>*Glenn Dunlap – Peerview Data, Indianapolis, IN*
>*Brant Hollenkamp – Microsoft, Redmond, WA*
>*Doug Johnson – Acumatica, Reston, VA*
>*Gabriel Michaud – Velixo, Montreal, Canada*

Step into the future of client service with our insightful panel discussion on leveraging generative AI to drive exceptional client outcomes. This session brings together leading AI vendors who are at the forefront of technological innovation, offering you a unique opportunity to explore the transformative impact of generative AI through their expertise and solutions.

Key Highlights:
- Vendor Insights: Hear directly from top AI vendors about the latest advancements in generative AI technologies. Learn how these innovations are reshaping client interactions, enhancing service delivery, and creating new value propositions.
- Real-World Applications: Discover how various generative AI tools and platforms are being deployed across different industries. Our panelists will share success stories and practical use cases that illustrate how their solutions are improving client outcomes.
- Challenges and Solutions: Engage with the panelists as they discuss common challenges and obstacles faced during the implementation of generative AI. Gain valuable insights into overcoming these hurdles and maximizing the impact of AI in client services.
- Future Trends: Get a glimpse into the future of generative AI and its potential developments. Explore emerging trends, upcoming innovations, and how these advancements will continue to evolve the landscape of client engagement and satisfaction.
- Interactive Q&A Session: Participate in an interactive Q&A session where you can ask questions, seek advice, and engage with our panel of experts. This is your chance to get tailored recommendations and insights specific to your organization's needs.
- Who Should Attend: This session is designed for business leaders, IT professionals, consultants, and anyone interested in understanding how generative AI can be leveraged to enhance client outcomes. Whether you're looking to adopt new AI solutions or optimize existing ones, this panel will provide valuable perspectives and actionable insights.

CR-2

Igniting Creativity: Putting Authenticity and Innovation at the Forefront

Room: Crystal Ballroom G
Moderators:

 Joshua Bone – SCS Cloud, Minneapolis, MN
 Moira Goggin – DSD Business Systems, Long Beach, CA
 David Hynek – Business Fitness, Mequon, WI

Discover the power of creativity in your practice! Engage in hands-on problem-solving and storytelling exercises to enhance innovation and client outcomes.

From exploring the significance of creativity in problem-solving and competitiveness to sharing successful case studies, this session offers a platform for participants to integrate creative thinking into their practice. Through interactive team exercises and discussions on innovative storytelling, attendees will gain practical insights to apply in their professional endeavors, ultimately fostering a culture of innovation and client value creation. No artistic experience is required!

CAS

Shaping Future CAS Leaders: Skills, Insights, and Developments

Room: Crystal Ballroom H
Moderator:

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

 Kane Polakoff – CohnReznick, Farmington, MI
 Monika Turek – HoganTaylor, Tulsa, OK
 James Winton – Moss Adams, Denver, CO

This session will kick off with an introduction to the Six Working Genius model, a tool that distills any type of work into six fundamental activities. The model helps individuals identify the type of work that energizes them, enabling them to thrive in their roles. Following this interactive introduction, we will explore recent developments in upskilling at the AICPA, specifically the CAS Core training and Apprenticeship program, which have been designed to equip professionals with critical capabilities to accelerate learning and training essential to CAS.

The session will culminate with a panel discussion, featuring firm leaders who are actively engaging with upskilling initiatives. These include the AICPA DOL Apprenticeship program, advisory skills development, and approaches to curriculum creation. Attendees will leave with practical insights and strategies for developing the next generation of leaders.

ITL - S

Secret Sauce to Hire for Success: Build, Boost, and Brag About Your IT Dream Team!

(Closed Session - CIOs only)
Room: Crystal Ballroom I
Moderator:

 Holly Buckingham – RSM, Davenport, IA
Panelists:

 Shannon Christensen – RSM, Davenport, IA
 Tom Jackson – RSM, Davenport, IA
 Kent Smyth – MNP, Brandon, MB, Canada

Let's build an IT support dream team that's engaged, promotable, and knows their stuff—without needing a constant supply of coffee! Join this interactive course, packed with audience participation, where you'll hear firsthand accounts of how to hire, inspire, and keep your IT rockstars happy.

ITL – T
Data Classification & Implementing Effective Data Loss Prevention (DLP)
Room: Crystal Ballroom A-C
Moderators:
> *Andrew Young – Baker Tilly, Chicago, IL*
> *Rich Watson – RubinBrown, St. Louis, MO*

This session will explore practical measures to safeguard sensitive data across both on-premises and cloud environments. We will share insights into best practices for classifying data based on its sensitivity and regulatory requirements, ensuring that the right controls are in place to protect valuable assets. Key points will include deploying DLP solutions that monitor and control data flow, establishing stringent access controls, and leveraging encryption to protect data at rest and in transit. Additionally, the discussion will cover the importance of employee training and awareness programs to prevent accidental data breaches.

TUESDAY, November 5 – 12:45 – 1:45 pm

CR-ALL
Optimizing Partner Relationships to Win Business and Drive Success
Room: Crystal Ballroom D-F
Moderator:
> *Todd Parrish – goVirtualOffice, Waunakee, WI*
> **Panelists:**
>   *Christina Wedge – Versapay, Atlanta, GA*
> *Andy Zinkle – goVirtualOffice, Waunakee, WI*

In today's competitive market, strong and strategic partnerships are essential to winning business and delivering value. This session will focus on the best practices for cultivating and optimizing partner relationships to create win-win outcomes for vendors, partners, and clients. We'll explore how to work across different channels, align goals, and foster collaboration that drives long-term success. Topics include:

- Identifying and selecting the right partners to enhance your service offering and market reach.
- Building trust and transparency to strengthen partner relationships and enhance collaboration.
- Effective communication strategies to manage expectations and ensure alignment between partners, vendors, and clients.
- How to handle conflicts that pop up into opportunities for deeper collaboration and mutual success.

This session will provide actionable insights into how to maximize your partner ecosystem and leverage these relationships as a competitive advantage. Whether you're a service provider, vendor, or client, learn how to transform your partnerships into key drivers of business growth and client satisfaction.

CAS
Workflow Management Software: From Selection to Success
Room: Crystal Ballroom H
Moderator:
> *Laura Steuber – Miller Cooper & Co., Deerfield, IL*
Panelists:
> *Sharon Berman – Rehmann, Detroit, MI*
> *Jessy Kubal – Moss Adams, Seattle, WA*
> *Victoria Pritchard – RKL Virtual, Exton, PA*

Join us for an in-depth exploration of Workflow Management software, focusing on the critical steps involved in selecting, implementing, and evaluating a solution that best fits your organization. This session will cover:

- Selection Process: Learn about the key factors considered during the selection of workflow management software. We will discuss how the software was chosen, including whether other options were evaluated and what criteria drove the decision.
- Implementation Process: Understand the timeline and steps involved in successfully rolling out the software. We'll cover how long the process took, challenges encountered, and best practices for ensuring a smooth implementation.

- Defining Success: Once the software is live, how do you measure its effectiveness? Discover the metrics used to evaluate workflow efficiency and performance improvements, such as task completion times, process bottlenecks, and overall productivity gains.

Whether you're in the early stages of selecting a platform or looking to optimize your current workflows, this session will provide actionable insights to help you make informed decisions.

ITL – S
Data as Your Next Superpower
Room: Crystal Ballroom I
Moderator:
> *Kim St. Georges – Microsoft, Redmond, WA*

How to democratize data access to enable citizen analytics within your business? Explore the potential of cloud data platform such as Microsoft Fabric, Databricks, Power BI, etc. to enable your business to own, govern, curate and consume reports within their domain of expertise.

ITL - T
Modern Endpoint Management and Intune, Windows 11, and Autopilot
Room: Crystal Ballroom A-C
Moderators:
> *Nathan Gaude – Elliot Davis, Greenville, SC*
> *Josh Noble – Wipfli, Eau Claire, WI*
> *Michael Tylicki – Cohen & Co., Cleveland, OH*

This session will explore endpoint management the modern way. This includes migrating from SCCM to Microsoft Intune, device provisioning with Autopilot, and a roadmap for Windows 11 upgrades. By implementing a cloud native approach, organizations can provide greater endpoint mobility, security and enhance the user experience.

TUESDAY, November 5 –2:00 – 3:00 pm

CR ALL
CR Roundtable: What Did You Learn and How Will You Apply it?
Room: Crystal Ballroom D-F
Moderator:
> *Joshua Bone – SCS Cloud, Minneapolis, MN*

Prerequisite – You took notes and learned something valuable!
"Knowledge Increases In Value When Shared"

This is the motto and driving force of the ITA. You have invested in attending the Fall Collaborative. You have learned from keynote speakers and panelists across 17 curated sessions. You took notes on topics that were important to you and your organization. In this session, we want to hear from you. Which key point will you take with you from ITA? Who will you share it with? How will you implement it? We will also gather your feedback to help improve the Consulting & Reseller experience in future collaboratives.

CAS
CAS Fireside Chat
Room: Crystal Ballroom H
Moderators:
> *Jessica Barnas – Wipfli, Aurora, IL*
> *Kane Polakoff – CohnReznick, Farmington Hills, MI*

CAS Collaborative attendees will come together to reflect on the learning experience for the event. `We will discuss challenges we still face as CAS leaders and what are some ways we can continue to overcome them. We will collaborate on how to design the Fall meeting sessions and how we can continue to enhance this community.

ITL – S
ITL Strategic Roundtables: Selling it or Selling IT?
Room: Crystal Ballroom I
Moderator:
> *JD Stotts – Whitley Penn, Fort Worth, TX*

Selling it or Selling IT? This strategic roundtable session will cover the seemingly unspoken, taboo subject yet an absolutely critical aspect of executive technology leadership: selling and marketing. How well do we sell IT to our bosses and our peers? Do we spend time selling the vision to our teams? What about with our technology vendors? When and where did you start selling? Can you share tricks, changes, message massaging and psychological tactics have we employed that were successful or dreadful mistakes? What can we do bring greater value if we are better salespeople? Let's gather round and share the learnings and challenges of marketing technology at our firms!

ITL- T
ITL Tactical Roundtables
Room: Crystal Ballroom A-C
Table Leaders:
> **Infrastructure & Security:** *Edward Kim – HCVT, Los Angeles, CA*
> **Service Delivery, Metrics and Support:** *Kent Smyth – MNP, Brandon, MB, Canada*
> **App Dev:** *Adam Zouak – MNP, Calgary, AB, Canada*
> **Audit Platforms:** *Myrin Bock – MNP, Calgary, AB, Canada*

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! (MFA and Windows Hello)

TUESDAY, November 5 – 3:00 – 3:30 pm

ALL
Wrap Up
Room: Crystal Ballroom A-C
Moderator:
> *Geni Whitehouse – ITA President, Napa, CA*

General Wrap up session led by ITA President, Geni Whitehouse.

FALL
2024 ITA COLLABORATIVE
Indian Wells, California
November 3-5, 2024
Renaissance Esmeralda Resort & Spa
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NASBA Registry Information

Credit Hours: Up to 13.5 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 m 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

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