



FALL

2024 ITA COLLABORATIVE
Indian Wells, California

November 3-5, 2024
Renaissance Esmeralda Resort & Spa



Sunday, November 3

7:00 AM	1:30 PM	Optional Social Events
2:30 PM	7:30 PM	Badge Pickup
3:30 PM	4:30 PM	Meet, Greet & Eat Reception
4:30 PM	6:00 PM	ITA Opening Session President's Welcome by Geni Whitehouse (30 minutes) KEYNOTE: The Future of Leadership by Cheryl Cran (60 minutes)
6:00 PM	7:30 PM	Welcome Reception
7:30 PM		Dinner On Your Own and Various Partner Events

Monday, November 4

7:00 AM	8:00 AM	Breakfast				
7:00 AM	5:00 PM	Badge Pickup				
8:00 AM	10:15 AM	Monday Opening Session President's Opening Remarks by Geni Whitehouse (5 minutes) Overview of the ITA Leadership's Academy (ILA) Bret Romney (10 minutes) KEYNOTE: Topic TBD by Stephen Attenborough (90 minutes)				
Tracks & Sessions		Consulting & Reselling (CR)		Client Accounting Services (CAS)	Internal Tech Leaders (ITL)	
		CR TRACK 1	CR TRACK 2	CAS	ITL STRATEGIC	ITL TACTICAL
10:30 AM	12:00 PM	Anatomy of Modern Leadership: Adapting to Evolving Times	Empowering Growth: Finding and Spreading Business Process Knowledge	Mastering Client Accounting and Advisory Services (CAAS): Strategies for Growth and Career Development	How is Your IT Dept Structured	Applied AI - Shifting of Internal Tasks
12:00 PM	1:15 PM	Lunch				
1:15 PM	2:30 PM	Crafting Client Engagement Excellence	Unlocking Post-Engagement Insights: Gathering Feedback for Wins and Losses	Elevating CAS Strategies for Growth and Stakeholder Engagement	Enhancing Cyber Resiliency in the Face of Evolving Threat Landscapes	Master Data Management
2:45 PM	4:00 PM	Igniting Creativity: Enhancing Team Participation in Innovation	Bridging Generations: Embracing Younger Voices in Leadership	Recruiting for CAAS	AI in our Profession - Viewpoint from an AI Software Start-up Serving Our Industry	
4:15 PM	5:15 PM	Cultivating Culture: Strategies for Employee Retention	AI in Focus: Tools, Controls, and Privacy in Client Engagement	CAAS Outside of CPA Firms	Strategic Roundtable	Tactical Roundtable
6:30 PM	9:00 PM	Dinner and Party (you don't want to miss this)				

Tuesday, November 5

7:00 AM	8:00 AM	Breakfast				
Tracks & Sessions		Consulting & Reselling (CR)		Client Accounting Services (CAS)	Internal Tech Leaders (ITL)	
		CR TRACK 1	CR TRACK 2	CAS	ITL STRATEGIC	ITL TACTICAL
8:00 AM	9:00 AM	Navigating Pricing in the Subscription Economy	Stewardship in Action: A Leadership Case Study	How do I Compare? Benchmarking Updates from CPA.com	Audit Platforms of the Future	Reporting and Dashboards - Who Owns Them?
9:15 AM	10:15 AM	Leadership Transition: Are You Ready for Ownership Transfer?	Choosing the Right Partner: A Guide to Consulting Firm Selection	Training Future Leaders: What's Next?	The Goldilocks Problem: Finding the right people for your IT team	Data Classification & Implementing Effective Data Loss Prevention (DLP)
10:30 AM	11:30 AM	Tuesday KEYNOTE: Economist Update (more details TBD) by Taylor St Germaine				
11:30 AM	12:30 PM	Lunch				
12:30 PM	1:30 PM	Optimizing Partnerships: Strategies for Success in Go-Live Scenarios	Sales Commissions and Consulting Compensation: Insights for Subscription-Based Firms	The Practice Management Playbook	Data as your Next Superpower	Endpoint Management and Windows 11
1:45 PM	2:45 PM	CR Roundtable		CAS Fireside Chat	Strategic Roundtable	Tactical Roundtable
2:45 PM	3:15 PM	Wrap Up Session - Geni Whitehouse				

Wednesday, November 6

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