Information Technology Alliance Fall 2014 Collaborative

20/20 VISION FOR THE 2020 FIRM

December 7-9, 2014 | Gaylord Resort, National Harbor, MD

ITA

Start	End	CR Track 1	CR Track 2	Large CR Firm (LCR) / Outsourced IT (OIT)	Project Management (PM) / Application Development (AD)	ITL Tactical	ITL Strategic
6:00 PM	10:00 PM	Optional - Monument Tour					
SUNDAY		**DECEMBER 7**					
5:30 AM		Optional - Running					
8:30 AM	12:30 PM	Optional - Topgolf					
3:00 PM	7:00 PM	Registration - Cherry Blossom Lobby					
4:30 PM	5:30 PM	**Opening General Session and Welcome** ITA State of the Association **& Introductions** - Stan Mork - Cherry Blossom Ballroom					
5:30 PM	7:00 PM	Welcome Reception - Cherry Blossom Lobby					
		Dinner On Own and Various Vendor Events					
MONDAY		**DECEMBER 8**					
Tracks		**Consulting & Reselling**		**Special Interest Groups**	**Special Interest Groups**	**Internal Tech Leaders**	
		CR Track 1	**CR Track 2**	**Large CR Firm (LCR)** **Outsourced IT (OIT)**	**Project Management (PM)** **Application Development (AD)**	**ITL Tactical**	**ITL Strategic**
7:00 AM	8:00 AM	Registration - Woodrow Wilson Foyer Full Breakfast - Prince's George's Exhbition Hall					
8:00 AM	9:15 AM	**Maintaining 20/20 Vision Through 2020: The New Small Biz Apps Marketplace** Bob Anderson, Gartner Cherry Blossom Ballroom			**20/20 Vision for the 2020 Firm: Is Your Firm Looking Through Rose Colored Glasses or High Tech Specs?** Rick Pastore, CIO Executive Council Annapolis Rooms		
9:30 AM	10:45 AM	**How to Successfully Transition to a Cloud/Hybrid Model** Annapolis 3-4	**Mergers & Acquisitions & Business Valuation Trends for Consulting Firms** - Cherry Blossom Ballroom		**AD -Team Foundation Server and the SDLC** Magnolia 3	**Office 365 - Is It Ready for Prime Time?** Annapolis 1	**Knowledge Management - A Successful Professional Services Case Study** Annapolis 2
11:00 AM	12:30 PM	**Successful Approaches for Consulting Remotely** Annapolis 3-4	**Firm of the Future Success Stories** Cherry Blossom Ballroom **PM - Beyond Project Management: Why Companies Are Embracing Outcome Management** Crossover CR and ITL Track - Magnolia 2	**LCR - M&A Discussion** Magnolia 1	**PM - Beyond Project Management: Why Companies Are Embracing Outcome Management** Crossover CR and ITL Track Magnolia 2	**Business Intelligence Technologies for the CPA Firm** Annapolis 1	**Watson: Transforming the Meaning of the Intelligent Enterprise** Annapolis 2
12:30 PM	1:45PM	Luncheon - Prince George's Exhbition Hall					
2:00 PM	5:45 PM	**GENERAL SESSION WITH DIGITAL CPA CONFERENCE** - Woodrow Wilson Ballroom 2:15 - 2:45: Navigating the Increasing Complexities of Business and the Profession - Barry Melancon 2:45 - 4:20: What the Current Political, Regulatory and Business Environment Means for the Profession - George Will 4:45 - 5:45: Looking Ahead: What Technology Leaders See on the Horizon - Panel Technology Leaders					
6:00 PM	9:00 PM	Monday Night Event With Digital CPA Conference - Pose Nightclub					
TUESDAY		**DECEMBER 9**					
7:00 AM	8:00 AM	Continental Breakfast With Digital CPA Conference (stand up breakfast) - Cherry Blossom Lobby					
8:00 AM	10:05 AM	**GENERAL SESSION WITH DIGITAL CPA CONFERENCE** - Woodrow Wilson Ballroom 8:00 - 8:25: Advancing the Journey of the Digital CPA and the Role of the Trusted Business Advisor - Eric Asgeirsson 8:25 - 10:05: The Shift to the Cloud and Its Impact on Business and Society - Nicholas Carr					
10:30 AM	12:15 PM	**Vendor Showcase - Envisioning the Future with 20/20 Solutions** Annapolis 3/4	**People Plan: Your Most Important Plan Toward Success** Cherry Blossom Ballroom	**OIT - What's Happening in My Practice** Magnolia 1		**Tactical Roundtables Job Functions** ITA Members Only Annapolis 1	**StrategicRoundtables** ITA Members Only Annapolis 2
12:15 PM	1:30 PM	Luncheon With Digital CPA Conference - Woodrow Wilson Ballroom (plated)					
1:30 PM	2:45 PM	**Building Your Ideal Client Profile** Annapolis 3-4	**Unleashing the Power of Journey Mapping - How Well Do You Know Your Customer's Experience?** Cherry Blossom Ballroom	**ITA Vendor Summit** ITA Vendor Members Only Magnolia 2 **When My Data Is In the Cloud, What Do I Need to Do to Keep It Safe** Crossover CR Oit & ITL Digital CPA Magnolia 1	**AD - SharePoint – Customizations and Innovations** Magnolia 3	**When My Data Is In the Cloud, What Do I Need to Do to Keep It Safe** Crossover CR Oit & ITL Digital CPA Magnolia 1	**Business Relationship Facing Roles and Demand Management Within IT** Annapolis 2
2:55 PM	4:10 PM	**Not All Clients Are Equal - Tools for Performing a Client Needs Assessment** Crossover Digital CPA Annapolis 3-4	**Your Social Marketing Strategy Coming Soon!** Cherry Blossom Ballroom **PM - Project Management Methodology** Crossover CR and ITL Track Magnolia 2	**OIT - What's Coming Up Fast In Your MSP's Rear-View Mirror? Next Gen Models for Security-As-A-Service** Magnolia 1	**PM -Project Management Methodology** Crossover CR and ITL Track Magnolia 2	**Future Direction of Social and Business Communications In Our Firms** Annapolis Room1-2	
4:15 PM	5:00 PM	**Consulting & Reselling Wrap Up** - Cherry Blossom Ballroom			**ITL Wrap Up** - Annapolis 1-2		
5:00 PM		ITA Gathering - Belvedere Bar					

SESSIONS AND SPEAKERS

GENERAL SESSIONS

Monday, December 8

Navigating the Increasing Complexities of Business and the Profession
Room: Woodrow Wilson Ballroom
Barry Melancon, President & CEO - AICPA
Complexity—perhaps no word better describes the opportunities and challenges facing todays accounting and consulting professionals and the clients they serve. It truly is a unique time. Globalization, Big Data, Digitization, Regulation... and the list goes on. Barry Melancon, President and CEO of AICPA, will share his perspective on the key environmental factors shaping the CPA-client relationship and how firms are positioning themselves for success today in order to be tomorrow's Trusted Business Advisors.

What the Current Political, Regulatory, and Business Environment Means for the Accounting and Consulting Professions
Room: Woodrow Wilson Ballroom
George Will, Award Winning Columnist & Author
Followed by a Panel Discussion
Erik Asgeirsson, Moderator, President & CEO – CPA.com, New York, NY
George Will, Award Winning Columnist & Author
Barry Melancon, President & CEO – AICPA
With his unmatched political insight, George Will provides witty, trenchant, and always-informed commentary on politics, the economy, and American society. Mr. Will's incisive and penetrating forecast and analysis of the ''recently-concluded' midterm elections and the ensuing impact on the U.S. business climate will provide context for your firm's planning, as well as offering a glimpse into what the future holds for public affairs, public policy, regulation, and American society. As one of the most respected and sought after political commentators on the national scene, George Will delivers an informed and expert view on the issues impacting our profession.

Looking Ahead: What Technology Leaders See on the Horizon
Room: Woodrow Wilson Ballroom
Greg LaFollette, Moderator, Strategic Advisor – CPA.com
Rene Lacerte, Founder/CEO – Bill.com
Aaron Harris, Chief Technology Officer and Vice President, Engineering – Intacct
Jim McGinnis, Vice President - Intuit
Economics, regulatory standards and technology advancements all influence the direction of your firm and, more importantly, your clients. Come and hear from leaders of some of the top technology companies serving our profession. They'll discuss their vision for the evolution and impact of the technologies we'll be using over the next 5 to 10 years. You'll leave this session prepared to guide your career, your firm, and your clients into the future.

Tuesday, December 9

Advancing the Journey of the Digital CPA and the Role of the Trusted Business Advisor
Room: Woodrow Wilson Ballroom
Erik Asgeirsson, President & CEO - CPA.com
The characteristics of today's digital CPA has evolved from just a few short years ago. Forward thinking firms are transforming processes, workflows, communication methods and business delivery models in an effort to provide higher value client services. Erik Asgeirsson, President and CEO of CPA.com, will discuss the key technology trends impacting firm strategy, client expectations and practitioner mindset all of which best define today's digital CPA.

The Shift to the Cloud and its Impact on Business and Society
Room: Woodrow Wilson Ballroom
Nicholas G. Carr, Pulitzer Prize nominee and author of The Big Switch
Nicholas Carr, author of *The Big Switch*, writes about business, technology, innovation, and culture. Highly-regarded throughout Silicon Valley for his intellectual thinking on the impact of technology, Carr will examine how a revolution in computing is reshaping business and society. He'll also discuss concepts from his newest book, *The Glass Cage*, (scheduled for release in September 2014), in which he explores the impact of automation from a deeply human perspective, examining the personal as well as the economic consequences of our growing dependence on computers.
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Consulting and Reselling (CR) Track

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Maintaining 20/20 Vision Through 2020: The New Small Biz Apps Marketplace
Room: Cherry Blossom Ballroom
Bob Anderson – Gartner, Alpharetta, GA
Bob Anderson from Gartner will speak to the major trends influencing technology today while translating them into the practical impact they'll have on small businesses and the accountants and application solution providers serving them. Along the way, he'll provide a call to action and range of recommendations for those hoping to survive and thrive on their way to 2020. If you're trying to figure out how macro-trends are impacting technology from the cloud to mobility and data to collaboration and just what that means for accountants, publishers and the reseller channel, you won't want to miss this presentation as it sets the tone for the rest of our Fall Collaborative.

How to Successfully Transition to a Cloud/Hybrid Model
Room: Annapolis 3-4
Richard Duffy, Moderator – Acumatica, Kirkland, WA
David M. Cieslak – Arxis Technology, Inc., Simi Valley, CA
John J. Gabrys – Vision Business Solutions, Oak Park, IL
Gary Feldman - I-Business Network, LLC, Marietta, GA
By now you've come to the conclusion that the cloud is not a fad, it's here to stay and in order to remain viable as an organization/consulting firm, you need to embrace the opportunity this technology shift presents. The transformation has an impact on hiring & compensation, marketing, sales process, implementation, and services delivery. Do you form a new company or division? Do you add a cloud solution to your existing portfolio? Do you start with ERP or add-on solutions? Learn from a panel of counterparts who have made a successful transition. At the end of the session, you'll be empowered with a roadmap for starting or continuing the transformation journey.

Mergers & Acquisitions & Business Valuation Trends for Consulting Firms

Room: Cherry Blossom Ballroom

Andrew J. Sherman – Jones Day, Washington, DC Law Firm

There are many changes happening in our industry that are impacting firm growth and profitability such as adding a cloud practice to stay competitive, finding a vertical niche, pressure from software vendors for partners to consolidate, and higher costs of sales and decreases in software margins. With all these changes, owners are wondering if merging or acquiring another firm will provide them a competitive advantage and help lead to faster growth and profitability. Or perhaps, maybe it's just time to sell? What are the advantages and risks of merging with another organization? What are the current valuation approaches for an IT consulting firm? How should an organization prepare itself for sale if the owner is looking to exit? And what should we, as potential buyers, be considering when we look at the acquisition of another firm. Andrew Sherman, M&A Partner specializing in Technology at Jones Day, the #1 ranked M&A firm in the country, will be addressing these issues and other relevant topics.

Successful Approaches for Consulting Remotely

Room: Annapolis 3-4

Facilitated Discussion, Workshop/Roundtables
Kevin M. Martin – Martin & Associates, Cincinnati, OH
Neil Wainwright – Nexonia, Toronto, ON, Canada

After completing this course you will:

- Have a list of best practices on how to run successful remote engagements
- For example
    - Understand the mindset of the remote client
    - Know when to travel and when not to
    - Understand the tools to support remote engagements
        - Project management
        - Collaboration
        - Recording keeping
        - Task management

Firm of the Future Success Stories

Room: Cherry Blossom Ballroom

Ed Kless, Moderator – Sage, Allen TX
Gary C. Crouch – CS3 Technology, Tulsa, OK
Dominic Pernai – Cornerstone Solutions, Chicago, IL
Wayne Schulz – DSD Business Systems, Glastonbury, CT

Are you a Firm of the Future wannabe? It takes a commitment to fixed pricing, money back guarantees, and timesheet obsolescence! But who can do it? We've found several of your very own ITA peers who've made the leap! Come hear how they did it! To many professionals, becoming a Firm of the Future holds great intellectual appeal but appears as an insurmountable business model change. The idea seems to threaten the entire professional service culture for both the provider and the client. Instead of another thought leader exclaiming the benefits and minimizing the risks of a leap to Firm of the Future processes, we need encouragement and "been there, done that" best practices from peers who've successfully converted to the model. We've designed this session to provide nothing but real world stories from the front lines of the war against the billable hour! You will learn to:

- List the minimum requirements for the Firm of the Future business model
- Determine the benefits from doing business as a Firm of the Future
- Anticipate the costs associated with adopting the Firm of the Future business model
- Understand how successful Firms of the Future react to client reluctance to the model
- Plan for internal objections to becoming a Firm of the Future before they occur

Beyond Project Management…Why Companies Are Embracing Outcome Management – JOINT CR/ITL SESSION

Project Management SIG

Room: Magnolia 2

Laura Dribin – Peritius Consulting, Inc., Chicago, IL

As the market has matured, many businesses have commoditized Project Management. Success in managing initiatives, both large and small, is not wholly contingent on maintaining timelines and budget, but also on ensuring a quality result. What does that mean? Managing to a positive outcome. Completing a project and delivering the desired outcome are often two different things. Addressing outcomes creates a focus on implementation AND adoption. It puts leadership on the hook to deliver both project management AND change management. In this presentation Laura Dribin, Peritius Consulting, will define Outcome Management and describe why it is imperative to evolve your organization beyond project management mentalities in order to achieve your firm's strategic vision. You will learn how to improve your returns by focusing and prioritizing outcomes when managing the delivery of any initiative within your organization. She will outline some common myths in project delivery and provide some tips to help you to be a change agent in moving your organization towards an outcome-based focus. This focus can be used both in defining and managing the success metrics of projects in your organization.

Tuesday, December 9

General Session - Advancing the Journey of the Digital CPA and the Role of the Trusted Business Advisor
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Vendor Showcase - Envisioning the Future with 20/20 Solutions
Room: Annapolis 3-4

April Blankenship (Moderator) – Altec, Laguna Hills, CA
David Appel – NetSuite, San Mateo, CA
Chris Farrell – Tallie, San Francisco, CA
Matthew Kantelis – Avalara, Irvine, CA
Sean Meacham – HighJump Software (Accellos), Colorado Springs, CO
Richard Simmons – Altec, Laguna Hills, CA
Neil Wainwright – Nexonia, Toronto, ON, Canada

Join us for Round 2 of vendor expertise! Set your sights on the *SIX* ITA vendor members who will present to you (in just 12 minutes each) how adding their solution to your portfolio will make you a "Firm of the Future" starting today. Looking forward toward success is better than regretful hindsight so learn how to generate additional revenue while providing sustaining value to your team by hearing from experts from HighJump Software (Accellos), Altec, Avalara, NetSuite, Nexonia and Tallie. Their solutions will make it clearer for your business how to equip itself to fulfill its purpose and vision in the years to come.

People Plan: Your Most Important Plan Toward Success
Room: Cherry Blossom Ballroom

Jennifer L. Wilson – ConvergenceCoaching, LLC, Bellevue, NE

For years, finding and retaining the right people has been a top priority for both consulting and accounting firms. The sustainability of our industry depends not only on our ability to attract and retain top talent, but also to advance that talent within the organization. Regardless of size, succession planning is critical for any firm and holding on to your best talent has never been so important. We all know the cost of replacing lost talent far exceeds the cost of retaining talent. Adding to the complexity of defining competitive compensation models for employees, firms must now factor in value price billing, cloud/subscription and new time/place working models. In this session, you'll learn the key ingredients to create a "people plan" that will enable you to attract top talent, keep your best staff satisfied and create a positive culture that employees believe is unique to your firm. After completing this course you will be able to:

- Understand what is required to attract and retain top talent
- Develop a "people plan" to keep you best staff satisfied
- Create a unique positive culture for your firm
- Understand what is required to develop a competitive employee compensation plan

Building Your Ideal Client Profile
Room: Annapolis 3-4

Presentations with Roundtables
Bryan L. Wilton - InterDyn BMI, Houston, TX
Stuart Tholen - Eide Bailly, Ogden UT
David Appel - NetSuite, San Mateo, CA
Neil Wainwright - Nexonia, Toronto, ON, Canada

A common theme in conversations at ITA is figuring out 'what makes my firm unique'. Come learn, or refresh, your brand and sales approach to honing in on the prospects where you have best chance of earning their business and having a successful implementation. As a group, we are going to debate, build, and vote upon the key metrics of profiling your ideal client, leveraging what all of us have learned over time, plus some new hot current trends in the industry. After completing this class, you will be able to:

- Focus upon your ideal client profile with a one-page worksheet
- Speed your qualification of new opportunities to ones where you have the best chance of winning
- Know how to disengage from clients you no longer wish to manage

Unleashing the Power of Journey Mapping - How Well Do You Know Your Customer's Experience?
Room: Cherry Blossom Ballroom

Workshop with Roundtable Discussion and Personal Take Aways
Charlie Colquhoun, Sage – Irvine, CA
David Shaw, Sage – Irvine, CA

Get a taste of a revolutionary tool to understand your customer's experience, and its connection to your brand. In this session, you will learn how to use a unique process called Journey Mapping to identify issues affecting your customer's journey. You will identify specific actions you can take to improve your customer's journey. You will be able to take your Journey Mapping poster home with you to educate your key stakeholders within your organization to drive action. Most importantly, you will also be able to use this tool as a conversation piece to collect valuable feedback from your customers.

Not All Clients Are Equal: Tools for Performing a Client Needs Assessment
Room: Annapolis 3-4

Mike Nafziger – McGladrey LLP, Minneapolis, MN
Gordon Opland – McGladrey LLP, Des Moines, IA

Before drafting the engagement letter, make sure you perform a client needs assessment to understand the strengths and weaknesses of clients. Performing a needs assessment will give you a look into the value you can provide to your client. Your client can then see the impact your services will have. So how do you do this efficiently? In this session, you will receive tips, processes and tools to use in performing an effective client needs assessment. Why recreate the wheel when others have established a structure for you? Reap the knowledge and experience of those who have already "been there and done that."

Your Social Marketing Strategy Coming Soon!
Room: Cherry Blossom Ballroom

Walter Goodfield, Moderator - RKL eSolutions LLC, Mentor OH
Philip Massey – Massey Consulting, Inc., Raleigh, NC
Mark Severance – Arxis Technology, Inc. Simi Valley, CA
Brian Terrell - BTerrell Group, LLP, Dallas, TX

The dynamics of Social Marketing are rapidly evolving. Today's buyers are self-educating themselves, already knowing 80% of what they need to make a buying decision. This collaborative session will briefly explore the platforms available, present ideas and examples to optimize or launch your strategy, and deliver tactical best practices. Attendees will:

- Learn how to manage time and content
- Realize how to identify the content gold in every client conversation,
- Learn how to demonstrate subject matter expertise by leveraging what others publish.

Project Management Implementation Methodology
Project Management SIG
Room: Magnolia 2

Diane Grayson – Grayson Solutions, Issaquah, WA

Large Consulting & Reselling Firms – Special Interest Group Sessions (LCR)

Monday, December 8

General Session - Navigating the Increasing Complexities of Business and the Profession
Room: Woodrow Wilson Ballroom

Barry Melancon, President & CEO - AICPA

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Maintaining 20/20 Vision Through 2020: The New Small Biz Apps Marketplace
Room: Cherry Blossom Ballroom

Bob Anderson – Gartner, Alpharetta, GA

We know that our business has changed considerably in the last 5 years and there is no indication that the industry won't continue to evolve. Hear from Gartner's SMB ERP analyst Bob Anderson in a facilitated discussion about how he sees the IT business application consulting and VAR business changing and what successful firms will need to do to remain competitive.

Mergers & Acquisitions & Business Valuation Trends for Consulting Firms
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M&A Roundtable Discussion
Room: Magnolia 1

Facilitated Discussion: Stuart Tholen - Eide Bailly, Ogden UT

Following Andrew Sherman's M&A session with the full CR group, Andrew will be joining the Large CR firms for a more in-depth, facilitated discussion regarding, merger and acquisition strategies for our large CR firms. Come to this session with your questions and discussion topics, whether it be regarding buying or selling a practice or valuing a practice and join in a lively discussion on this topic.

Outsourced IT – Special Interest Group Sessions (OIT)

Tuesday, December 9

General Session - Advancing the Journey of the Digital CPA and the Role of the Trusted Business Advisor
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General Session - The Shift to the Cloud and its Impact on Business and Society
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What's Happening in My Practice?
Room: Magnolia 1
Facilitated Discussion
Join Outsourced IT practice leaders to talk about the things that matter most: growth opportunities, profit centers, and best practices. Participants should come prepared to share information about innovations that have allowed you to win a client or develop a new service, pain points in your practice where you would welcome a second opinion or solution, and the #1 win that you achieved since we last met.

When My Data Is In the Cloud, What Do I Need to Do to Keep It Safe?
Room: Magnolia 1
John Rodenbiker – Eide Bailly LLP, Fargo, ND
Jeffrey Zalusky – CliftonLarsonAllen LLP, Calverton, MD
When your data is in the Cloud, you have the resources of specialized companies building systems to protect your data. So what is your responsibility? This session will provide understanding on what the SOC certification logo says about the company, what you need to do to secure data when transmitting to the cloud, how to protect your communications with clients, tips to share with clients and risk management techniques you should employ.

What's Coming Up Fast In Your MSP's Rear-View Mirror? Next Gen Models for Security-As-A-Service
Room: Magnolia 1
Dan Druker – Zscaler, Inc.
The world of IT security is undergoing tremendous change. The unstoppable momentum of the Internet and cloud computing, the ubiquity of mobile devices and the increasing threats from sophisticated, well-funded, cyber-criminal organizations and governments have together turned the IT security landscape upside down. So what can you do today to keep your security ahead of these trends, as well as embrace the opportunity this change creates? Dan Druker from Zscaler, Inc. will lead us in a discussion about cloud based security offerings and share some of the latest security insights they have mined from inspecting more than one trillion Internet transactions. Learn how you can expand your security offering beyond perimeter protection to address the next generation of security challenges.

Internal Tech Leaders (ITL) Track – Tactical & Special Interest Groups (SIG)

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General Session - Looking Ahead: What Technology Leaders See on the Horizon
Room: Woodrow Wilson Ballroom

Greg LaFollette, Moderator, Strategic Advisor – CPA.com
Rene Lacerte, Founder/CEO – Bill.com
Aaron Harris, Chief Technology Officer and Vice President, Engineering – Intacct
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Economics, regulatory standards and technology advancements all influence the direction of your firm and, more importantly, your clients. Come and hear from leaders of some of the top technology companies serving our profession. They'll discuss their vision for the evolution and impact of the technologies we'll be using over the next 5 to 10 years. You'll leave this session prepared to guide your career, your firm, and your clients into the future.

20/20 Vision for the 2020 Firm: Is Your Firm Looking Through Rose Colored Glasses or High Tech Specs?
Room: Annapolis Rooms

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At some point in the foreseeable future, Accounting, like all other business services, will be reshaped by the digital business environment, disrupted by social, mobile, big data analytics and/or cloud. To be a victor rather than a victim of this upheaval, executive leadership teams must be "digitally ready" to innovate and compete. Yet, research shows that most C-suites are lacking in critical competencies such as digital vision and literacy, future-focus, mutual decision-making and an accelerated process for innovation. It's a perfect opportunity for CIOs to step forward as digital guides and coaches for the executive team—those that don't risk being sidelined.

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Team Foundation Server and the SDLC
Applications / Development SIG
Room: Magnolia 3

Steve Heath – McGladrey, Minneapolis, MN
Justin Kadeshuk – MNP LLP, Calgary, AB, Canada
Eric Merkle – BDO USA, LLP, Grand Rapids, MI
Stephen Osmond – MNP LLP, Calgary, AB, Canada

Microsoft Team Foundation Server is being used in some capacity by most member firm's development groups already, but offers tools and patterns to support a variety of approaches to a group's software development lifecycle. In this session we will have member firms present how they leverage the tool, specific configurations for agile methodologies and what their resulting lifecycle process looks like. The session will also afford time for questions and open discussion between participants and attendees.

Office 365 – Is it Ready for Prime Time?

Room: Annapolis 1

Facilitated Discussion

Ferla Geckin – Microsoft, Chevy Chase, MD

This is a Microsoft led session that is NOT a Microsoft sales pitch. Participants will learn if Office 365 is ready for primetime in our specific business. Microsoft will share their success stories and failures related to deploying Office 365. Microsoft will explain the implementation benefits with Cloud and Hybrid deployment models. After completing this session you will better understand:

- The delivery models – Hosted, Standard, Office 365 ProPlus
- The differences between current On-Premise environment vs. Office 365 ProPlus
- Legal concerns with Office 365
- How to create a business case for Office 365
- How Office 365 ProPlus is licensed by user and the benefits (up to 5 PCs/Macs and 5 Tablets)
- How Office 365 ProPlus allows you to edit documents with your iPad
- The network infrastructure and laptop security requirements

Beyond Project Management…Why Companies Are Embracing Outcome Management

Project Management SIG

Room: Magnolia 2

Laura Dribin – Peritius Consulting, Chicago, IL

As the market has matured, many businesses have commoditized Project Management. Success in managing initiatives, both large and small, is not wholly contingent on maintaining timelines and budget, but also on ensuring a quality result. What does that mean? Managing to a positive outcome. Completing a project and delivering the desired outcome are often two different things. Addressing outcomes creates a focus on implementation AND adoption. It puts leadership on the hook to deliver both project management AND change management. In this presentation Laura Dribin, Peritius Consulting, will define Outcome Management and describe why it is imperative to evolve your organization beyond project management mentalities in order to achieve your firm's strategic vision. You will learn how to improve your returns by focusing and prioritizing outcomes when managing the delivery of any initiative within your organization. She will outline some common myths in project delivery and provide some tips to help you to be a change agent in moving your organization towards an outcome-based focus. This focus can be used both in defining and managing the success metrics of projects in your organization.

Business Intelligence Technologies for the CPA Firm

Room: Annapolis 1

Susie Cheeney – McGladrey, Davenport, IA

Jeff Clark – BDO USA, LLP, Grand Rapids, MI

Others TBD

Business Intelligence reporting, visualization and analytic tools are intended to help an organization reach well-defined business objectives. Many organizations have either implemented or are implementing business intelligence solutions with varying degrees of success. In addition, the landscape of available business intelligence visualization and analytic tools is rapidly changing with the introduction of new tools and cloud-based solutions such as GoodData, Birst, Tableau and Qlik. Session participants will hear from 4 firms who have undertaken business intelligence implementations along with what newer BI tools they may be considering, lessons learned, and traps to avoid. After completing this session you will be able to:

- List what BI visualization and analytic tools are being used or considered by peer firms.
- Identify miss-steps and traps to avoid with your own BI implementation efforts.
- Apply lessons learned to your own evaluation of business intelligence tools.
- Improve the organizational impact of your business intelligence efforts and increase user satisfaction.

Tuesday, December 9

General Session - Advancing the Journey of the Digital CPA and the Role of the Trusted Business Advisor

Room: Woodrow Wilson Ballroom

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The characteristics of today's digital CPA has evolved from just a few short years ago. Forward thinking firms are transforming processes, workflows, communication methods and business delivery models in an effort to provide higher value client services. Erik Asgeirsson, President and CEO of CPA.com, will discuss the key technology trends impacting firm strategy, client expectations and practitioner mindset all of which best define today's digital CPA.

General Session - The Shift to the Cloud and its Impact on Business and Society

Room: Woodrow Wilson Ballroom

Nicholas G. Carr, Pulitzer Prize nominee and author of The Big Switch

Nicholas Carr, author of *The Big Switch*, writes about business, technology, innovation, and culture. Highly-regarded throughout Silicon Valley for his intellectual thinking on the impact of technology, Carr will examine how a revolution in computing is reshaping business and society. He'll also discuss concepts from his newest book, *The Glass Cage*, (scheduled for release in September 2014), in which he explores the impact of automation from a deeply human perspective, examining the personal as well as the economic consequences of our growing dependence on computers.

Tactical Roundtables - Job Functions

Room: Annapolis 1

Applications: Patrick Powers – Crowe Horwath LLP, South Bend, IN
Applications/Development: Casey Root, Rehmann, Saginaw, MI
Infrastructure & Client Devices: Scott Newcomer, Crowe Horwath LLP, South Bend, IN
Project Management: Kathleen Fluke, Crowe Horwath LLP, Indianapolis, IN
Security & Compliance: Rex Voorhees, Crowe Horwath LLP, South Bend, IN
Support/Service Desk: Pamela Mahoney, Baker Tilly, Philadelphia, PA

Please join this roundtable session for an open-forum discussion of any and all topics of interest to the group. Suggested items include: upcoming projects, recent successes, current problems, vendor issues, and questions for other members. We will be seating people based upon areas of responsibility. Each discussion leader has developed a set of issues for the group to select from.

SharePoint – Customizations and Innovations

Applications / Development SIG

Room: Magnolia 3

Kevin Guyer, Moderator – Cherry Bekaert LLP, Richmond VA
Julian Benjamin – Marcum LLP, Melville, NY
Patrick Powers – Crowe Horwath LLP, South Bend, IN

Everybody is using SharePoint's flexible platform to deliver information and solutions. In this session we will explore what some teams are doing to extend and innovate on that platform to address their business needs. Join us as member firms present case studies for problems that they tackled in SharePoint using internally developed solutions and 3rd party tools. Some of the topics to be covered will include implementing asynchronous extensions using SharePoint web services, custom workflows and accessing some SharePoint assets directly from the database.

When My Data Is In the Cloud, What Do I Need to Do to Keep It Safe?

Room: Magnolia 1

John Rodenbiker – Eide Bailly LLP, Fargo, ND
Jeffrey Zalusky – CliftonLarsonAllen LLP, Calverton, MD

When your data is in the Cloud, you have the resources of specialized companies building systems to protect your data. So what is your responsibility? This session will provide understanding on what the SOC certification logo says about the company, what you need to do to secure data when transmitting to the cloud, how to protect your communications with clients, tips to share with clients and risk management techniques you should employ.

Project Management Implementation Methodology

Project Management SIG

Room: Magnolia 2

Diane Grayson – Grayson Solutions, Issaquah, WA

Future Direction of Social and Business Communications in our Firms

Room: Annapolis 1-2

John Bowles – Dixon Hughes Goodman LLP, Hendersonville, NC
Rich Rottman – BDO USA, LLP, Grand Rapids, MI
Alex Gasick – Tahoe Partners, Chicago, IL

We've been watching how social media has revolutionized the way we connect and communicate in our personal lives. This momentum, coupled with the desire to work more virtually and increase collaboration across our firms, should make this a slam dunk, right? Several of us have struggled to figure out how to deploy an enterprise social network with the same impact. At this session, we'll showcase 2 firms that have implemented social networks and hear both their successes and challenges. We'll follow with an outside speaker, Tahoe Partners, that will provide best practices from their implementation experience and a glimpse of what social media and business communications look like in the future. Lastly, we'll wrap up with a panel Q&A where you'll have a chance to ask the burning questions that are on your mind.

Internal Tech Leaders (ITL) Track - Strategic

Monday, December 8

General Session - Navigating the Increasing Complexities of Business and the Profession
Room: Woodrow Wilson Ballroom

Barry Melancon, President & CEO - AICPA

Complexity—perhaps no word better describes the opportunities and challenges facing todays accounting and consulting professionals and the clients they serve. It truly is a unique time. Globalization, Big Data, Digitization, Regulation... and the list goes on. Barry Melancon, President and CEO of AICPA, will share his perspective on the key environmental factors shaping the CPA-client relationship and how firms are positioning themselves for success today in order to be tomorrow's Trusted Business Advisors.

General Session - What the Current Political, Regulatory, and Business Environment Means for the Accounting and Consulting Professions
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Knowledge Management - A Successful Professional Services Case Study

Room: Annapolis 2

Oz Benamram, Chief Knowledge Officer (CKO) of White & Case, NYC Law Firm
Tony S. Cordeiro – White & Case, NYC Law Firm
Ron Friedman – Fireman & Company, Washington, DC
David L. Holyoak – Grant Thornton LLP, Oakbrook Terrace, IL
Peter J. Scavuzzo – Marcum LLP, Melville, NY

Why has Knowledge Management (KM) been so elusive to the Accounting industry? KM is clearly a process that our Firms would like to Master. But where do we get started, how do we take it to the next step, and how do we master it. To answer these questions we have brought in an expert from the legal industry that has mastered the art of KM in his Firm. He will share his success story and through example provide us with some key take a ways that can be leveraged immediately with our Firms. He will additionally provide some tips on gaining more support and investment from the business into improving the KM process. Additionally, as a second part to this session our KM expert will facilitate a panel discussion between a CIO of an Accounting Firm and a CIO of a Law Firm having them each share from their perspective how they view the success of KM in their Firm and more importantly how they feel the Executive team views the value and success of a KM program.

After attending this session you will be able to:

- More clearly recognize how KM can provide value for an organization
- Have a clear understanding from a KM expert on steps it takes to create a successful KM Program
- Walk away with examples and tips to improve the efforts you are currently making with KM
- Recognize how KM can provide value for an organization
- Insight on how to accelerate business investment in KM

Watson: Transforming the Meaning of the Intelligent Enterprise

Room: Annapolis 2

Rich Holada – IBM Watson Transformations, Durham, NC

We have all heard about disruptive technologies, those that move beyond improving what already exists to creating entirely new categories of capabilities. IBM's Watson is one of those technologies. Watson, or Artificial Intelligence, is rapidly evolving from the theoretical to the practical. In this session, a member of IBM's Transformations team will provide us with an overview of Watson, its key capabilities, and how their application in the Accounting industry may have transformational impacts on the operating models of our firms. After completing this session, participants will be able to:

- Articulate the key capabilities delivered by Artificial Intelligence and its potential impact on professional services
- Plan for a future technology and business landscape that includes broader adoption of Artificial Intelligence

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Strategic Roundtables

Room: Annapolis 2

Below are topics for table discussion. As always, you can add your own table topics. We will ask that each firm comment on what they would want to know about the topics and what they could provide in terms of expertise. Robust discussion is always encouraged! Topics include:

- Have you been able to facilitate a discussion with your firm on what a "digital firm" may look like in 2020? If not, what other approaches have you taken to start to introduce some of the technologies we talked about in Day 1?
- How do you see IBM Watson type solutions applied to real processes or pain points in our profession?
- What technologies do you see playing an important role in the 2020 Firm that we didn't talk about in Day 1?
- Do we see digital disruption happening in our profession? Incremental or big bang?
- Are you exploring Office 365 and how is it going? Do management teams have a concern with "the cloud" in general?
- What's keeping you up at night right now (follow-on discussion with how others have addressed it)?

Business Relationship Facing Roles and Demand Management Within IT

Room: Annapolis 2

Yvonne Scott – Crowe Horwath LLP, Chicago, IL
Jeff Clark – BDO USA, LLP, Grand Rapids, MI
Michael Connell – CliftonLarsonAllen, LLP, Middleton, WI

The role of business relationship manager within IT has come in and out of favor over the years but has recently experienced a strong resurgence. Business demand management and success is increasingly dependent on effective integration with IT. In this session we will explore what peer firms are doing to successfully fulfill this important role along with related demand management needs. Firms will provide examples whereby IT has taken non typical IT roles with the business, as well as staff outside of IT taken on roles that are extension to what IT typically does. After completing this course you will be able to:

- List what peer firms are doing to fulfill this important role.
- Associate the relationship between this role and effective demand management.
- Differentiate between successful and unsuccessful approaches to business relationship and demand management at a CPA firm.
- Apply lessons learned to establish an effective business relationship and demand management approach at your firm.

Future Direction of Social and Business Communications in our Firms

Room: Annapolis 1-2

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Rich Rottman – BDO USA, LLP, Grand Rapids, MI
Mike Davidson – Tahoe Partners, Chicago, IL
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Other Educational Activities

Meet-up, Greet-up, Tweet-up
Sunday -3:00-4:30 During Registration

New to ITA? New to Social Media? Consider yourself a veteran at one or both? Please join us during registration in the foyer for a chance to connect with other members in person, expand your social network, and get advice from social savvy experts. Bring your iPhones, iPads, Droids, laptops (and all your questions)! We'll have helpers to get you connected on LinkedIn, Chirping on Twitter, Friendly on Facebook, in Google+ inner circle, and sharing knowledge on ITA OnLine. We'll also get new members plugged in before the Collaborative kicks off! No need to register, just stop by!

NASBA Registry Information

Credit Hours: Up to 16 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: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and IT Client Infrastructure & Managed Services Consulting. 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.

Fields of Study May Include:
Business Management and Organization
Finance
Management Advisory Services
Marketing
Communications
Personal Development
Personnel/HR
Computer Science
Statistics

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.learningmarket.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, 23940 N. 73rd Place, Scottsdale, AZ 85255-3425, Telephone (480) 515-2003.