



# ITA FALL COLLABORATIVE

CORRALLING IDEAS FOR YOUR SUCCESS!

NOVEMBER 5-7, 2006 - SAN ANTONIO, TEXAS

Sunday	
4:00 PM - 10:00 PM	Registration
5:30 PM - 7:30 PM	Keynote - The Mountain Makes the Team with Paul Piana (San Antonio A, B & C)
7:30 PM - 10:00 PM	Reception & Vendor/Partner Displays - After the Keynote, begin your networking at this event with your beverages and food stations which will be open in the room throughout the evening. (San Antonio D, E & F)

Monday						
5 Tracks	TRACK 1 Reselling & Consulting (R&C) (San Antonio C)	TRACK 2 Reselling & Consulting (R&C) (San Antonio B)	TRACK 3 IT Consulting (ITC) (San Antonio A)	TRACK 4 Internal Tech Leaders (ITL) (San Miguel A)	TRACK 5 Internal Tech Leaders (ITL) (San Miguel B)	
7:00 AM - 7:50 AM	Breakfast & Vendor Displays (San Antonio B & C)					
7:50 AM - 8:50 AM	From Fighting the Storm to Dancing in the Rain with Ed Robinson (San Antonio A, B & C)			CIO Roundtable - Status Updates (Part 1)	Tech Team Roundtable - Status Updates (Part 1)	
9:20 AM - 10:35 AM	Valuation of a VAR Practice	Developing Leaders by Coaching and Mentoring for Success	Network Assessment Tools	CIO Roundtable - Status Updates (Part 2)	Tech Team Roundtable - Status Updates (Part 2)	
10:45 AM - 12:15 PM	The Real Details Involved in a Merger/Acquisition	The Project Manager Position	IT Consulting Practices: The Specifics	ECM Vendor Updates (San Gabriel) ECM = Enterprise Content Management 10:45 AM - 11:30 AM - Interwoven 11:30 AM - 12:15 PM Hummingbird (Open Text Corp.)		
12:15 PM - 2:00 PM	Luncheon and Open Time for Visiting Displays and Networking (San Antonio D, E & F)					
2:00 PM - 3:00 PM	Capitalizing on Business Productivity Software in this Changing Business Environment	The ITA Project Management Initiative Update	The Potential of VoIP: What Impact Will it Have on Your Business?	1:45 PM - 3:00 PM Microsoft Sharepoint and Office Roadmap Update (San Gabriel)		
3:15 PM - 4:30 PM	WOWs - Highlights of Success	SOX Compliance for Small and Mid-sized Businesses and for Subsidiaries	How to Build and Manage a Profitable IT Managed Services Practice	ECM - Real World Business Cases (San Gabriel)		
4:45 PM - 5:40 PM	ITA Business Meeting (San Antonio A & B)			ECM Compliance Overview	Tools and Policies We Use to be Compliant (Facilitated Roundtable Discussion)	
6:00 PM - 11:00 PM	An Evening at Enchanted Springs Ranch. Experience a real working ranch that is also used frequently as a movie/video set. Roam the Texas town sets, take a wagon ride to see their animals, have your picture taken with Woodrow (a longhorn), feed the animals in the Corral, and more! The Almost Patsy Cline Band will entertain us all evening. After dinner: line dancing and a fast draw contest! Lots of fun, lots of good food, and of course your favorite beverages! Don't forget your western garb! You'll fit right in!					

Tuesday					
7:00 AM - 8:15 AM	Breakfast & Vendor Partner Displays (San Antonio D, E & F)				
8:15 AM - 9:10 AM	Value Pricing's Impact on Commission & Compensation Structures	Purpose Built Text Services Practice Management Software (San Antonio A & B) Autotask Corporation		IT Security - Where Is The Pain? (Facilitated Roundtable Discussion)	ECM - Document Retention and Destruction at the Desktop
9:20 AM - 11:15 AM	9:20 AM - 10:15 AM Business Intelligence (BI) Made Simple 10:20 AM - 11:15 AM BI The Full Suite - Business Objects	9:20 AM - 11:00 AM Succession Planning: Preparing Your Firm to Run Without You	9:20 AM - 10:15 AM Remote Security - Fortinet 10:20 AM - 11:15 AM MS-Based VoIP System - Vonexus	9:20 AM - 11:00 AM Project Planning, Management and Control	9:20 AM - 11:00 AM IT Security (Facilitated Roundtable Discussion)
11:20 AM - 12:35 PM	The BI Practice - A Real World Look at What It Might Require	Budgeting & Forecasting	Remote Managed Services Zenith Information Technology	Metrics and Benchmarking Round 2 (for ITA ITL Members Only)	Storage Requirements (Facilitated Roundtable Discussion)
12:35 PM - 1:45 PM	LUNCHEON				
1:45 PM - 2:45 PM	Knowledge Increases In Value When It Is Shared (San Antonio A & B) (Roundtable Discussions on a Variety of Topics)			Managing IT Value Perceptions	Telecom Landscapes (MPLS-VPN-Metro Ethernet) (Facilitated Discussion)
2:45 PM - 3:45 PM	Knowledge Increases In Value When It Is Shared (San Antonio A & B) (Roundtable Discussions on a Variety of Topics)			ITL Next Meeting Planning (San Gabriel)	
3:45 PM - 4:30 PM	Collaborative Wrap-Up				



# ITA FALL COLLABORATIVE

CORRALLING IDEAS FOR YOUR SUCCESS!

# AGENDA

NOVEMBER 5-7, 2006 - SAN ANTONIO, TEXAS

## Sunday, November 5, 2006

4:00<sup>PM</sup>-10:00<sup>PM</sup>

### Registration

5:30<sup>PM</sup>-7:30<sup>PM</sup>

### General Session

6:00<sup>PM</sup>-7:30<sup>PM</sup>

### Keynote: The Mountain Makes the Team

Paul Piana, mountain climber, author, and highly regarded speaker, is one of the most accomplished "free ascent" climbers in the world. He specializes in first ascent climbs, creating strategies for summits never before achieved. In his presentation "The Mountain Makes the Team" Paul relates how Team Spirit and Determination can overcome the adversities of altitude, extreme weather, and unknown terrain. Paul's experiences on the mountain form striking parallels to the challenges encountered everyday in the business world. Paul recognizes, and wants you to recognize, that the greatest risks and the greatest opportunities often stand side by side, and that the only chance you get, is the chance you take.

**Paul Piana** - Extreme Connection

7:30<sup>PM</sup>-10:00<sup>PM</sup>

### Welcoming Party

Reception, Food, Networking & Displays!

## Monday, November 6, 2006

7:00<sup>AM</sup>-7:50<sup>AM</sup>

### Breakfast & Vendor Displays

7:50<sup>AM</sup>-8:50<sup>AM</sup>

### Consulting: From Fighting the Storm to Dancing in the Rain

Change is guaranteed; progress is not. As we mature as professionals it becomes imperative to master the behavior aspects affecting our organizations. Our role as professionals must also evolve to keep pace with the changes in our world. This program focuses on ways to cope, survive and thrive through the myriad of changes we experience every day, as well as how it affects those around us. The program will also share practical suggestions necessary for us to add value to the organizations we serve.

**Ed Robinson** - Ed Robinson Seminars

7:50<sup>AM</sup>-8:50<sup>AM</sup>

### ITL: CIO Roundtables - Status Updates (Part 1)

This roundtable format session is designed to allow Internal Technology Leaders (ITLs) to share ideas, ask questions, and learn from other technology leaders in the accounting profession. Each participant should come prepared to share, with their assigned group, five or six talking points related to key technology initiatives, challenges or concerns in their organizations. We plan to have two or three separate roundtables going at once, each with seven or eight participants, with each participant being given 15 minutes to present and answer questions. This process almost always results in participants gaining new insight into many of their own current initiatives, challenges or concerns.

**John Bowles (Facilitator)** - Dixon Hughes PLLC

7:50<sup>AM</sup>-8:50<sup>AM</sup>

### ITL: Tech Team Roundtables - Status Updates (Part 1)

This session will build on previous meeting tech team sessions and will bring all participants up to date on

the key projects and initiatives member firms are undertaking. Each participant will have about 15 minutes to informally report on what they are working on. Q&A happens interactively.

**Doug Erickson (Facilitator)** - Wipfli LLP

9:20<sup>AM</sup>-10:35<sup>AM</sup>

### R&C: Valuation of a VAR Practice

In part one of a two-part session on successfully buying, or selling, or even merging your practice, we will discuss the financial aspects of the various deal structure options. How do you establish the valuation(s), and construct the operating pro-formas? Should you use a multiple of EBITDA, or of sales? Or should you just buy or sell the client list? What forms of consideration should you use (cash, stock, note, etc.) and over what time frames? What about employment contracts? Paul Dippell, CEO of Service Leadership, Inc. ([www.service-leadership.com](http://www.service-leadership.com)), a specialist firm in IT Solution Provider mergers, acquisitions and management consulting, will share his experience and insights for you to take back and apply to your merger or acquisition opportunities.

**Paul Dippell** - Service Leadership Incorporated

9:20<sup>AM</sup>-10:35<sup>AM</sup>

### R&C: Developing Leaders by Coaching and Mentoring for Success

Leaders of today accomplish more objectives with greater results at a faster pace than ever before. In doing so the leader is called upon to set up a climate within the work group to encourage others to produce. This program helps leaders understand the key activities as coaches and mentors that are needed to produce high payoffs with little or no expense. Through coaching and mentoring we help others increase their knowledge, skills and contributions.

**Ed Robinson** - Ed Robinson Seminars

9:20<sup>AM</sup>-10:35<sup>AM</sup>

### ITC: Network Assessment Tools

Have you heard of the Microsoft Assessment and Deployment Solution (ADS) built by the Microsoft's Solution Accelerators Core Engineering Team? ADS is a suite of powerful tools designed to help SMB partners assess network assets, generate proposal and planning documents, and automate server deployments for midsize businesses and organizations. Attend this session and hear from Baldwin Ng, Product Manager at Microsoft, other great no-cost solution accelerators that will become available for IT professionals in the next 12 months to support products such as Longhorn Server, Office 2007, Sharepoint 2007. As a bonus, Baldwin will provide a sneak preview of the Windows Vista Readiness Assessment that his team is working on.

**Baldwin Ng** - Microsoft

9:20<sup>AM</sup>-10:35<sup>AM</sup>

### ITL: CIO Roundtables - Status Updates (Part 2)

This is a continuation of the process started in Part 1 and described earlier.

**John Bowles (Facilitator)** - Dixon Hughes PLLC

9:20<sup>AM</sup>-10:35<sup>AM</sup>

**ITL: Tech Team Roundtables - Status Updates (Part 2)**

This session continues the first session and brings all participants up to date on key projects and initiatives member firms are undertaking.

**Doug Erickson (Facilitator)** - Wipfli LLP

10:45<sup>AM</sup>-12:15<sup>PM</sup>

**R&C: The Real Details Involved in a Merger / Acquisition**

In part two of our discussions on buying, selling, or merging practices, a panel of ITA members will discuss their experiences with the various non-financial factors (culture, systems, comp plans, benefit plans, work-life policies, etc), which play an instrumental part in the future success of the new practice. Learn from their recent experiences, successes and challenges, and know what to look for, and what you might do, before you get surprised. It ain't easy, but it has it's benefits!

**Douglas S. Deane (Moderator)** - DSD Business Systems

**Robert Muir** - ERG an MIS Group Company

**Dean Northey** - BCS...ProSoft

**Vera Margarita** - Net@Work

10:45<sup>AM</sup>-12:15<sup>PM</sup>

**R&C: The Project Manager Position**

As ITA members strive to capture and deliver larger and more complex projects for clients, the need for, and contributions of, an experienced Project Manager (PM) become ever more clear and critical. Do you find yourself struggling to define the role of the PM and identifying the attributes and skills of the successful PM? Do you wonder when the PM should be introduced into the prospective opportunity so that effective transitions are made from sales to implementation teams? Are you curious how PM's are being compensated, what on-going training they should receive or what certifications should be maintained? Unless you responded "No" to all of these questions, then you should attend this session where a panel of ITA members will share what is working well and where they experienced challenges in bringing on full time project managers.

**Marilyn L. Lunnemann, CPA, CITP (Moderator)** - Humes & Barrington, LLP

**Tim Beranek** - BKD Technologies

**Steve Birdwell** - IncoTech LLC

**Lissa Johnsen, CMC, CITR.CPA** - Business Technology Solutions, Inc.

**Laurie J. McNicoll** - Schenck Technology Solutions

10:45<sup>AM</sup>-12:15<sup>PM</sup>

**ITC: IT Consulting Practices: The Specifics**

When it comes to IT Consulting (infrastructure) practices, some ITA members have large established practices, others have just entered the business, and some members are thinking about adding this service line to their organizations. We have gathered a panel of ITA members who have developed mature IT consulting practices to discuss why they have gotten into the infrastructure business, what types of services they offer, and how they plan to continue to grow this part of their consulting business. Following short presentations by each of the members, we will facilitate an open discussion between the panel and the attendees to drill down farther into what it really takes to be successful in the IT Consulting and reselling business.

**Stan Mork (Moderator)** - RSM McGladrey, Inc.

**Ken Fishkin** - J. H. Cohn LLP

**David A. Shaffer, MCSE, GSEC** - Tier One Technology Partners, LLC

**Scott Stevens** - Clifton Gunderson LLP

**Pat Vance** - RSM McGladrey, Inc.

10:45<sup>AM</sup>-12:15<sup>PM</sup>

**ITL: ECM Vendor Updates**

This session will feature two of the leading vendors in the Enterprise Content Management (ECM) space and is ideally suited for anyone who is looking to better understand the ECM value proposition. ECM solutions enable firms to go beyond paperless archiving systems and manage all of a firm's content through Document and Email Management, Records Management, Web Portals, and Workflow.

**Mark Jackson** - Interwoven

**Cheryl McKinnon** - Open Text Corporation

12:15<sup>PM</sup>-1:15<sup>PM</sup>

**Luncheon**

1:15<sup>PM</sup>-2:00<sup>PM</sup>

**Open Time for Networking & Vendor Displays**

1:45<sup>PM</sup>-3:00<sup>PM</sup>

**ITL: Microsoft Sharepoint and Office Roadmap Update**

Much has been written and reported regarding the next release of Microsoft Office and Sharepoint. If you're still curious about where the Microsoft Office and Sharepoint product offerings are going, and you want to hear and see it straight from Microsoft, then you will want to attend this vendor presentation session. Also learn about the new SharePoint add-ons being delivered by Colligo.

**Brad Freels** - Microsoft

**Bill England** - Colligo Networks Inc.

2:00<sup>PM</sup>-3:00<sup>PM</sup>

**R&C: Capitalizing on Business Productivity Software in this Changing Business Environment**

As mid-range ERP software opportunities plateau, software services companies need to develop a more diverse skill set and expand their service offerings to their clients. One option to explore is in business productivity software. Adding business productivity software to your list of services will help you meet existing customer needs, while increasing opportunities for additional revenue streams. As organizations move forward with this strategy, they must consider the cost of this investment in light of the potential revenue benefit. They must focus on those software products and services that are currently dominant in the workplace while keeping an eye on emerging solutions that are likely to be adopted. In this session we will cover the standard products such as Microsoft Office, but focus on the solutions offered in its upcoming release. We will also discuss the Information Worker concept and its impact on software solutions like SharePoint, CRM, InfoPath and MS Office. Along with these, we will identify the emerging opportunities of .NET development and SQL Reporting Services, and how to prepare your company to profit from them.

**Derek Cazel** - InterDyn - CFO Consulting

**Steve Lublin, CPA** - InterDyn - CFO Consulting

2:00<sup>PM</sup>-3:00<sup>PM</sup>

**R&C: The ITA Project Management Initiative Update**

Each ITA meeting we reserve time for the Project Management Committee to report on its progress, latest tools developments, and its thinking about how PM can be better structured, understood, and delivered by ITA members, to their staffs, and to their clients. The PM planning template has been refined since the Spring meeting and has been field tested

some by a set of ITA volunteer members. Attend this session to hear from the ITA Project Management Committee Co-Leader Kevin Cumley about how the field testing has progressed, what tweaks and changes have been made, and where the next round of focus will be centered.

**Kevin Cumley** - Forepoint LLC

**Annette Balgord** - Balgord Software Solutions

**Lisa Kianoff** - L. Kianoff & Associates

**Samantha Walker** - RW&A, Inc.

2:00<sup>PM</sup>-3:00<sup>PM</sup>

#### **ITC: The Potential of VoIP: What Impact Will it Have on Your Business?**

We are only beginning to see the potential of VoIP. The technology is maturing, and business-class VoIP offerings are finally nearing the reliability of traditional telephone service. The opportunities for service providers to help deliver on the promise of VoIP are staggering, but not without challenges. In this session we'll be discussing the current market for VoIP services and the need for converged IP networks that can deliver voice, data, fax and video. You'll hear from ITA members who have started to provide services in this area, and learn what challenges they've faced, resources required to get started, and opportunities they have found. Our format will be open discussion and we'll be reviewing the results of the member survey we conducted. Join us for this session and see if VoIP is in your future!

**Scott Stevens** - Clifton Gunderson LLP

**George W. Wilson, Jr., CPA, CITP** - OneSource Professional Services Group

3:15<sup>PM</sup>-4:30<sup>PM</sup>

#### **R&C: WOWs - Highlights of Success**

Back for a return engagement! You won't want to miss this session where a select group of your peers will share winning strategies or activities that made a meaningful difference and improved their business and/or that of their clients.

**Lisa Kianoff, CITP.CPA (Moderator)** - L. Kianoff & Associates, Inc.

#### **ITA Members Describing Their Successes!**

3:15<sup>PM</sup>-4:30<sup>PM</sup>

#### **R&C: SOX Compliance for Small and Mid-sized Businesses and for Subsidiaries**

After several year's of delays and hand wringing discussions, new rules about financial control and compliance are finally coming for your mid-sized clients. Learn how the new Sarbanes Oxley (SOX) and PCAOB regulations will affect privately-held companies (and also the subsidiaries of larger publicly-held companies), and how you might be able to assist your clients in lowering their costs of compliance and reducing their business risks. This session will highlight the business issues, and possible solutions, surrounding SOX in small locations, and how you can gear up to start new services that help solve these issues and challenges.

**Steve Ernst (Moderator)** - SAP America, Inc.

**Ken Lorenz** - SAP America, Inc.

**Jeffrey Zalusky** - Chrysalis, Inc.

3:15<sup>PM</sup>-4:30<sup>PM</sup>

#### **ITC: How to Build and Manage a Profitable IT Managed Services Practice**

Growing a Managed Services practice has strong financial and corollary benefits but is not a short term project. For Solution Providers who want to make money at each stage of Managed Services development, this session delivers insight into the value propositions for the Solution Provider and its

customers at each level. Paul Dipple, a renowned Managed Services consultant and advisor, will provide practical advice and examples that are used to help attendees create an actionable plan to harvest gross margin dollars from implementing the low-cost Managed Services tools available today, right from the start, and help fund the development of the more sophisticated services. A view into the future of Managed Services, particularly in relation to Solution Providers who offer or re-sell ASP/SaaS applications, is included.

**Paul Dippell** - Service Leadership Incorporated

3:15<sup>PM</sup>-4:30<sup>PM</sup>

#### **ITL: ECM – Real World Business Cases**

This panel format session will focus on 3 ITA accounting firm participants' efforts to implement and/or evaluate ECM tools and strategies. Topics to be addressed include: • defining what Enterprise Content Management (ECM) means in a large CPA firm, • what tools and technologies are being evaluated (or are already in use), • what business process and change management considerations need to be addressed when implementing an ECM strategy, and • discussion concerning the major obstacles firms are facing (or can expect to face) when implementing ECM in their Firms. If you are thinking ECM, this session will help you get better focused on the challenges that lay ahead.

**Jeff Clark (Moderator)** - BDO Seidman, LLP

**Debbi Danielson** - Plante & Moran, PLLC

**Craig M. Kaplan** - Wipfli LLP

4:45<sup>PM</sup>-5:40<sup>PM</sup>

#### **Consulting: ITA Business Meeting**

Our member update will report on ITA's priorities, committee activities, and financial issues. As always, we will want, and ask for your thoughts and ideas in what is sure to segue into dinner conversations.

4:45<sup>PM</sup>-5:40<sup>PM</sup>

#### **ITL: ECM Compliance Overview**

In essence, many CPA firms want to better understand the impact of serving clients who have to operate under one or more compliance umbrellas (HIPAA, SARBOX, NASD, etc). This session will help you to better understand how serving these types of clients (ones who must subscribe to one or more compliance programs) impacts your information technology operations and services. Some of the areas that will be addressed include record-retention, security, authentication, security and reporting requirements.

**Julie Davis** - AON

4:45<sup>PM</sup>-5:40<sup>PM</sup>

#### **ITL: Tools and Policies We Use to be Compliant**

This roundtable format session is designed to discuss what tools, technologies and processes each of our firms are using to deal with compliance issues. Specifically this session will focus on areas such as document retention, WORM, and compliance specific issues around such areas as HIPAA, SEC, NASD, SARBOX etc. Our discussions will touch on how compliance policies are established at your firm (does business drive them, legal or IT), if your compliance policies address both paper and electronic records, the technologies and/or processes you have implemented to become compliant, and internal compliance audit requirements.

**Shawn Lewis (Facilitator)** - Clifton Gunderson LLP

6:00<sup>PM</sup>-11:00<sup>PM</sup>

#### **A Real Texas Style Party at Enchanted Springs Ranch!**

We've planned another really fun ITA EVENT, this time with a real Texas Flair! Buses will depart for the ranch at 6:00 PM and the last return is 10:30 PM.

Experience a real working ranch that is also used frequently as a movie/video set. Roam the Texas town sets, take a wagon ride to see their animals, have your picture taken with Woodrow (a longhorn), feed the animals in the Corral, and more! The Almost Patsy Cline Band will entertain us all evening. After dinner: Line dancing and a fast draw contest! Lots of fun, lots of good food, and of course your favorite beverages! Don't forget your western garb! You'll fit right in! Now you know what inspired our logo and theme! As a preview, visit the ranch at [www.enchantedspringsranch.com](http://www.enchantedspringsranch.com)

## Tuesday, November 7, 2006

7:30<sup>AM</sup>-8:15<sup>AM</sup>

### Breakfast & Vendor Displays

8:15<sup>AM</sup>-9:10<sup>AM</sup>

### R&C: Value Pricing's Impact on Commission & Compensation Structures

Value Priced Billing presents new challenges for VAR's in calculating commissions and measuring productivity. There are a number of landmines that have to be navigated and this session will provide an opportunity to hear from several leading VAR's that have completed the transition successfully. Some of the landmines that this session will deal with are: (1) How to measure productivity without billable hours; (2) alternative compensation plans for consultants that don't involve billable hours; and (3) utilizing team-based bonuses. Members of the panel will be respected industry peers that have completed the transition to Value Priced Billing.

**Clark Haley** - BCS...ProSoft

**Rob Cima** - Global Image

**Kevin Cumley** - Forepoint LLC

8:15<sup>AM</sup>-9:10<sup>AM</sup>

### R&C & ITC: Purpose Built Tech Services Practice Management Software

Most ITA members use a collection of disparate software tools to plan, manage, and bill for the delivery of their services. These various tools then have to be "fit" into existing accounting and GL systems, and now more frequently, the CRM systems. The usual result is inefficiency, reporting errors, and probably lost revenues and profits. Today we have the ability to address those shortfalls and lost opportunities with a new generation of "purpose built" (for technology service providers) practice management software. This new generation of software helps schedule people, track service tickets, bill and report on contract and project status, people utilization, client profitability. They tie, often seamlessly, into the popular CRM, GL and managed services software packages.

Representatives from Autotask Corporation of Albany NY are joining us to talk about progress in the development of this new generation of software, and how it can help us run better businesses. This is a "must see" session for both ITC and PF firm leaders.

**Bob Vogel** - Autotask Corporation

8:15<sup>AM</sup>-9:10<sup>AM</sup>

### ITL: IT Security - Where is the Pain?

This roundtable format session will concentrate on the non-technical aspects of IT security inside large CPA firms. Discussion points will include: Staffing and skill set needs, outsource vs. in-source support, CISO and security group reporting structure options, getting firm leadership to buy in, balancing usability and air-tight security, integrating security into project planning, implementation and daily operations, balancing security projects with other needed projects, and managing recurring vulnerability assessments.

**Craig M. Kaplan** - Wipfli LLP

8:15<sup>AM</sup>-9:10<sup>AM</sup>

### ITL: ECM - Document Retention and Destruction at the Desktop

Document management practices on the servers are tough enough to manage and control, but they are not enough. In a truly compliant world, managing documents on your desktop and mobile storage devices is also required. ITA member firm NextPage has developed a new application (NextPage 2 Document Retention) that enables enterprises to manage the risk of documents "on the desktop." The application now securely tracks document versions across e-mail, desktops, USB key drives, and the servers. Organizations can now apply retention or destruction policies to versions on the desktop by purging unwanted copies and posting final versions to any centralized server for archival and lifecycle management. Attend this session to learn more about:

- Enhancing the client engagement close out process by automatically tracking documents that have been saved to any location on a desktop.
- Reducing the costs and liability associated with e-discovery.
- Enabling strategies for compliance with PCAOB Auditing Standard #3.

**James R. Seeley** - NextPage

9:20<sup>AM</sup>-10:15<sup>AM</sup>

### R&C: Business Intelligence (BI) - The "Keep it Simpler" Solution

Business Intelligence (BI), or Business Analytics (BA), or Dashboarding, or however you label it, has become increasingly popular with mid-sized business owners and operators. As predicted two years ago by Bob Anderson at Gartner, this new business opportunity, like CRM, is finally taking on real traction. While software (and underlying technology infrastructure) costs have come down, getting key business indicator data trapped and reported properly is still a big challenge that is often complicated by organizational resistance. In face of that challenge, and in a lot of cases, the old adage "simpler is better" may be the best answer. Join our speaker to explore the results of his efforts over the last 10 years to build a profitable and sustainable BI practice that is focused on the SMB market sized client. Knowing what he has learned the hard way could save you significant time, energy, and money.

**George McMann** - BizNet Software

9:20<sup>AM</sup>-11:00<sup>AM</sup>

### R&C: Succession Planning: Preparing Your Firm to Run Without You

Have you been thinking you need to develop a succession plan or have you started the process but can't quite complete it? Attend this session to understand where your ITA peers are at in developing their succession plans, what successes they've had, and hear a real-life example of how to get it done. You'll leave this session understanding:

- Who you'll have to "be" to lead a succession planning effort;
- How to begin developing leaders in your practice;
- Methods to market and message your succession plan;
- Managing client expectations throughout your transition; and
- Navigating the financial and contractual issues.

**Tamera Loerzel** - ConvergenceCoaching, LLC

**Marilyn L. Lunnemann, CPA, CITP** - Humes & Barrington, LLP

9:20<sup>AM</sup>-10:15<sup>AM</sup>

### ITC: Remote Security

At the core of almost all Infrastructure and IT consulting practices are relationships with software providers that manage "the connectivity point" of your systems to the networks and internets that you and your clients do business with. These tools

manage the firewall, the access controls process, spam, virus checking, and much more. Layered on top of that base line are new products and services that facilitate the remote monitoring and maintenance of the network and its critical components. Together, these tool kit combinations are enabling service providers (like you) to build and deliver larger, more valuable, relationships with your clients. We have invited industry leaders Fortinet Inc. of Sunnyvale CA, and Zenith Infotech LTD of New York City, to update us on their latest offerings and their plans for the coming year. In these two sessions you can learn how to put the basics of a world class IT consulting practice in place for your clients.

**Freddy Mangum** - Fortinet

9:20<sup>AM</sup>-11:00<sup>AM</sup>

### **ITL: Project Planning, Management and Control**

This panel format session will focus on 3 ITA accounting firm participants and their different approaches to addressing the practical aspects of information technology project planning, management, and quality control. Topics to be addressed include:

- what needs to be considered when evaluating different approaches to planning, managing, and controlling information technology projects,
- what project management tools, mechanisms, and methodologies do participants firms use or plan to use,
- what is the value and proper positioning of a "Project Management Office" organizational approach? Is a fully dedicated Project Manager role practical for regional and middle-tier accounting firms vs. consolidating necessary PM responsibilities with other roles? If you are unsure about how better Project Management might help your firm, come listen and learn about the experiences others are having.

**Jeff Clark (Facilitator)** - BDO Seidman, LLP

**Kevin Fraase** - Eide Bailly LLP

**Padmaja Vrudhula** - Moss Adams

9:20<sup>AM</sup>-11:00<sup>AM</sup>

### **ITL: IT Security**

This roundtable format session is designed to discuss the latest trends in security for desktops/laptops and PDA's. With regulatory requirements increasing, companies are expected to take a more proactive approach securing their data on these devices. Our discussions will touch on: What security measures are currently in place in our member Firms? What are the industry trends and options available to adequately secure these devices? Who are the leading vendors providing these kinds of solutions? What are the right short-term and long-term goals in providing secure computing? What steps has your firm taken (or will be taking) to meet these challenges?

**Russ Ahlers (Facilitator)** - BDO Seidman, LLP

10:20<sup>AM</sup>-11:15<sup>AM</sup>

### **R&C: Business Intelligence (BI) – The Full Suite Solution**

If you haven't looked at the current function and feature sets of some of the leading BI application software packages, we're gonna make it easy for you to do so. We have invited representatives from industry leader Business Objects to make a 45 minute presentation on their products, their "go to market strategies", the profiles of typical mid market engagements, their competitive advantages, their economics and value propositions, and their channel programs. If providing BI offerings to clients, or expanding your current BI offerings, is in your future, this session will give you the information you need about what to expect from the leading application software providers.

**Vivian Chan** - Business Objects

10:20<sup>AM</sup>-11:15<sup>AM</sup>

### **ITC: MS-Based VoIP Systems**

If you currently work with clients to deliver most VoIP systems available today, you'll quickly appreciate that most of those solutions require you to have (or partner with) people with "voice centric" technology backgrounds. "What if" all you needed were people with "data centric" technology backgrounds? More specifically, "what if" all they had to know was the Microsoft world? Can you imagine how much easier voice solutions would fit into what you already do? Representatives from Vonexus, a subsidiary of Interactive Intelligence in Indianapolis IN are joining us to show us such an alternative. Not only will they present the server side consistency, but they will also show the power of an all Microsoft solution that integrates seamlessly into MC CRM and Dynamics GP and NAV. That's powerful stuff. Attend this session to see why ITA members Dave Shaffer and Scott Stevens are so excited about this company.

**Bill Maret** - Vonexus

11:20<sup>AM</sup>-12:35<sup>PM</sup>

### **R&C: The BI Practice - A Real World Look at What It Might Require**

While building a BI practice might make sense from the strategic and vendor perspectives, what kind of time, people, and money investment will it really take to get started and get to at least breakeven operations. We have invited ITA members to tell us about their real-life experiences and what it really takes to build a BI practice. You'll learn when and how they started, how they went to market, how they picked their vendor partners, what kind of talent they needed and where they found it, what the training ramps and sales curves looked like, etc. This session will provide real, practical, and tangible insight into this exciting new service growth area.

**Rob Cima** - Global Image

**David Presti** - Paris Technologies

**John D. Woodburn** - The Woodburn Group

11:20<sup>AM</sup>-12:35<sup>PM</sup>

### **R&C: Budgeting & Forecasting**

This session will provide you with tools to create annual budgets and forecasts based on actual performance. Building off the discussion during the Spring meeting, we will look at Adaptive Planning's tools and ITA members will share their tools and experience in budgeting and forecasting. We'll also preview the new tool to be used for the Spring 2007 Financial Benchmarking.

**Steve Krueger** - Business Technology Systems, Inc.

**Robert Gaby, CPA, CITP** - Information Technology Group, Inc.

**Rob Hull** - Adaptive Planning

11:20<sup>AM</sup>-12:35<sup>PM</sup>

### **R&C: Remote Managed Services**

At the core of almost all Infrastructure and IT consulting practices are relationships with software providers that manage "the connectivity point" of your systems to the networks and internets that you and your clients do business with. These tools manage the firewall, the access controls process, spam, virus checking, and much more. Layered on top of that base line are new products and services that facilitate the remote monitoring and maintenance of the network and its critical components. Together, these tool kit combinations are enabling service providers (like you) to build and deliver larger, more valuable, relationships with your clients. We have invited industry leaders Fortinet Inc. of Sunnyvale CA, and Zenith Infotech LTD of New York City, to update us on their latest offerings and their plans for the

coming year. In these two sessions you can learn how to put the basics of a world class IT consulting practice in place for your clients.

**Clinton Gatewood** - Zenith Information Technology

11:20<sup>AM</sup>-12:35<sup>PM</sup>

**ITL: Metrics and Benchmarking Round 2 (ITA - ITL Members Only)**

This session is an ITA-ITL Members Only session which will focus on a review of our updated metrics and benchmarking results. We had a great discussion at our last meeting and left with a few To-Dos. Kevin Simmerman and Steve Noble have been busy crunching the numbers and we will see and discuss the revised results in this session. Additionally, we will begin to discuss Service Level Agreements (SLA) metrics. Plante & Moran will present their firm's technology SLAs. Using this information we can determine if we would like to expand our on-going metrics and benchmarking process to include SLA metrics in the future.

**Kevin P. Simmerman** - bmc

**Steven A. Noble, CPA, CITP** - LarsonAllen

**Dave Townsend** - Plante & Moran, PLLC

11:20<sup>AM</sup>-12:35<sup>PM</sup>

**ITL: Storage Requirements**

This roundtable format session is designed to address topics related to managing the demands and requirements associated with the ever-increasing growth of data storage. Our discussions will address questions such as: Are email mailbox quotas being used? Do you use file-server disk space quotas? Are you utilizing file compression technologies? What are the cost benefits of using different hard-drive technologies (SATA, SCSI, SAS)? What SAN technology are you deploying? How do your data storage requirements affect your recovery strategy? Do you move your data to a secondary storage platform and if so at what point?

**Bill Stone** - Eide Bailly LLP

12:35<sup>PM</sup>-1:45<sup>PM</sup>

**Luncheon & Vendor Displays**

1:45<sup>PM</sup>-2:45<sup>PM</sup>

**Consulting: Knowledge Increases in Value When it is Shared**

Back by popular demand, we've scheduled roundtable discussions and increased the time slots devoted to them! Use these roundtable events to find out from your peers what they are doing or doing differently in the areas of interest to you. You will have the opportunity to select two topics and meet with your peers for 60 minutes on each of these moderated discussions. Come prepared to share and learn ideas that you can take back to your office for immediate impact!

- ▶ Successful Recruiting
- ▶ Ideas for Successfully Managing Salespeople
- ▶ Ideas for a Successful Customer Conference
- ▶ Marketing – Successful Lead Generation Strategies
- ▶ Marketing – Defining your Competitive Differentiators
- ▶ Strategic Planning for Your Firm's Mergers and Acquisitions
- ▶ Compensation Plans
- ▶ Client Nurturing and Satisfaction
- ▶ IT Consulting: Managed Services Monitoring Tools & Key Metrics at Start-Up

1:45<sup>PM</sup>-2:45<sup>PM</sup>

**ITL: Managing IT Value Perceptions**

The word "value" is often used, but what does it mean when it comes to IT services? Dictionary definitions for the word value include "desirable," "worthwhile," and "fair return or equivalent in goods." Like anything else, information technology services are only considered "valuable" when they are perceived to deliver a fair return for the funds spent on them. This session will walk you through the challenges and solutions related to how three different ITA CIOs measure, communicate and demonstrate IT value to their organization's stakeholders.

**Brian Prascius** - Plante & Moran, PLLC

**David Hirschhorn** - Eide Bailly LLP

**David L. Holyoak, CPA** - Grant Thornton LLP

1:45<sup>PM</sup>-2:45<sup>PM</sup>

**ITL: Telecom Landscapes (MPLS-VPN-Metro Ethernet)**

This facilitated discussion session will concentrate on the options being used by participating firms to solve the telecom challenges that exist in large CPA firms today. Topics will be technical in nature and will include: The challenges of assimilating multiple vendors and multiple technologies, what traffic types are being supported (video, data, voice) and how, different configuration approaches such as QOS, prioritization and capacities, implementation and operational pit-falls, scalability and traffic routing options, and alternative uses such as primary access, backup, and disaster recovery,

**Doug Erickson (Facilitator)** - Wipfli LLP

2:45<sup>PM</sup>-3:45<sup>PM</sup>

**Consulting: Knowledge Increases in Value When it is Shared**

Back by popular demand, we've scheduled roundtable discussions and increased the time slots devoted to them! Use these roundtable events to find out from your peers what they are doing or doing differently in the areas of interest to you. You will have the opportunity to select two topics and meet with your peers for 60 minutes on each of these moderated discussions. Come prepared to share and learn ideas that you can take back to your office for immediate impact!

- ▶ Successful Recruiting
- ▶ Ideas for Successfully Managing Salespeople
- ▶ Ideas for a Successful Customer Conference
- ▶ Marketing – Successful Lead Generation Strategies
- ▶ Marketing – Defining your Competitive Differentiators
- ▶ Strategic Planning for Your Firm's Mergers and Acquisitions
- ▶ Compensation Plans
- ▶ Client Nurturing and Satisfaction
- ▶ IT Consulting: Managed Services Monitoring Tools & Key Metrics at Start-Up

2:45<sup>PM</sup>-3:45<sup>PM</sup>

**ITL: ITL Next Meeting Planning**

This session will critique the Fall Collaborative and set the agenda, topics and potential speakers/resources for the Spring Meeting ITL Track and perhaps future ITL meeting content. As always, we are looking for your thoughts and ideas!

**Douglas M. Brady** - Plante & Moran, PLLC

**David L. Holyoak, CPA** - Grant Thornton LLP

3:45<sup>PM</sup>-4:30<sup>PM</sup>

**General Session: Collaborative Wrap-Up**