

ITA Fall Collaborative

November 7-9, 2004 - Eden Roc Resort, Miami Beach

Sunday, November 7, 2004			
4:00 PM Registration			
5:30 PM • Room 3 Opening Session - The IT/SMB Marketspace			
7:00 PM • Room 4 Vendor Party & Displays			
Monday, November 8, 2004			
Social/Meals	Consulting Track	Consulting Track	Internal Tech Leaders Track
7:00 AM - 7:50 AM • Room 4 Breakfast and Displays	7:20 AM - 7:50 AM Vendor/Partner Sessions Immediattech • Palm CPA Online • Star CCH • San Marino		OPEN
	8:00 AM - 9:15 AM • Room 4 Current & Legal Issues Facing Today's Employers		8:00 AM - 9:00 AM • Room 3 Protecting Your Assets
	9:30 AM - 10:20 AM • Room 1 Errors and Omissions Insurance - How Big is the Risk	9:30 AM - 10:20 AM • Room 2 Existing Clients = Continuing Revenue	9:00 AM - 10:00 AM • Room 3 Absolute Software Presentation
	10:35 AM - 11:25 AM • Room 1 Independent Contractor and Employee: Understanding the Difference	10:35 AM - 11:25 AM • Room 2 ROI - The Strategic Dialogue	10:20 AM - 11:10 AM • Room 3 Canning the Spam: Recipes For Controlling Unwanted E-mail
	11:30 AM - 12:00 PM Vendor/Partner Sessions Open Systems • Room 2 Blackbaud • Palm Periscope • Star AICPA • San Marino		11:10 AM - 12:00 PM • Room 3 Postini Presentation
12:00 PM - 1:00 PM • Room 4 LUNCHEON - ITA Marketing & Branding Committee Report			12:00 PM - 1:00 PM • Room 3 LUNCHEON - Do You WiFi - The Future of Wireless Networking - Cisco
	1:00 PM - 1:30 PM Vendor/Partner Sessions Best • Room 1 Epicor • Room 2 Intermedec • Palm Adaptive Planning • Star ATX • San Marino		OPEN
	1:40 PM - 2:55 PM • Room 1 You Have a Strategic Plan - Now What?	1:40 PM - 2:55 PM • Room 2 Developing the Next Generation of Leaders	1:40 PM - 2:55 PM • Room 3 WiFi - Wireless Networking - Cisco and Plant & Moran
	3:10 PM - 4:25 PM • Room 1 Sarbanes-Oxley (SOX) - What Is It and Where Do You Fit In?	3:10 PM - 4:25 PM • Room 2 Hiring Excellent, Successful Sales People	3:10 PM - 4:25 PM • Room 3 Peer to Peer Wireless Networking - Colligo and Crowe Chizek
	4:40 PM - 5:55 PM • Room 1 How Project Management Saves the Flat Fee Engagement	4:40 PM - 5:55 PM • Room 2 Strategies for Staffing Your Consulting Practice	4:40 PM - 5:55 PM • Room 3 Wireless Security - Hewlett Packard ProCurve
6:15 PM - 11:00 PM Party Time! 6:15 PM • Exhibition Center & Terrace - Reception and Wall Climbing 7:30 PM • Room 4 - Salsa Party			
Tuesday, November 9, 2004			
7:00 AM - 7:50 AM • Room 4 Breakfast and Displays	7:20 AM - 7:50 AM Vendor/Partner Sessions Colligo • Star Absolute Software • San Marino		7:20 AM - 7:50 AM • Room 3 Breakfast Briefing by Microsoft
	8:00 AM - 9:00 AM • Room 4 SMB Channel Dynamics - A Fresh Look at What's Working and What's Not		8:00 AM - 11:40 AM • Room 3 Workpaper Management - Do You Know Where Your Workpapers Are?
	9:15 AM - 10:05 AM • Room 1 5 Levers to Control & Grow Your Business - Part 1	9:15 AM - 10:05 AM • Room 2 Linux and the SMB Market	8:00 - 9:00 AM Eisner 9:00 - 9:40 AM Immediattech 10:00 - 10:40 AM CCH 10:40 - 11:20 AM Interwoven
	10:20 AM - 11:10 AM • Room 1 5 Levers to Control & Grow Your Business - Part 2	10:20 AM - 11:10 AM • Room 2 Creating Strategic Alliances	
	11:25 AM - 12:40 PM • Room 1 Lessons Learned from Selling Competitive Products from Two or More Publishers	11:25 AM - 12:40 PM • Room 2 RFID...The ABC's	11:40 AM - 12:40 PM • Room 3 Backup to the Future - Strategies for Backing Up Data
12:40 PM - 2:00 PM • Room 3 LUNCHEON - AICPA Emerging Technologies Watch List			
	2:15 PM - 3:15 PM • Room 3 YOU Don't Need No Stinkin' Timesheets!!		2:15 PM - 3:45 PM • Room 1 Backup Vendor Presentations
	3:15 PM - 3:45 PM • Room 3 Financial Benchmarking - Our Pursuit of the Golden Fleece		2:15 - 3:15 PM CommVault 3:15 - 3:45 PM Connected
	3:45 PM - 4:30 PM • Room 3 ITA Business Meeting & Collaborative WrapUp		3:45 PM - 4:00 PM • Room 1 Internal Tech Leaders Track WrapUp

AGENDA

2004 ITA Fall Collaborative "Best Practices in the Spotlight"

November 7-9, 2004 - Eden Roc Resort, Miami Beach

SUNDAY, NOVEMBER 7

4:00^{PM} - 10:00^{PM} **Registration**

5:30^{PM} - 7:00^{PM} **General Session**

6:00^{PM} - 7:00^{PM} **The IT/SMB Marketspace**

For the third straight year, we open the Fall Collaborative with a comprehensive industry overview of the business and technology dynamics impacting the small and mid-sized business market place today. Bob Anderson, SMB Solutions Research Director with the Gartner Group, will once again provide his candid and insightful analysis of what is happening with the clients, vendors, vendor channel programs, and the various technologies and applications that are hot now, and those that will be coming at us over the next 18 months.

Robert Anderson - Gartner Group

7:00^{PM} - 10:00^{PM} **Vendor Party & Displays**

MONDAY, NOVEMBER 8

7:00^{AM} - 7:50^{AM} **Continental Breakfast & Displays**

7:20^{AM} - 7:50^{AM} Concurrent Vendor/Partner Presentations - (See Separate Sheet)

8:00^{AM} - 9:15^{AM} Concurrent Sessions

Keynote for Consultants
Current & Legal Issues Facing Today's Employers

Two important topics will be discussed by a highly recognized attorney on issues connected to employment and labor laws. Terminating Employees Without Lawsuits outlines the potential legal risks facing employers when terminating employees, and offers advice in how to mitigate or avoid those risks. Key issues (1) Legal obligations of employers under federal and state law and (2) Steps employers should take in preparation for terminations. Legal Strategies to Protect Against the Loss of Key Personnel and Customer Information to Competitors addresses the importance of correctly drafting and enforcing non-compete and confidentiality agreements, along with methods for turning a business's information into protectable trade secrets. Key issues (1) Advantages employers gain in imposing non-compete and confidentiality agreements and (2) Practical suggestions employers can use in protecting their trade secrets.

Joel J. Greenwald, Esq. - Joel Greenwald and Associates, P.C.

8:00^{AM} - 9:00^{AM}

For Internal Tech Leaders
Protecting Your Assets

Today, laptops and desktops are an essential asset in any organization today and represent a significant cost. This session will focus on PC management strategies including purchase vs. leasing; effective laptop and desktop tracking and the recovery of stolen laptops and desktops.

David L. Holyoak, CPA - Grant Thornton LLP

9:30^{AM} - 10:20^{AM}

Concurrent Sessions

For Consultants
Errors and Omissions Insurance - How Big is the Risk

E&O Insurance, often referred to as Professional Liability Insurance, is a complicated matter for most of us. We don't really understand it or why we need it, we hear it's horribly expensive, and we don't know much about our options, so we just tend to ignore it. Yet you wouldn't put your business at risk by not having automobile insurance. In this session, two insurance professionals will tell us about E&O and lead us through a couple of case studies to better understand what can happen when a project goes bad, and what you do (or don't do) that makes you vulnerable. We'll have an actual underwriter explain to us how he looks at the various risks within an IT consulting practice, and what he wants to see in our business processes to be able to feel that we have those risks properly managed and are insurable. The answers may surprise you.

David Koenen - Lemme Insurance Group, Inc.

David Selembo - The Hartford Group

9:30^{AM} - 10:20^{AM}

For Consultants
Existing Clients = Continuing Revenue

"Gain New Clients, But Keep The Old. One Is Silver and The Other Gold." It is an old adage, but this last year has proven that existing clients can see us though an economic downturn when new sales are few and far between. Attend this session to hear several resellers share techniques they have used, such as End-User Conferences, to instill loyalty among their client base and keep them coming back for years!

Sue Bennett, Moderator - Bennett / Porter & Associates, Inc.

Manny Buigas, CPA - NextLevel Information Solutions

Clark Haley - Business Computer Systems

Lissa Eilers Johnsen, CPA, CMC - Business Technology Solutions, Inc.

- 9:00^{AM} - 10:00^{AM} For Internal Tech Leaders
Asset Management Vendor Presentation
- During this session an asset management vendor will demonstrate their technology for keeping track of your laptops and desktops including time for questions and answers.
- Bob Chow - President and COO, Absolute Software
- 10:20^{AM} - 11:10^{AM} Concurrent Sessions
- For Internal Tech Leaders
Canning the Spam: Recipes For Controlling Unwanted E-mail
- On a daily basis, there are over 20 million spam e-mails traveling over the internet. At best, these e-mails bring unappealing messages and, at worst, the latest and greatest computer virus. That's why Spam Technologies debuted on the Top Technologies 2004 list at number two, right behind Information Security. This session brings you and your organization critical information on leading edge tools, techniques and services that can be used to bring spam under control and make e-mail safer. Topics will include: (1) Different techniques and tools for filtering spam, along with the pros and cons of each method; (2) How to protect you and your organization from being used as an unwitting distributor of spam; (3) How to avoid common scams spread by spammers; and (4) Practical tips you can employ immediately and resources you can use to battle spam.
- David M. Cieslak, CPA, CITP, GSEC - Information Technology Group, Inc.
- 10:35^{AM} - 11:25^{AM} For Consultants
Independent Contractor and Employee: Understanding the Difference
- Our morning's keynote speaker continues by offering this breakout session. He will explain the legal distinctions between an employee and an independent contractor. There are several perceived financial benefits for an employer to designate someone in his workforce as an independent contractor, such as insulation from overtime and anti-discrimination liability. Misclassifying employees as independent contractors, however, may have devastating financial effects. Key issues to be covered include: (1) Factors used to distinguish between employees and independent contractors; (2) What are the advantages of having independent contractors; and (3) The expensive pitfalls of misclassification.
- Joel J. Greenwald, Esq. - Joel Greenwald and Associates, P.C.
- 10:35^{AM} - 11:25^{AM} For Consultants
ROI - The Strategic Dialogue
- Understanding and estimating Return on Investment (ROI) is an integral part of the strategic decision making process for IT firms contemplating a merger or acquisition. This session will review various methodologies that can be used to calculate and evaluate ROI. Beyond calculating ROI, the speakers will discuss how to use ROI to effectively evaluate significant strategic decisions and financial investments for your firm and your clients.
- Mark Meller - Trey Resources, Inc.
 Jeff Roth - SWK Technologies, Inc.
- 11:10^{AM} - 12:00^{PM} **Spam Vendor Presentation**
- During this session, Postini will demonstrate their technology for controlling spam including time for questions and answers.
- Donna McIntire - Postini Corporation
- 11:30^{AM} - 12:00^{PM} Concurrent Vendor/Partner Presentations - (See Separate Sheet)
- 12:00^{PM} - 1:00^{PM} For Consultants
 Luncheon & ITA Business
Marketing Committee Report by Co-Chairs
- Douglas S. Deane - DSD Business Systems
 Peyton Burch - Burch Consultants
- 12:00^{PM} - 1:00^{PM} For Internal Tech Leaders
 Luncheon & Topic
Do You WiFi? - The Future of Wireless Computing
- This session will focus on the future wireless computing including WiMax, 30 mile wireless networking. With market value expected to reach \$5 billion by 2007 and the endorsement of some of the biggest names in telecommunications, WiMAX is poised to change the broadband wireless landscape as we know it. But how much of WiMAX's touted potential is merely hype? Attend this session and find out.
- Vince Pandolfi - Design Consultant, World Wide Program Delivery Group, Cisco Systems
- 1:00^{PM} - 1:30^{PM} Concurrent Partner/Vendor Presentations - (See Separate Sheet)
- 1:40^{PM} - 2:55^{PM} Concurrent Sessions
- For Consultants
You Have a Strategic Plan - Now What?
- At the Spring ITA Members Meeting, we shared several approaches and tools to help you develop a strategic plan for your business. You may have gone home and created one, or you already have one in place. In this session, we'll explore methods for "living" your strategic plan, prioritizing your many growth drivers and opportunities and we'll identify: (1) Tips for putting your strategic plan to work for you; (2) Simple methods for reviewing your progress and refining your goals; and (3) Accountability structures to involve your entire team in realizing success!
- Lissa Eilers Johnsen, CPA, CMC - Business Technology Solutions, Inc.
- 1:40^{PM} - 2:55^{PM} For Consultants
Developing the Next Generation of Leaders
- Shifting industry landscape, fluctuating markets and changing work ethics require organizations of all sizes to have world-class leaders in order to effectively adapt. Leadership transition within your organization is crucial to ensuring the sustainability and growth of your company. This session will provide the following insights and techniques: (1) Competencies and skills needed for leading high performance teams in this rapidly changing business environment; (2) Striking a balance of management infrastructure with flexibility and innovation; (3) Identifying internal candidates with leadership potential, and (4) Processes for developing, mentoring and measuring leaders in your firm. Whether it is one or ten leaders needed for your firm, this session is designed to help you bring your organization to the next level.
- Bonnie M. Robertson - The Robertson Company

1:40^{PM} - 2:55^{PM} **For Internal Tech Leaders**
WiFi - Wireless Networking

Wireless networking computing offers many benefits such as convenience and reduced infrastructure wiring costs. This session will focus on wireless networking including WLAN basics, calculating ROI, deployment considerations, the required infrastructure, benefits, risks, and lessons learned.

Vince Pandolfi - Design Consultant, World Wide Program Delivery Group, Cisco Systems

Doug Brady - Plante & Moran, LLP

3:10^{PM} - 4:25^{PM} **Concurrent Sessions**

For Consultants
Sarbanes-Oxley (SOX) - What Is It and Where Do You Fit In?

The Sarbanes-Oxley Act is now a reality and offers new opportunities to the technology and business consulting industry. This session will provide an overview of SOX, discuss engagement specifics, and review common pitfalls to avoid. Information and tools reviewed at this session will provide you with useful information and insight to determine if this is an initiative that your company should pursue.

Lynn K. Berman - SWK Technologies, Inc.

3:10^{PM} - 4:25^{PM} **For Consultants**
Hiring Excellent, Successful Sales People

Have you tried to transition your sales functions to dedicated sales people only to find your sales numbers drop? In this session we'll explore what it takes for a new sales person to be consistently effective by looking at: (1) The type of person to hire, such as a professional sales person with a sales background versus a technologist who is versed on the solution; (2) Resources and places to recruit sales people; and (3) Critical information, questions to ask and background you should identify during the sales person hiring process. We'll share real-life examples shared by firms who are making it work and are realizing the benefits of a dedicated sales organization!

Tamera Loerzel, Moderator - ConvergenceCoaching, LLC

Jo Barsa, CPA - Barsa Technology Solutions, Inc.

Greg Boyd, CPA, MBA - ERG - Enterprise Resource Group

Jeannie Huckstep, CPA - Huckstep & Associates, LLC

Chuck Wunderlich - BDO Seidman, LLP

3:10^{PM} - 4:25^{PM} **For Internal Tech Leaders**
Peer to Peer Wireless Networking

With the migration to paperless workpapers, the ability for today's professionals to work as a team and to share information has become critical. Attend this session to learn how to more effectively work in a secure, wireless environment while at a client location.

Barry Jinks - President & CEO, Colligo Networks, Inc.

Carl Kroboth - Crowe, Chizek and Company LLP

4:40^{PM} - 5:55^{PM} **Concurrent Sessions**

For Consultants
How Project Management Saves the Flat Fee Engagement

Project Management is essential for any flat fee engagement to be profitable. During this session we will review how to manage a project from the sales cycle through the implementation to ensure that the engagement is budgeted correctly. We will also review common mistakes that are made during the sales cycle and implementation for flat fee engagements. Several project management work papers will be provided as part of this session.

Stuart L. Blumenthal - Blumenthal Technology Consulting

4:40^{PM} - 5:55^{PM} **For Consultants**
Strategies for Staffing Your Consulting Practice

Are you curious if you have the right mix of professional and support staff? Ever wonder how other ITA firms staff their consulting practices? Utilizing a survey sent to our ITA practice firms, this session will provide an insightful look at how top consulting firms of varying sizes staff their practices, and the relationships between human resource allocation, management trends, billable time and product margins.

Bridgette Hobart Janeczko - Paradigm Technology Consulting, LLC

Laurie J. McNicoll - Schenck Technology Solutions

4:40^{PM} - 5:55^{PM} **For Internal Tech Leaders**
Wireless Security

Wireless computing is not a matter of if but when. Attend this session to learn about the risks of wireless computing and the best practices being used today to mitigate the identified risks.

Dodson Dietrich - Solution Architect Hewlett-Packard Pro Curve Networking Business

6:15^{PM} - 11:00^{PM} **It's Time to Party!**

In typical ITA fashion, we've planned an event that's packed with fun things to do, good food & drink and plenty of time to network with others! We'll start out with cocktails poolside. If you are into wall climbing or want to try...boy do we have a wall for you to climb! At 7:30 we'll go inside for dinner, dancing & salsa instruction!

TUESDAY, NOVEMBER 9

7:00^{AM} - 7:50^{AM} **Continental Breakfast**

7:20^{AM} - 7:50^{AM} **Concurrent Vendor/Partner Presentations - (See Separate Sheet)**

Breakfast Briefing by Microsoft
Information Life Cycle Management

"Data is growing at 125 percent a year, yet up to 80 percent of this data remains inactive in production systems where it cripples performance," says Charlie Garry, senior program director at Meta Group. "To compound this problem, many enterprises are in the midst of compliance initiatives that require the retention of more data for longer periods of time, as well as consolidation projects that results in significant data growth." Attend this session to find out more about Microsoft's broad vision for information lifecycle management.

Rene Alamo - Microsoft

- 8:00^{AM} - 9:00^{AM} Concurrent Sessions
- Keynote for Consultants
SMB Channel Dynamics - A Fresh Look at What's Working and What's Not
- The SMB space is crowded and getting more so every day. Everyone wants a piece of this fastest growing part of the IT landscape. But to really get it, and get it right, how does the channel matter? ITA welcomes Nancy Bedard, Vice President Business Communication Strategies, The Yankee Group to our meeting. The Yankee Group has just completed a major analysis of the importance of the channel and channel programs to a vendor's success in the SMB market. Nancy will share Yankee Group's findings and conclusions with us. She will also share the Yankee Group's views on what application solutions and key technologies SMB customers will be looking for today and over the next couple of years. She'll give you great insights and a pretty good crystal ball into the SMB market.
- Nancy Bedard - The Yankee Group
- 8:00^{AM} - 9:00^{AM} For Internal Tech Leaders
Workpaper & Document Management - Do You Know Where Your Workpapers Are?
- Today, the majority of workpapers are electronic introducing a new paradigm for workpaper management and retention. Attend this session to understand and discuss today's challenges with workpaper management and document retention. See how a CPA Firm has addressed these challenges.
- Gary Rosenberg - CIO, Eisner, LLP
- 9:00^{AM} - 9:40^{AM} For Internal Tech Leaders
Workpaper & Document Management Vendor Presentations
- Leading workpaper management vendors will demonstrate their ability to effectively manage client workpapers. Attend this session to learn more about their offering.
- Joe Harpaz - Immediatech Corporation
- 9:15^{AM} - 10:05^{AM} Concurrent Sessions
- For Consultants
5 Levers to Control & Grow Your Business - Part One: How 5 times 10% Growth = 61% Increase In Profits - Part One
- You'll walk away from this session with an understanding of the 5 levers, why each is important, and how you can manage each lever. Once you can manage these levers, you can use them to grow your bottom line! The first lever we will discuss is number of leads. Do you track this metric? Did you know that 80% of all advertising doesn't work? Do you know the real purpose of marketing? How would your bottom line be impacted if you could increase your number of leads by just 10%? Come to this session to learn the other four levers! There's so much information we'll take two hours to cover it all! For each lever, Joe will share facts, tips, and best practices and then guide participants through a brainstorming session to share their experiences. Everyone is sure to leave with ideas they can implement to help them grow their business. The workshop finishes by showing the numbers – how 10% growth in each of the 5 levers yields a 61% increase in profits.
- Joseph P. Rotella - Delphia Consulting, LLC
- 9:15^{AM} - 10:05^{AM} For Consultants
Linux and the SMB Market
- A rapidly growing number of small and medium sized businesses are relying on the reliability, cost, performance, and ease of integration benefits of Linux. This session will provide a description of the Linux operating system, recent news about Linux, and the benefits associated with its use. A summary of the six primary Linux plays (server workload consolidation, clustering, distributed enterprise, infrastructure solutions, application solutions and desktop) will be provided along with some customer successes in each area. IBM's commitment to Linux, market strategy and partnering programs will also be described.
- Ralph Cooley - Linux Sales Specialist, IBM Linux Impact Team (Tampa)
- Rita Strauss - Open Systems, Inc.
- 10:00^{AM} - 10:40^{AM} For Internal Tech Leaders
Workpaper & Document Management Vendor Presentations
- Leading workpaper management vendors will demonstrate their ability to effectively manage client workpapers. Attend this session to learn more about their offering.
- Sue Torgerson - Marketing Manager, CCH
- 10:20^{AM} - 11:10^{AM} Concurrent Sessions
- For Consultants
5 Levers to Control & Grow Your Business - Part Two: How 5 times 10% Growth = 61% Increase In Profits - Part Two
- Joseph P. Rotella - Delphia Consulting, LLC
- 10:20^{AM} - 11:10^{AM} For Consultants
Creating Strategic Alliances
- This session will highlight the state of the industry and the changing models of CPA firms and the value proposition for Trusted Advisors. You will better understand statistics on what is happening within firms and why alliances are important. Partners, who have created extremely successful alliance programs that entice Trusted Advisors to participate with them, will talk about their programs and what has made them successful.
- Lisa Kianoff, CITP.CPA - L. Kianoff & Associates, Inc.
- Chuck Wunderlich - BDO Seidman, LLP
- 10:40^{AM} - 11:20^{AM} For Internal Tech Leaders
Workpaper & Document Management Vendor Presentations
- Leading workpaper management vendors will demonstrate their ability to effectively manage client workpapers. Attend this session to learn more about their offering.
- Sharon Pinedo - Account Manager, Interwoven
- 11:20^{AM} - 11:40^{AM} For Internal Tech Leaders
Workpaper & Document Management Question & Answer Session

11:25^{AM} - 12:40^{PM} Concurrent Sessions

For Consultants
Lessons Learned from Selling Competitive Products from Two or More Publishers

Thinking about selling a product that competes with a product you already carry? Think you can imagine the pitfalls of dealing with competing manufacturers? Attend this session to hear from panelists who are selling competitive products to hear how they're dealing with things such as conflicting lead generation, co-op reimbursement, and false competitor claims.

Sue Bennett, Moderator - Bennett / Porter & Associates, Inc.

Tom Doran - Productivity Management Inc.

Robert Gaby, CPA, MCP - Information Technology Group, Inc.

Alex Solomon - Net@Work

11:25^{AM} - 12:40^{PM} For Consultants
RFID...The ABC's

What is RFID? What do you do with RFID? Who benefits from RFID? Who supplies and implements RFID? What are the benefits of RFID to your client's business?

These basic questions will be answered by three qualified authorities on RFID...A User, A Supplier and An Implementer.

Tomas Berend - Director of Technical Services, Radio Beacon

L. Allen Bennett - President & CEO, SystemConcepts, Inc.

11:40^{AM} - 12:40^{PM} For Internal Tech Leaders
Backup to the Future - Strategies For Backing Up Data

Next to your people, your organizational data may be the next most important assets. This session will focus on various backup strategies for laptops, desktops and servers, including the pros and cons of each strategy.

Dave Johnson - Grant Thornton LLP

12:40^{AM} - 2:00^{PM} **Luncheon & AICPA Emerging Technologies Watch List**

Each year the AICPA develops and publishes its Emerging Technologies List and, once again, ITA will participate in the project. David Cieslak, a member of the task force working on this project, will lead discussion and debate on what items are important and should appear in the list, and in what order. A formal vote will be conducted and the results will be the center of a major AICPA news release and visibility campaign that will recognize the role of the ITA in its development. Prior to the session, attendees will be provided with a working draft of the list and given an opportunity to add items for consideration in the session. Come be part of history in the making.

David M. Cieslak, CPA, CITP, GSEC - Information Technology Group, Inc.

2:15^{PM} - 3:15^{PM}

Concurrent Sessions

Keynote for Consultants
YOU Don't Need No Stinkin' Timesheets!!

Ron Baker, well known speaker and writer on Value-Based Pricing and Throwing Away the Timesheet in professional services firms, will close our meeting with a lively presentation of his very controversial thoughts and arguments. Ron would have us believe that keeping an "hours-based mentality and billing system" is holding us back and sending all the wrong messages to our clients and prospects. Could he be right? Is there a better way to run your practice? Ron will give us all something to really think about on that long ride home.

Ron Baker - VeraSage Institute

2:15^{PM} - 3:45^{PM}

For Internal Tech Leaders
Backup Vendor Presentations

Leading backup vendors will demonstrate their ability to effectively backup on laptops, desktops and servers. Attend this session to learn more about their offering.

Greg Nuss - CommVault Systems, Inc.

Dave Johnson - CommVault Systems, Inc.

3:15^{PM} - 3:45^{PM}

Concurrent Sessions

For Consultants
Financial Benchmarking – Our Pursuit of the Golden Fleece

As promised last spring, this session will focus everyone on getting ready to participate in our annual benchmarking process this winter. We will review the terminology, cover the input gathering process and form(s), and we will talk about the expected reporting that will follow the compilation effort. We also plan to review with you the results of the actual work a couple of member firms have put into our new process. Benchmarking is one of the key value drivers of ITA, and this session will help us take another giant step in making it a natural part of being in the ITA.

Rondol E. Eagle - Information Technology Alliance

Loren Eckart - iLumen

3:45^{PM} - 4:00^{PM}

Internal Tech Leaders Track Wrap Up

3:45^{PM} - 4:30^{PM}

ITA Business Meeting & Collaborative Close

ITA Report
Ron Eagle - ITA President

Membership Committee Report
Chair, Jan Goodman - Forepoint