



April 28-30, 2019

Westin Chicago River North, Chicago, IL

#ITASpring19



Sunday, April 28

|         |         |  |
|---------|---------|--|
| 1:00 PM | 3:00 PM | Optional Volunteer Events with i.c. stars  |
| 2:30 PM | 5:00 PM | Badge Pickup - Grand Ballroom Foyer  |
| 3:30 PM | 4:30 PM | Meet, Greet & Eat Session for New Members and First Timers - Room?   |
| 4:30 PM | 6:00 PM | ITA GENERAL SESSION - Grand Ballroom<br>President's Welcome - Stan Mork, ITA President<br>Keynote: Engagement: The Power, And Potential Of Our Personal, Civic And Business Connections - Sandee Kastrul |
| 6:00 PM | 7:30 PM | Sunday Night Welcome Reception - Grand Ballroom Foyer  |
| 7:30 PM |         | Dinner On Your Own and Various Partner Events  |

Monday, April 29

|                         |          |  |   |  |   |   |
|-------------------------|----------|--|---|--|---|---|
| 7:00 AM                 | 5:00 PM  | Badge Pickup - Grand Ballroom Foyer  |   |  |   |   |
| 7:00 AM                 | 8:00 AM  | Breakfast - Astor Ballroom   |   |  |   |   |
| 8:00 AM                 | 9:30 AM  | Monday Morning General Sessions - Grand Ballroom<br>ITA's Leadership Alliance (ILA) Graduation Recognition - Stan Mork, ITA President<br>Keynote: MATTER - Create More Value, Move Beyond The Competition And Become The Obvious Choice! - Peter Sheahan |   |  |   |   |
| <b>MONDAY WORKSHOPS</b> |          | <b>WORKSHOP 1</b><br>Grand A   | <b>WORKSHOP 2</b><br>Grand C                        |  | <b>WORKSHOP 3</b><br>Promenade AB   | <b>ITL CIO ACADEMY</b><br>Promenade C<br><i>Closed Session for ITL CIOs or Their Designee - One Per Firm</i>                        |
| 10:00 AM                | 12:00 PM | The Future Ready Accounting/Consulting Firm Workshop   | Mental Toughness For The Corporate Athlete Workshop |  | Get A Grip On Your Business: Six Keys To Getting What You Want From Your Entrepreneurial Company Workshop | CIO Academy: Understanding The Role Of The Leader In Accelerating Transformation<br>Peter Sheahan                                   |
| 12:00 PM                | 1:15 PM  | Luncheon - Astor Ballroom  |   |  |   |   |
| 1:15 PM                 | 3:15 PM  | The Future Ready Accounting/Consulting Firm Workshop   | Mental Toughness For The Corporate Athlete Workshop |  | Get A Grip On Your Business: Six Keys To Getting What You Want From Your Entrepreneurial Company Workshop | CIO Academy: FLIP - Proven Strategies for Turning Challenge into Opportunity and Change into Competitive Advantage<br>Peter Sheahan |
| 3:30 PM                 | 5:00 PM  | Insight Into The Mind Of Today's Buyer Customer Panel<br>Grand A   |   | The Future of CAS: Industry Perspectives From Leading Publishers And Practitioners<br>Promenade AB | ILA SIG: Leading Sideways - Leading Up<br>Grant/Lincoln   | ITL Tactical Roundtables<br>Grand B   |
| 6:00 PM                 | 9:00 PM  | A Taste of Chicago Dinner Party - Room Will be Announced on Sunday based on weather  |   |  |   |   |

Tuesday, April 30

|                              |   |   |  |  |  |   |
|------------------------------|---|---|--|--|--|---|
| 7:00 AM                      | 8:00 AM                                     | Breakfast - Astor Ballroom  |  |  |  |   |
| <b>TRACKS &amp; SESSIONS</b> | <b>Consulting &amp; Reselling (CR)</b>      |   | <b>CLIENT ACCOUNTING AND ADVISORY SERVICES (CAS) TRACK</b><br>Promenade A/B                | <b>ITL SPECIAL INTEREST GROUPS (SIG)</b><br>Grant/Lincoln  | <b>Internal Tech Leaders Sessions</b>  |   |
|                              | <b>CR TRACK 1 &amp; Combined</b><br>Grand A | <b>CR TRACK 2</b><br>Grand B  |  |  | <b>ITL TACTICAL</b><br>Grand C   | <b>ITL STRATEGIC</b><br>Promenade C   |
| 8:00 AM                      | 9:15 AM                                     | How To Communicate The Value Of The Cloud To Clients  | Your Customer's Journey: Watching It Happen, Making It Happen, or Wondering What Happened? | Innovative Approaches Or Scaling And Growing Your CAS Practice   | Project Management SIG: Changes In The Project Manager Role - From IT Project Manager To Technical Product Manager | March Madness: Busy Season Breakdown<br><br>CIO ITL Metrics Workshop  |
| 9:30 AM                      | 10:45 AM                                    | Service Diversification - Is A New Work Area Worth It? Or Just More Work?   | Vendors And VARs - Love Story OR Nightmare?  | Get On Board Or Get Outta The Way: Successful Strategies For Securing Buy In From Clients & Colleagues | APP DEV SIG: Why Data Warehousing And Business Intelligence Go Hand In Hand  | Managing The Service Desk In The 21st Century - Problem Management in The Service Desk  |
| 11:00 AM                     | 12:15 PM                                    | Delivering Products And Services Via Subscription   | Harnessing the Competitive Power of Industry Specialization                                | Virtual CFO In Action  | Digital Transformation SIG: RPA Real World Experience  | The Changing Face Of Staffing<br><br>Continuation Of ITL Metrics Workshop (if needed) OR Attend ITL SIG or ITL Tactical Track |
| 12:15 PM                     | 1:30 PM                                     | Luncheon - Astor Ballroom   |  |  |  |   |
| 1:30 PM                      | 3:00 PM                                     | Publisher CR Round Tables: The Good, Bad, And Ugly Of Your Partnership With Publishers<br>Grand A   |  | CAS Roundtables  | ITL Tactical Roundtables   | ITL Strategic Roundtables   |
| 3:00 PM                      | 3:15 PM                                     | CR Wrap Up Session - Grand A  |  | CAS Wrap Up Session - Promenade A/B  | ITL Wrap Up Session - Grand C  |   |
| 1:00 PM                      | 5:00 PM                                     | Strategic Leadership Association (SLA) Session (Note: Separate Registration required) - Riverfront Room<br><i>Topic: From Fighting Fires to Fire Insurance: Transforming to a Subscription-Based Business Model</i> |  |  |  |   |

Wednesday, May 1

|         |         |   |
|---------|---------|---|
| 8:30 AM | 3:00 PM | ITA Leadership Alliance (ILA) Base Camp (Note: Separate Registration required) - Grant / Lincoln  |
| 8:00 AM | 4:00 PM | Strategic Leadership Association (SLA) Session (Note: Separate Registration required) - Riverfront Room<br><i>Topic: From Fighting Fires to Fire Insurance: Transforming to a Subscription-Based Business Model</i> |



## Session Descriptions and Speakers

Consulting & Reselling – CR

Client Accounting and Advisory Services - CAS

ITA Leadership Alliance Alumni SIG – ILA

Project Management SIG – PM

ITA Leadership Alliance - ILA

Application & Development SIG – APP-DEV

Digital Transformation SIG - DA

Internal Technology Leader Tactical – ITL-T

Internal Technology Leader Strategic – ITL-S

Strategic Leadership Association - SLA

### Sunday, April 28 - 4:30 to 6:00 pm - Welcome and Sunday Keynote

**4:30 – 4:45 pm**

#### **President's Welcome**

*Stan Mork – ITA President*

ITA President Stan Mork will introduce our Spring Collaborative Committees and welcome our new members and guests. He will also provide an overview of the Spring Collaborative agenda prior to introducing our Sunday night keynote sponsor, Intuit

**4:45 – 6:00 pm (75 CPE)**

#### **Engagement: The Power, And Potential Of Our Personal, Civic And Business Connections**

*Sandee Kastrul, President – i.c.stars, Chicago, IL*

Sandee Kastrul will share her perspectives on how we as IT leaders can improve our personal and professional lives by being engaged in the community. Since 1999, i.c.stars has been identifying, training, and jump-starting technology careers for Chicago-area low-income young adults who, although lacking access to education and employment, demonstrate extraordinary potential for success in the business world and for impact in their communities. Sandee has a unique perspective on technology training and people development. You'll walk away with some new ideas on recruiting, volunteerism, diversity and inclusion.

### Monday, April 29 – 8:00 – 9:30 am - Monday Morning General Session & Keynote (70 CPE Minutes)

**8:00 – 8:20 am**

#### **ITA's Leadership Alliance (ILA) Graduation**

*Stan Mork – ITA President*

ITA President Stan Mork will present the 2018-19 Class of the ITA's Leadership Alliance (ILA) with their graduation certificates.

**8:20 – 9:30 am (70 CPE Minutes)**

#### **MATTER: Create More Value, Move Beyond The Competition And Become The Obvious Choice!**

*Peter Sheahan, Founder and Group CEO - Karrikins Group, Denver, CO in the USA*

As the pace of commoditization accelerates and the emergence of technological disruption threatens our existing business models, we must find ways to remain relevant and differentiated in the hearts and minds of our customers! This inspiring, case-study rich session will show you how to find opportunity in disruption to reverse the downward spiral of commoditization and matter more to your customers than your competition.

## Deep Dive Workshops

**Monday, April 29 - 10:00 am – 3:15 pm (with lunch from Noon to 1:15) – (240 CPE Minutes)**

### **The Future Ready Accounting/Consulting Firm Workshop**

*Tom Hood – Executive Director & CEO of Maryland Association of CPAs and Business Learning Institute*

Recent research says that the business environment for professional service firms and their clients will be characterized by “unprecedented, massive and highly accelerated change” through 2025. To thrive in this new age of hyper-change and growing uncertainty, it is now an imperative to learn a new competency: how to accurately anticipate the future. Using the concepts from The Anticipatory Organization™ Model created by Daniel Burrus and Burrus Research, Tom will lead an interactive Workshop that does not just highlight the latest trends but provides tools on how you can anticipate future trends and leverage these trends to find new service opportunities.

### **Mental Toughness For The Corporate Athlete Workshop**

*Chris Dorris – Mental Toughness and Business Success Coach, Chandler, AZ*

Clarity, Courage and Discipline - these are the ingredients of success. And, Chris Dorris defines success as having your life on your terms. Given that real success requires Mental Toughness, you can make the argument that these are also the three major components of Mental Toughness. Clarity, Courage and Discipline - a formula that Chris has been developing over 20 years of coaching business leaders and professional athletes. In this Workshop, Chris will take us through the key concepts of developing Mental Toughness skills that will us become stronger leaders and improved client service professionals.

### **Get A Grip On Your Business: Six Keys To Getting What You Want From Your Entrepreneurial Company Workshop**

*Mike Paton – EOS Worldwide, Minneapolis, MN*

Mike Paton discovered the Entrepreneurial Operating System® (EOS) a dozen years ago while trying to take a \$7 million company to the next level. Having helped run four entrepreneurial companies, Paton instantly recognized the power of this simple, holistic “way of operating” a small business. Since then, Paton has conducted more than 1,200 full-day sessions with the leadership teams of more than 110 companies. During that journey, Paton wrote “Get A Grip: An Entrepreneurial Fable” with Gino Wickman and then succeeded Gino in the role of Visionary for EOS Worldwide. In this session, he will lead the Workshop participants in a variety of exercises to help you take back the key concepts of EOS back to your organizations.

### **Understanding The Role Of The Leader In Accelerating Transformation**

**(Closed Session for ITL CIOs or Their Designee – One Per Firm)**

*Peter Sheahan, Founder and Group CEO - Karrikins Group, Denver, CO in the USA*

The role of technology in organizational transformation is changing – from resilient solutions that support the enterprise to agile products that drive revenue. This has made the CIO more important than ever. Some CIOs might feel trapped by the legacy of their role as a support function, but there is an incredible opportunity to embrace this ongoing change and lead the transformation of both themselves and their organizations.

In this interactive, case study-rich session, Peter Sheahan will dive deep into how CIOs can become powerful symbols for change. Using his decades of experience in studying and leading organizational change, he will explore the internal transformation that CIOs need to undertake in order to lead their organizations to the future. Through exercises and personal reflection, Peter will lead them through their own journey of transformation, inspiring them to find opportunity, unleash their ambition, and align their teams, because organizations don’t transform – leaders do.

# Concurrent Sessions – By Date and Time

**Monday, April 29 – 3:30 – 4:45 pm - (75 CPE Minutes)**

## CR-1 & 2

### Insight Into The Mind Of Today's Buyer – Customer Panel

**Moderator:**

*Shawn P. Slavin – CS3 Technology, Tulsa, OK*

**Panelists:**

*Jay Burrell – Vice President & COO, TRI Industries, Chicago*

*Anne Gruber – President, Ashland Lock and Door, Chicago*

*Dan Miller – Chief Information Officer, Novack Construction, Chicago*

*Bryan Schmidt – Controller, UNITE HERE HEALTH, Chicago, IL*

The world keeps changing and yet the more they change, the more they stay the same. Resellers and Publishers must continue to adapt to new realities of what customers want and how they want to be served.

This session will provide you an opportunity to hear from the C-suite of current and future consumers of applications and services.

Here is a sample of some of the things that will be discussed:

- How does your organization currently leverage technology? (back office, line-of-business, communications, internal community, etc.)
- How do you identify needs and determine where and how to look for a solution?
- How would you describe the kind of relationship are you looking for from the company you ultimately buy from?
- What roles do you want inside and outside resources to play in an implementation?
- Share your envisioned 'Journey' after your deployment. What role do you want your software partner to play? What role do you want your software publisher to play? How do you see your company maximizing your return from your investment?

## CAS

### The Future of CAS: Industry Perspectives From Leading Publishers And Practitioners

**Facilitator:**

*Stan Mork – ITA President*

**Panelists:**

*Stone de Souza – Sage, Atlanta, GA*

*Michael Cerami – CPA.Com / AICPA, New York, NY*

*Michael Kulisch – Oracle NetSuite, San Mateo, CA*

Client Accounting and Advisory Services have become one of the hottest practice areas in the accounting technology industry.

We've assembled a panel of experts from some of the leading publishers (Sage, NetSuite and Intuit) along with some CAS practitioners to provide their perspectives on where the industry and the CAS service line is moving over the next 3-5 years and what it will take to stay competitive and relevant to clients. Join us for this interactive discussion that will include plenty of time for audience questions.

## ILA

### (Open to Everyone)

### ITA Leadership Alliance SIG: Leading Sideways – Leading Up

*Bret Romney, Ascend Strategies*

Leadership happens in all directions. Effectively leading those who report to us requires certain skills and experience. But often, our greatest leadership opportunities and challenges come from our peers or those in authority over us. To lead them effectively can require a different mindset, skillset and approach. This highly interactive session will focus on how to effectively lead sideways (your peers) and up (those in authority above you). The format will be both group instruction and table case study brainstorming. We will explore:

- What serves as the foundation to successfully lead sideways and up
- The mindset you'll need to be successful
- The specific skills critical to your success
- Different approaches for different situations

## ITL-T

### ITL Tactical Roundtables

**Coordinator:**

*Stan Mork – ITA President*

The ever-popular ITL Tactical Roundtables for this Collaborative will be those listed below along with the Table Leaders. Discussion topics will be provided for each table...or feel free to branch out on your own!

- **Application Development** – *Gregory Gunderman, CohnReznick, Roseland, NJ*
- **Infrastructure** – *Matt Jennings, Baker Tilly, Madison, WI*
- **Service Delivery, Metrics and Support** – *Mark Moore, Crowe LLP, Oakbrook Terrace, IL*
- **Project Management** – *Alisa Moore, CBIZ, Inc. Cleveland, OH*
- **Security/Compliance** – *Brian Prascius, Plante Moran, Southfield, MI*

## ITL-S

### ITL Strategic Roundtables

**Facilitator:**

*David Hirschhorn – Eide Bailly LLP, Fargo, ND*

Our ITL Strategic Roundtables provide an opportunity for the ITL CIOs to discuss current topics and issues with their peers. The roundtable makeup, format and topics is determined by the Spring ITL Planning leaders and will be distributed to the participants prior to the session.

**Tuesday, April 30 – 8:00 – 9:15 am - (75 CPE Minutes)**

## CR-1

### How To Communicate The Value Of The Cloud To Clients

**Facilitator:**

*Igal Rabinovich – Net@Work, New York, NY*

**Panelists:**

*Tyler Bower – Net@Work, New York, NY*

*James Bourke - WithumSmith+Brown, Red Bank, NJ*

*David Hynek – Business Fitness, Inc., Mequon, WI*

*Michael Silver – Microsoft, Downers Grove, IL*

How to Communicate the Value of the Cloud to our Clients - We are often talking to our clients about cloud-based solutions such as ERP, CRM, VOIP, etc. but what are we really doing to educate and inform them about the value of cloud computing to their businesses? There are a lot of client misperceptions about what the cloud is, what the difference are between cloud vs. subscription pricing, hybrid cloud, hosting, etc. How can we improve how we educate our clients on the true value of these technologies from a business perspective?

- Understand what your clients think of when they hear Cloud
- Align characteristics / value of Cloud to organizational roles
- Align value of Cloud to business objectives
- Different “Clouds” for different business types - cloud vs. subscription pricing, hybrid cloud, hosting, etc.
- What gets lost in the noise – the biggest opportunities driven by “Cloud” that clients are not leveraging

## CR-2

### Your Customer's Journey: Watching It Happen, Making It Happen, or Wondering What Happened?

#### Facilitators:

*Mark Severance – RKL eSolutions LLC, Simi Valley, CA*

#### Panelists:

*Alan Clark – Eide Bailly LLP, Salt Lake City, UT*

*Scott Hollrah – Venn Technology, Grapevine, TX*

*Karen Riordan – SSi Consulting, Vienna, VA*

As our clients increasingly move to subscription-based solutions, it's more critical than ever that we take great care of them. This is no small task. With hundreds of clients, various personalities, short attention spans, personnel changes, and the tyranny of the urgent, how can we strategically guide our customers to maximize the value of their current software, potential add-on products, and our consulting services?

Come prepared for an interactive session designed to share ideas and provide inspiration for how we can best proactively lead our customers on a successful and profitable journey from beginning to end.

- Define the "customer journey" and understand why it's important
- Create greater customer engagement and satisfaction
- Increase the lifetime value of the customer

## CAS

### Innovative Approaches To Growing Your CAS Practice

#### Facilitator:

*Tom Hood, Executive Director & CEO of Maryland Association of CPAs and Business Learning Institute*

#### Panelists:

*Kimberly K. Blascoe – Wipfli LLP, Rockford, IL*

*Jenni Huortari – Eide Bailly LLP, Fargo, NC*

You've built up a nice, profitable CAS practice over the past few years. So, what's next? How do you take your practice to the next level? Is it by increasing the scale of what you have, is it by adding new products and services to expand your reach or is it moving into a completely new area of services? In this interactive discussion, you'll gain new perspectives on how you to continue to grow your practice while maintaining the high quality services to your existing clients.

## PM

### Project Management SIG: Changes In The Project Manager Role – From IT Project Manager To Technical Product Manager

#### Facilitator:

*Kevin Fraase - Eide Bailly LLP, Fargo, ND*

#### Panelists:

*Caryn Gerry - Cherry Bekaert LLP, Richmond, VA*

*Brian Jackson – Crowe LLP, Oak Brook, IL*

As the IT operations in our firms adapt to the new innovation paradigm, the IT project manager has evolved to become a role of technical product manager. Beyond the typical activities involved with managing projects, project managers are increasingly asked to become subject matter experts, manage complicated software licensing and research additional solutions that complement the software platform. In this session our panelists will discuss changes they have made to their project management teams and how their responsibilities have changed.

## ITL - T

### March Madness: Busy Season Breakdown

#### Facilitators:

*Nick Cadden - Carr, Riggs & Ingram, LLC, Enterprise, AL*

*Jan Milden - Plante Moran, Southfield, MI*

From all accounts, it's been a challenging busy season in most CPA firms. Join us for this facilitated group discussion, where we'll discuss some of the hot topics that IT teams dealt with during the most recent busy season. Prior to the Collaborative, our facilitators will be sending a survey to all of our ITL members to get their perspectives on busy season challenges and the areas they would like to see be part of our discussion in this breakout. We'll come up with 5-6 key topic areas and will engage the group in an interactive discussion of the lessons learned by our member firms. Bring your mobile device and be prepared to participate in an interactive, real-time feedback experience!

## ITL – S

8:00 am – 12:15 pm (225 CPE Minutes)

### CIO ITL Metrics Workshop

*Paul Blowers – Plante Moran, Southfield, MI*

*Stan Mork – ITA President*

At a one day workshop following the Fall Collaborative, the ITL CIOs met to discuss potential changes to the ITA metrics process. Since that initial meeting, a subgroup of CIOs met in February to further define the ITA Metrics 2.0 initiative. During this interactive session, the ITA Metrics committee will present the first draft of the new ITA financial metrics template and obtain feedback from the full group on whether the new metrics template will meet the needs of the CIO group. Additionally, we will further discuss the definitions of the various metric categories to ensure that whatever we collect and report in the future is consistent across our member firms. At the end of this session, we will discuss the next steps to be completed prior to the Summer ITL meeting in July.

**Tuesday, April 30 – 9:30 – 10:45 am - (75 CPE Minutes)**

## CR-1

### Service Diversification - Is A New Work Area Worth It? Or Just More Work?

#### Facilitators:

*Kevin Martin – Martin & Associates, Cincinnati, OH*

*Dominic Pernai – Cornerstone Solutions, Chicago, IL*

#### Panelists:

*Todd Perlman – Business Technology Partners, LLP, Deerfield, IL*

*Michael Senkbeil – Chortek LLP, Waukesha, WI*

*Brian Terrell - BTerrell Group, LLP, Addison, TX*

Service Diversification – Is chasing that new shiny object (new revenue source) productive and worth the financial risk? Explore this first hand with our ITA member panelists and be ready to interject your experiences in creating a new revenue source for your company. Many of us have tried or are doing some manner of diversification – be it in CRM, AI, BPO, Financial Analytics, Managed Service or others. After completing this course, you will be able to:

- Understand how to measure your success
- Understand when to cut loose a new area that is not productive
- Know what type of staff are needed to lead a new area, and really make it work
- See if staff can be experts in two solutions, and make money
- Stay out of the challenges that smaller firms have to encounter

## CR-2

### Vendors And VARs – Love Story OR Nightmare?

#### Facilitators:

*John Rudow – The Rudow Group, Inc. Redondo Beach, CA*

#### Panelists:

*Geoff Ashley – Acumatica, Bellevue, WA*

*Patricia Bennett – PC Bennett Solutions, North Bend, WA*

*Tyler Church – Infor, San Diego, CA*

*Melissa Craig – Avalara, Atlanta, NC*

*Amy Knust – Eide Bailly LLP, Lincoln, NE*

*Cory Rhodes – Single Source Systems, Inc., Fishers, IN*

During this panel presentation, hear perspectives from both vendors and VARs on the role of the Partner Account Manager and how both sides can best work together to achieve mutual success. Multiple vendors and VARs of all types and sizes will candidly share their experiences, lessons learned and best practices. The goal for this session is to provide everyone insight into the needs of both parties, what works and what doesn't, so we can all better manage this important relationship.

## CAS

### Get On Board or Get Outta the Way: Successful Strategies for Securing Buy-in from Clients & Colleagues

#### Facilitators:

*Kimberley Austin – Intuit, Irvine, CA*

*Michael Kulisch – Oracle NetSuite, San Mateo, CA*

The stats are in, Accounting Services and Outsourcing offerings are the clear pathway to exponential growth for today's firms. As more firms expand their CAS practice, it becomes evident that cloud technology must play a starring role in the process, in order to provide the ability to scale. Yet we still face battles on a daily basis from internal & external forces: Partners don't want to change; front line staff professionals don't know the product (or think that technology will replace them); and clients are convinced that all their data will be compromised if it's in the cloud.

## APP-DEV

### APP DEV SIG: Why Data Warehousing And Business Intelligence Go Hand In Hand

#### Facilitators:

*Danielle Gallo – CohnReznick, Roseland, NJ*

*Curtis Shelton – CBIZ, Inc., Cleveland, OH*

#### Panelists:

*Robert Jamison – Elliott Davis, LLC, Greenville, SC*

*Patrick Powers – Crowe LLP, South Bend, IN*

Business Intelligence and Data Warehousing are two important pillars in the success of an enterprise. BI and DW technologies provide the foundation for enabling educated, data-driven decision-making at the highest levels of an organization. In this session, we'll define both BI and DW, outline the maturity cycle for these technologies, and talk to some of our member firms about where they are in that cycle and what both their challenges and successes have been throughout their journey. Be ready to come with questions and insights of your own!

## ITL - T

### Managing The Service Desk In The 21st Century - Problem Management In The Service Desk

#### Facilitator:

*Mark Moore – Crowe LLP, Oakbrook Terrace, IL*

#### Panelists:

*Gabe Hartman – BDO USA, LLP, Grand Rapids, MI*

*Opal Shaw – CohnReznick, Roseland, NJ*

*Samuel Soper – Wipfli LLP, Eau Claire, WI*

"Problem Management" is part 2 of a 4 part series of Managing the Service Desk in the 21st Century. To maintain an effective service desk, IT service providers should have a process in place that is continually working to optimize IT services. In this session focused on Problem Management, we'll discuss a variety of topics related to managing problem management in the Service Desk.

## ITL – S

**8:00 am – 12:15 pm (225 CPE Minutes)**

### CIO ITL Metrics Workshop -- Continued

*Paul Blowers – Plante Moran, Southfield, MI*

*Stan Mork – ITA President*

At a one day workshop following the Fall Collaborative, the ITL CIOs met to discuss potential changes to the ITA metrics process. Since that initial meeting, a subgroup of CIOs met in February to further define the ITA Metrics 2.0 initiative. During this interactive session, the ITA Metrics committee will present the first draft of the new ITA financial metrics template and obtain feedback from the full group on whether the new metrics template will meet the needs of the CIO group. Additionally, we will further discuss the definitions of the various metric categories to ensure that whatever we collect and report in the future is consistent across our member firms. At the end of this session, we will discuss the next steps to be completed prior to the Summer ITL meeting in July.



## **CR-1**

### **Delivering Products And Services Via Subscription**

**Facilitator:**

*Ron Baker – VeraSage Institute, Petaluma, CA*

**Panelists:**

*Patricia Bennett – PC Bennett Solutions, North Bend, WA*

*Shawn P. Slavin – CS3 Technology, Tulsa, OK*

A recurring revenue model is a growing trend where businesses make money by trading access to products or services for regular, scheduled payments. As companies and business owners become more familiar with paying subscription for products and services, and more businesses move to this recurring revenue model, how do we repackage our existing products and services to match up with the new business model used by the publishers that we work with? This session will include a panel of company leaders who are making progress in moving to recurring revenue models and who will share information on their transition.

As we look at this model, there are a lot of questions and concerns that present themselves.

- What are the pros and cons for the VAR and the customer?
- What are the benefits and the pitfalls and is it worth it?
- Is this a model that will work for every company?
- Is there a one-size fits all model, or are their different revenue models that may benefit my company?
- What is this change going to cost?
- What are the challenges and frequently heard objections?

Come prepared to ask questions and to share your successes and failures in moving to this model. This can be a game changer if it's done successfully.

## **CR-2**

### **Harnessing The Competitive Power Of Industry Specialization**

**Facilitator:**

*Christi Whipple – Avalara, Irvine, CA*

**Panelists:**

*Joseph Arnone – BAASS Business Solutions Inc., Thornhill, ON, Canada*

*Dominic Pernai – Cornerstone Solutions, Chicago, IL*

*Michael Silver – Microsoft, Downers Grove, IL*

Trying to be everything to everyone is not only a logistical challenge, but it also puts you at a competitive disadvantage. Focusing on specific industries and micro-verticals helps you become an expert at your craft, hone in on the perfect potential customer, and attract those ideal buyers. In this session you'll hear from a panel of consulting firms and publishers who have experience building and operationalizing an industry-specific, go-to-market approach. They'll share what they've learned and be prepared to answer any questions you have to ultimately help you build out or improve your own industry-specialized strategy.

## **CAS**

### **Virtual CFO In Action**

**Facilitator:**

*Kevin Cumley – Sage Intacct, Montana City, MT*

**Panelists:**

*Sharon Berman – Rehmann Robson, Farmington Hills, MI*

*Stone de Souza – Sage, Atlanta, GA*

As today's progressive firms strive to move upmarket with their outsourced accounting and advisory services, many are unsure what approach to take. In this session, a panel of top industry leaders in the CAS space that are providing Virtual CFO services for their clients will share best practices and insights on how to have success in high value engagements. They will discuss how to win this type of business and the right strategy for success. In addition, they will share how technology helps enable them to provide the required strategic level insights for their clients expected from a CFO level engagement.

## DA

### Digital Transformation SIG: RPA Real World Experience

#### Featured Panelist:

*Peter J. Scavuzzo – Marcum LLP, NY, NY*

#### Other Panelists:

*Kevin Fraase, Eide Bailly LLP, Fargo, ND*

*Danielle Gallo – CohnReznick, Roseland, NJ*

*Gabe Hartman – BDO USA, LLP, Grand Rapids, MI*

Robotic Process Automation lies at the center of Digital Transformation. This session will take a deep dive into RPA in the real world - how it was used, how the process being automated was identified, what the issues were related to execution, and what was the end result. You'll hear from our own member firms' experiences. The focus will be on design, development and implementation, not the features/functions of specific tools. Come prepared with questions and to discuss your own RPA experiences.

## ITL - T

### The Changing Face Of Staffing

*Brian Prascius, Plante Moran, Southfield, MI*

*Curtis Shelton – CBIZ, Inc., Cleveland, OH*

For decades, the typical IT organization has been organized into vertical stacks and it has served the business well. With the abundance of Cloud services and providers, your infrastructure environment has transformed from one that was relatively easy to envision and manage, to one that is distributed and co-managed.

## ITL – S

### 8:00 am – 12:15 pm (225 CPE Minutes)

*Paul Blowers – Plante Moran, Southfield, MI*

*Stan Mork – ITA President*

### CIO ITL Metrics Workshop -- Conclusion

At a one day workshop following the Fall Collaborative, the ITL CIOs met to discuss potential changes to the ITA metrics process. Since that initial meeting, a subgroup of CIOs met in February to further define the ITA Metrics 2.0 initiative. During this interactive session, the ITA Metrics committee will present the first draft of the new ITA financial metrics template and obtain feedback from the full group on whether the new metrics template will meet the needs of the CIO group. Additionally, we will further discuss the definitions of the various metric categories to ensure that whatever we collect and report in the future is consistent across our member firms. At the end of this session, we will discuss the next steps to be completed prior to the Summer ITL meeting in July.

**Tuesday, April 30 – 1:30 – 3:00 pm - (90 CPE Minutes)**

## CR – 1&2

### Publisher CR Round Tables: The Good, Bad, And Ugly Of Your Partnership With Publishers

#### Facilitator:

*Shawn P. Slavin – CS3 Technology, Tulsa, OK*

*Back by Popular Demand! This roundtable session was a big hit at last Fall's Collaborative, so we are giving you the opportunity to continue the discussion. Working with software publishers is becoming increasingly challenging. Join your peers at private tables organized by publisher to share successes, insights and pitfalls of working with publishers like Oracle NetSuite, Sage, Microsoft, SAP, and Acumatica. In this session, you will have the opportunity to candidly discuss your relationship with your publisher with other firms that are partners as well. Learn how firms have been successful in their relationships with publishers. Also learn about things to watch for and the "gotchas" of the partnerships.*

## CAS

### CAS Roundtables

**Facilitators:**

*Kimberley Austin – Intuit, Irvine, CA*

*John Foster – Sage, Atlanta, GA*

The staff you have are experts in the staff, with deep technical knowledge. As we continue our move into the Cloud world, do they have the needed skills to manage and hold vendors accountable? How is their role evolving? What will the business expect from these groups in the coming years and are you prepared? Will you be prepared?

## ITL-T

### ITL Tactical Roundtables

**Coordinator:**

*Stan Mork – ITA President*

Join us as we gaze into our crystal balls based upon some Gartner research and discuss some potential expectations that business have of IT and how they will impact the future of IT staffing.

- **Application Development** – *Gregory Gunderman, CohnReznick, Roseland, NJ*
- **Infrastructure** – *Matt Jennings, Baker Tilly, Madison, WI*
- **Service Delivery, Metrics and Support** – *Mark Moore, Crowe LLP, Oakbrook Terrace, IL*
- **Project Management** – *Alisa Moore, CBIZ, Inc. Cleveland, OH*
- **Security/Compliance** – *Brian Prascius, Plante Moran, Southfield, MI*

## ITL-S

### ITL Strategic Roundtables

**Facilitator:**

*David Hirschhorn – Eide Bailly LLP, Fargo, ND*

Our ITL Strategic Roundtables provide an opportunity for the ITL CIOs to discuss current topics and issues with their peers. The roundtable makeup, format and topics is determined by the Spring ITL Planning leaders and will be distributed to the participants prior to the session.

**Tuesday, April 30 – 3:15 – 3:30 pm**

## Wrap Up Sessions & Adjournment of the ITA Spring Collaborative

### CAS

*Facilitator: Stan Mork, ITA*

### ITL

*Facilitator: Lissa Johnsen, ITA*

### CR

*Facilitator: Shawn P. Slavin, Conference Chair - CS3 Technology, Tulsa, OK*

# Additional Post Meeting Events

**Note:** Separate Registration Required for Strategic Leadership Association (SLA)  
and for ITA Leadership Alliance (ILA)

**Tuesday, April 30 – 3:15 – 3:30 pm AND Wednesday, May 1 – 8:00 – 4:00 pm**

## Strategic Leadership Association (SLA)

### From Fighting Fires to Fire Insurance: Transforming to a Subscription-Based Business Model

#### Facilitators:

*Ed Kless, Senior Director, Partner Development and Strategy, Sage, Allen, TX*

*Ron Baker, VeraSage Institute, Petaluma, CA*

The barber, blacksmith, butcher, baker, and candlestick maker used to have an intimate knowledge their customers. This tacit knowledge got lost in the Industrial Revolution. It is now coming back. The world is moving from products and services to subscriptions, favoring access and transformations over ownership and deliverables. Customization, not standardization, constant improvement and innovation, not planned obsolescence. McKinsey reports that the subscription ecommerce market has grown by more than 100% per year for past five years. Further, subscription-based companies are growing eight times faster than the S&P 500 Index (17.6% vs. 2.2%), and five times faster than US retail sales (17.6% vs. 3.6%).

The advantages to a subscription model are many, including: Predictable revenue; not selling services, but creating annuities with a lifetime value that far exceeds whatever you paid to acquire them; collective knowledge of your customers, which is a competitive advantage that cannot be duplicated; one-to-one marketing; not pricing a product or service, but rather customer transformation and peace of mind; you can predict demand and plan capacity more effectively; and it breaks down silos and creates a true “one-firm” model.

#### Objectives:

- Identify strategies utilized by businesses that have made the transition to a subscription-based model
- An in-depth exploration of the nine types of subscription business models
- The psychology of selling subscriptions
- How to develop new metrics and accounting information to represent the economics of a subscription business

#### Major Subjects

- The three types of adoption approaches to creating a subscriber base
- Five approaches to value nurturing—that is, what happens after the sale to help customers achieve success and realize value
- Ten best practices to reduce churn (i.e., losing subscribers)
- Essential growth strategies to deploy

To Register for SLA: [CLICK HERE](#)

**Wednesday, May 1 – 8:30 – 3:30 pm**

## **ITA Leadership Alliance (ILA)**

**Facilitator:**

*Bret Romney, Ascend, Montana City, MT*

Building leadership is critical to the near term and long term success of your firm. ITA's Leadership Alliance (ILA) is designed to accomplish the following goals:

- To awake and enhance a desire to grow as leaders
- To provide tools that foster leadership development and unleash potential
- To develop deep peer interaction – ideas, sounding board and support
- To improve communication
- To facilitate more successful succession – leadership and ownership
- To grow the next leaders of ITA members

This is What Makes ILA Valuable:

1. Leadership Base Camps, Teleconferences and Leadership Roundtables
2. Personalized Leadership Development Plan
3. Coaching and Mentoring
4. Book Reviews

**To Register for ILA: [Click Here](#)**



## NASBA Registry Information

**Credit Hours:** Up to 15.8 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.

**Field of Study:**

Business Management and Organization

**Level** – Update

**Prerequisites** – Minimum 3 Years as an IT Consultant or Technician

**Advance Preparation** – None

**Instructional Delivery Method** – Lecture & Discussion

**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](http://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, 514 Daniels Street, Suite 361, Raleigh, NC 27605, Telephone (480) 515-2003.