



Sunday, April 28

1:00 PM	3:00 PM	Optional Volunteer Events with i.c. stars
2:30 PM	5:00 PM	Badge Pickup
3:30 PM	4:30 PM	Meet, Greet & Eat Session for New Members and First Timers
4:30 PM	6:00 PM	ITA GENERAL SESSION President's Welcome - Stan Mork, ITA President 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
7:30 PM		Dinner On Your Own and Various Partner Events

Monday, April 29

7:00 AM	5:00 PM	Badge Pickup				
7:00 AM	8:00 AM	Breakfast				
8:00 AM	9:30 AM	Monday Morning General Sessions ITA's Leadership Alliance (ILA) Graduation Recognition - Stan Mork, ITA President Keynote: MATTER - Create More Value, Move Beyond The Competition And Become The Obvious Choice! - Peter Sheahan				
MONDAY WORKSHOPS		WORKSHOP 1	WORKSHOP 2		WORKSHOP 3	ITL CIO ACADEMY <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: FLIP - Proven Strategies for Turning Challenge into Opportunity and Change into Competitive Advantage Peter Sheahan
12:00 PM	1:15 PM	Luncheon				
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 Peter Sheahan
3:30 PM	5:00 PM	Insight Into The Mind Of Today's Buyer Customer Panel		The Future of CAS: Industry Perspectives From Leading Publishers And Practitioners	ILA SIG: TBD	ITL Tactical Roundtables ITL Strategic Roundtables
6:00 PM	9:00 PM	Dinner Party				

Tuesday, April 30

7:00 AM	8:00 AM	Breakfast				
TRACKS & SESSIONS	Consulting & Reselling (CR)		CLIENT ACCOUNTING AND ADVISORY SERVICES (CAS) TRACK	ITL SPECIAL INTEREST GROUPS (SIG)	Internal Tech Leaders Sessions	
	CR TRACK 1 & Combined	CR TRACK 2			ITL TACTICAL	ITL STRATEGIC
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 for 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
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
11:00 AM	12:15 PM	Delivering Products And Services Via Subscription	Harnessing the Competitive Power of Industry Specialization	The Seven Ts: Creating Pricing Options, Choices and Packages	Digital Transformation SIG: RPA Real World Experience	The Changing Face Of Staffing
12:15 PM	1:30 PM	Luncheon				
1:30 PM	3:00 PM	Publisher CR Round Tables: The Good, Bad, And Ugly Of Your Partnership With Publishers		CAS Roundtables	AP/APV Roundtables	ITL Tactical Roundtables ITL Strategic Roundtables
3:15 PM	3:30 PM	CR Wrap Up Session			ITL Wrap Up Session	
1:00 PM	5:00 PM	Strategic Leadership Association (SLA) Session (Note: Separate Registration required) <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)
8:00 AM	4:00 PM	Strategic Leadership Association (SLA) Session (Note: Separate Registration required) <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 – Achieve Traction, 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.

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: TBD

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

Innovative Approaches To Growing Your CAS Practice

Facilitators and/or Panelists - TBD

Session Description TBD

ILA

(Open to Everyone)

ITA Leadership Alliance Special Interest Group

Bret Romney, Ascend Strategies

Session Description TBD

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/Engineering**
- **Service Delivery, Metrics and Support**
- **Project Management** – *Kevin Fraase, Eide Bailly LLP, Fargo, ND*
- **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 and Panelists - TBD

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

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

Panelists - TBD

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

Pricing And Packaging Your CAS Services

Facilitators and/or Panelists - TBD

Session Description TBD

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: TBD

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 and/or Panelists - TBD

The Challenges of the Past Busy Season from an IT Standpoint

ITL – S

8:00 am – 12:15 pm (225 CPE Minutes)

CIO ITL Metrics Workshop

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

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

Group Discussion and Panelists - TBD

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?

Facilitator and Panelists – TBD

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

Moving From Compliance To Consulting

Facilitators and/or Panelists - TBD

Session Description TBD

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 – TBD

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 - 1

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

Facilitators:

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

Mark Moore – Crowe LLP, Oakbrook Terrace, IL

Panelists – TBD

“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 topics a variety of topics being finalized and will be shared shortly.

ITL – S

8:00 am – 12:15 pm (225 CPE Minutes)

CIO ITL Metrics Workshop -- Continued

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 – 11:00 am – 12:15 pm - (75 CPE Minutes)

CR-1

Delivering Products And Services Via Subscription

Facilitators and/or Panelists - TBD

Session Description TBD

CR-2

Harnessing The Competitive Power Of Industry Specialization

Facilitator:

Christi Whipple – Avalara, Irvine, CA

Panelists:

Dominic Pernai – Cornerstone Solutions, Chicago, IL

Tyler Church – Infor, San Diego, CA

More TBD

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

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

Facilitators and/or Panelists - TBD

Session Description TBD

DA

Digital Transformation SIG: RPA Real World Experience

Facilitators:

Kevin Fraase, Eide Bailly LLP, Fargo, ND

Danielle Gallo – CohnReznick, Roseland, NJ

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

Panelists:

Peter J. Scavuzzo – Marcum LLP, NY, NY

More TBD

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)

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

Facilitator: *Stan Mork – ITA President, Northfield, MN*

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?

AP/APV Roundtables

Facilitator(s) - TBD

Session Description TBD

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/Engineering**
- **Service Delivery, Metrics and Support**
- **Project Management** – *Kevin Fraase, Eide Bailly LLP, Fargo, ND*

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

ITL

Facilitator: *Stan Mork, ITA*

CR

Facilitator: *Lissa Johnsen, ITA*

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)

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.

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.