



Internal Tech Leaders Summer Meeting

July 21-23, 2019

The Westin Poinsett
Greenville, SC

Sunday, July 21

12:30 PM	4:00 PM	On Your Own Time - Topgolf and other Local Activities
5:00 PM	9:00 PM	Registration - Gold Ballroom Foyer / Poinsett Foyer
5:00 PM	9:00 PM	Opening Reception and Dinner Party - Gold Ballroom

Monday, July 22

		Strategic Track	Tactical Track & Combined
		Card Room	Poinsett Ballroom
7:00 AM	8:00 AM	Breakfast - Mezzanine	
8:00 AM	8:10 AM	Agenda Review and Welcome <i>Stan Mork, ITA President</i>	
8:10 AM	9:30 AM	Host Firm Welcome and Executive Presentation <i>Bob Jamison and Rick Davis, Elliott Davis</i>	
9:30 AM	10:00 AM	Break	
10:00 AM	11:30 AM	ITL Financial Metrics Review Session	Microsoft Teams: Ultimate Collaboration Tool Or Compliance Nightmare?
11:30 AM	12:30 PM	Lunch - Mezzanine	
12:30 PM	1:45 PM	ITL Application Metrics Review Session	Machine Learning As A Service
1:45 PM	2:00 PM	Break	
2:00 PM	3:15 PM	A Journey To The Secure Cloud <i>Eric Sanders, Shore Group</i>	
3:15 PM	3:30 PM	Break	
3:15 PM	4:45 PM	Strategic Roundtables	Tactical Roundtables
6:00 PM	8:30 PM	Monday Night Social Event at Barley's	

Tuesday, July 23

7:30 AM	8:30 AM	Breakfast - Mezzanine	
8:30 AM	10:00 AM	How Data Analytics Can Help Drive Business Decisions <i>Dan Rundle, Worthwhile</i>	
10:00 AM	10:30 AM	Break	
10:30 AM	12:00 PM	Wolters Kluwer/CCH Executive Roundtable <i>*Closed Session - CIO's only*</i>	Managing The Service Desk In The 21st Century - Change Management
12:00 PM	1:15 PM	Lunch - Mezzanine	
1:15 PM	2:45 PM	CRM In The CPA Firm	IT And The Forward Looking Enterprise. From What Now, To What's Next!
2:45 PM	3:00 PM	Break	
3:00 PM	4:30 PM	Strategic Roundtables	Tactical Roundtables
4:30 PM	4:45 PM	Closing Discussion and Adjourn <i>Stan Mork, ITA President and Shawn Slavin, Incoming ITA President</i>	
6:00 PM		Optional Meet Up For Members Staying Until Wednesday	



Monday, July 22

8:00 – 9:30am

Track – Combined CPE – 80 min.

Room: Poinsett Ballroom

Welcome and Agenda Review

Stan Mork – ITA President, Northfield, MN

Host Firm Welcome and Executive Presentation

Bob Jamison and Rick Davis – Elliott Davis, LLC, Greenville, SC

Rick Davis, Chief Executive Officer of Elliott Davis, will provide a brief overview and history of Elliott Davis, discuss the disruption of change in our industry, and provide his perspective on the increasing importance of corporate culture in a modern accounting workspace.

10:00 – 11:30am

Track – Strategic CPE – 90 min.

Room: Card Room

ITL Financial Metrics Review Session

Paul Blowers – Plante Moran, Southfield, MI

Aaron Gray – CLA, Phoenix, AZ

Over the past year, we have been working on revamping the financial metrics. All of our ITL members are completing the new financial metrics spreadsheet for the first time prior to this meeting. In this session, we'll examine the results of this year's financial metrics reporting, discuss areas that need to be better defined and/or improved and review how the information will be collected, assembled and reported into the future.

10:00 – 11:30am

Track – Strategic CPE – 90 min.

Room: Poinsett Ballroom

Microsoft Teams: Ultimate Collaboration Tool Or Compliance Nightmare?

Ariel Edmond - WithumSmith+Brown, Red Bank, NJ

Jeff French – Elliott Davis, LLC, Greenville, SC

Nathan Gaudé – Elliott David, LLC, Greenville, SC

Terran LaMonda - WithumSmith+Brown, Bethesda, MD

The focus of this presentation will be Elliott Davis' experience with deploying Microsoft Teams. At the end of this session, a participant will walk away with a better understanding of the benefits of the Teams application as well as some of the common pitfalls. In this session we will:

- Discuss the Teams deployment experience
- Review some common compliance issues and concerns
- Identify some commonly overlooked training requirements
- Compare different migration strategies
- Explore day to day administration tasks



12:30 – 1:45pm

Track – Strategic CPE – 75 min.

Room: Card Room

ITL Application Metrics Review Session

Stan Mork – ITA President, Northfield, MN

Bob Jamison – CIO, Elliott Davis, LLC, Greenville, SC

Over the past year, we have been working on revamping the application inventory/metrics. All of our ITL members are completing the new application metrics spreadsheet for the first time prior to this meeting. In this session, we'll examine the results of this year's application metrics reporting, discuss areas that need to be better defined and/or improved and review how the information will be collected, assembled and reported into the future.

12:30 – 1:45pm

Track – Tactical CPE – 75 min.

Room: Poinsett Ballroom

Machine Learning As A Service

Paul Simpson – Elliott Davis, LLC, Greenville, SC

Curtis Shelton – CBIZ, Inc., Cleveland, OH

This session will explore the various vendor-provided cloud-based predictive modeling services that exist on the market today. We'll explore the major players in the space, what services they provide, and outline some specific use cases that could apply in our accounting, tax, audit and advisory world. Be prepared to leave the session with a better understanding of machine learning as a whole, as well as ideas on how you could implement machine learning models quickly to solve complex business problems without the need for a large internal infrastructure within your firm.

2:00 – 3:15pm

Track – All CPE – 75 min.

Room: Poinsett Ballroom

A Journey To The Secure Cloud

Eric Sanders, ShoreGroup, NY, NY

Now that most of our organizations have moved to the cloud, there are many new challenges we are faced with. How does IT functions change? How will you set up security in the cloud and connecting to the cloud? How does your GRC change? How do you best monitor you cloud workload for security and compliance? How do you deal with business continuity and disaster recovery?

3:15 – 4:45pm

Track – Strategic CPE – 90 min.

Room: Card Room

Strategic Roundtables

Bob Jamison – Elliott Davis, LLC, Greenville, SC

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.



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3:15 – 4:45pm

Track – Strategic CPE – 90 min.

Room: Poinsett Ballroom

Tactical Roundtables

The ever-popular ITL Tactical Roundtables for this Summer 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!

Table Leaders:

Application Development – Patrick Powers, Crowe LLP, South Bend, IN

Infrastructure/Engineering

Service Delivery, Metrics and Support

Project Management – Kathleen Fluke, Crowe LLP, Indianapolis, IN

Security/Compliance - Jerry Kiedrowski, CLA, Middleton, WI

Tuesday, July 23

8:30 – 10:00am

Track – All CPE – 90 min.

Room: Poinsett Ballroom

How Data Analytics Can Help Drive Business Decisions

Dan Rundle, Chief Executive Officer, Worthwhile, Greenville, SC

Using data to make decisions is not new, getting past “Reports”, but uncovering what truly matters is where the value lies. The road in between is by no means a straight path, with pit stops that can derail end value. Looking through the filter of a firm focused on providing innovative solutions we will hear how digital technologies are shaping the future, and the role of data. Through an open and interactive session Dan will explore several use cases of how Worthwhile has helped organizations “Out-Innovate the Competition” and achieve measurable outcomes. After this session you will have deeper understanding of how software data analytics solutions are achieving business goals.

10:30am - Noon

Track – Strategic CPE – 90 min.

Room: Card Room

Wolters Kluwer/CCH Executive Roundtable

Closed Session – CIO’s Only

Jim McGinnis, EVP and General Manager, Wolters Kluwer Tax & Accounting, Riverwoods, IL

Brian Diffin, Chief Technology Officer, Wolters Kluwer, Wichita, KS

Brian Meyer, Chief Information Security Officer, Wolters Kluwer, Wichita, KS

In this session, our ITA CIOs will have the opportunity to hear from Wolters Kluwer’s executive IT team regarding how CCH is addressing business continuity, security and other important topics for all Wolters Kluwer’s users. This will be a great opportunity to hear from their IT technology and security leaders and have an interactive discussion about future plans.



10:30am - Noon

Track – Tactical CPE – 90 min.

Room: Poinsett Ballroom

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

Jerad Barclay – BDO USA, LLP, Grand Rapids, MI

Troy Cherry – BDO USA, LLP, Waxhaw, SC

Nathan Gaude – Elliott Davis, LLC, Greenville, SC

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

“Change 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 work in conjunction with processes aiming to optimize IT services. In this session we will focus on Change Management. In particular definition, goals, challenges and relationship to the Service Desk.

1:15 – 2:45pm

Track – Strategic CPE – 90 min.

Room: Card Room

CRM In The CPA Firm

Facilitator & Speaker:

Brad Place – LBMC, PC, Brentwood, TN

Panelists:

Curtis Shelton – CBIZ, Inc., Cleveland, OH

Firms have invested significant time and resources toward CRM solutions. But who’s really getting a return on that investment? What are firms doing today to drive engagement with CRM solutions and generate a significant return on that investment? In this panel, we’ll hear from multiple firms who recently implemented or expanded their CRM solutions to find out what’s worked and what these firms plan to do with their solution in the coming year.

1:15 – 2:45pm

Track – Tactical CPE – 90 min.

Room: Poinsett Ballroom

IT And The Forward Looking Enterprise. From What Now To What’s Next!

Chris Morrow – Warren Averett, Birmingham, AL

I once had a partner tell me, “I couldn’t begin to understand what you do, but I know you work hard and I really appreciate all your efforts.” I realized at that moment, that I while I had a good reputation, I didn’t necessarily have a good track record of delivery. In this session we will discuss how to gather meaningful and actionable requirements for projects, secure buy-in, allow for faster development, and discuss methodologies for delivering results on time.

3:00 – 4:30pm

Track – Strategic CPE – 90 min.

Room: Card Room

Strategic Roundtables

Bob Jamison – Elliott Davis, LLC, Greenville, SC

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4:30 – 4:45pm

Track – All

Room: Poinsett Ballroom

Closing Discussion and Adjourn

Stan Mork – ITA President, Northfield, MN



NASBA Registry Information

Credit Hours: Up to 14 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: Internal IT for large CPA Firms and Technology Product, Support and Service Updates/Discussions. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member firms 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.nasbaregistry.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 57605 , Telephone (480) 515-2003.