# ITL2017

**Summer Internal Tech Leaders Meeting**  
**July 16-18, 2017 | The Drake Hotel, Chicago**

## Sunday, July 16

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>8:00 AM - 5:00 PM</td>
<td>Preparing For The Next Generation Workplace On Your Own Time</td>
</tr>
<tr>
<td>5:00 PM - 9:00 PM</td>
<td>Registration - Club International</td>
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<tr>
<td>5:00 PM - 9:00 PM</td>
<td>Opening Reception and Dinner Party - Club International</td>
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</tbody>
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## Monday, July 17

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>2 TRACKS</td>
<td>STRATEGIC TRACK</td>
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<tr>
<td></td>
<td>Drake Room</td>
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<td></td>
<td>TACTICAL TRACK AND COMBINED</td>
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<td></td>
<td>Gold Coast Room</td>
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<tr>
<td>7:00 AM - 8:00 AM</td>
<td>Breakfast - Club International</td>
</tr>
<tr>
<td>8:00 AM - 8:10 AM</td>
<td>Agenda Review and Welcome</td>
</tr>
<tr>
<td>8:10 AM - 9:30 AM</td>
<td>Host Firm Welcome and Executive Presentation</td>
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<tr>
<td>9:30 AM - 10:00 AM</td>
<td>Break</td>
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<tr>
<td>10:00 AM - 11:00 AM</td>
<td>2017 ITL Financial and Operational Metrics - Observations From The Metrics Project Team</td>
</tr>
<tr>
<td>11:15 AM - 12:15 PM</td>
<td>Next Generation Metrics – A Presentation of an Alternative Tool for Future Metrics Gathering and Analysis</td>
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<tr>
<td>12:15 PM - 1:30 PM</td>
<td>Lunch - Club International</td>
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<tr>
<td>1:30 PM - 2:45 PM</td>
<td>Developing Your Firm’s Artificial Intelligence Strategy</td>
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<tr>
<td>2:45 PM - 3:00 PM</td>
<td>Break</td>
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<tr>
<td>3:00 PM - 4:45 PM</td>
<td>STRATEGIC ROUNDTABLES</td>
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<tr>
<td></td>
<td>Strategic Roundtables – Artificial Intelligence Brainstorming</td>
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<tr>
<td>6:00 PM - 9:30 PM</td>
<td>Off-Site Reception and Dinner Event - Chicago’s First Lady River and Lake Michigan Dinner Cruise</td>
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## Tuesday, July 18

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>7:00 AM - 8:00 AM</td>
<td>Breakfast - Club International</td>
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<tr>
<td>8:00 AM - 9:15 AM</td>
<td>Update From The AICPA Chair (Technology And The Next Generation Firm)</td>
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<tr>
<td>9:30 AM - 11:00 AM</td>
<td>The Power Of Diversity</td>
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<tr>
<td>11:15 AM - 12:30 PM</td>
<td>Immersive Planning and The Workplace Of The Future</td>
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<td>Leading In A VUCA World - Volatility, Uncertainty, Complexity, Ambiguity</td>
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<td>3:15 PM - 4:45 PM</td>
<td>STRATEGIC ROUNDTABLES</td>
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<td>A Discussion Of Future Workforce Models For Our Firms And Our IT Groups</td>
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<tr>
<td>4:45 PM - 5:00 PM</td>
<td>Closing Discussion and Adjourn</td>
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<tr>
<td>6:00 PM</td>
<td>Optional Meet Up For Members Staying Until Wednesday Morning</td>
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SUMMER MEETING THEME – PREPARING FOR THE NEXT GENERATION WORKFORCE
SESSIONS AND SPEAKERS

Monday, July 17

8:00 – 9:30am
Room: Gold Coast Room
**Host Firm Welcome and Executive Presentation**
Track: Combined
CPE – 80 min

*Jim Powers, CEO - Crowe Horwath LLP, Indianapolis, IN*
*Yvonne Scott, CIO - Crowe Horwath LLP, Oak Brook, IL*

Jim Powers, CEO of Crowe Horwath LLP, will share his view of where the accounting and consulting profession is heading and IS’ role in that future. Celebrating its 75th year, Crowe is redefining itself as an accounting, consulting and technology firm. Jim will discuss how the firm’s talent will combine with technology to transform, including the firm’s focus on innovation and mobility, to live the firm’s brand promise: Smart decisions. Lasting value.

10:00 – 11:00am
Room: Gold Coast Room
**ITL 2017 Financial and Operational Metrics**
Track: Combined
CPE – 60 min

*John Bowles – DHG, Charlotte, NC*

Our ITA member firms regularly report that the annual metrics gathering and reporting process is one of the key benefits being part of the ITL. During this session, our Metrics Committee will provide their comments and perspectives on what they found to be the most significant and interesting findings and discussions points as they compiled and review the 2016 results. This session is not intended to be a deep dive into all areas of metrics submission, but will allow for a general discussion of trends observed by the committee and clarification on any “outliers” that were observed as part of this year’s process.

11:15am – 12:15pm
Room: Drake Room
**Next Generation Metrics – A Presentation Of An Alternative Tool For Future Metrics Gathering And Analysis**
Track: Strategic
CPE – 60 min

*David Holyoak – Digital Sherpas, LLC, Naperville, IL*
*Doug Brady – LDH Consulting, Inc., Clarkston, MI*

Our current metrics collection and reporting process had been in place for over 15 years. We have made many improvements along the way and it has served us well. As we look to the future, is there any opportunity to improve the process, the metrics, the analysis and the output? Can we make the process more efficient? Are we benchmarking the right metrics? Is the analysis relevant? Can the output be easily shared with senior leadership and peers? In short what does the next generation of ITL metrics look like? In this session, we will explore and discuss all these questions as Doug Brady and David Holyoak (former CIOs and ITL members) walk us through an alternative metrics gathering and analysis process and how it can benefit our firms.
SUMMER MEETING THEME – PREPARING FOR THE NEXT GENERATION WORKFORCE
SESSIONS AND SPEAKERS

11:15am – 12:15pm
Room: Gold Coast Room
2017 ITL Applications and Service / Support Metrics
Track: Tactical
CPE – 60 min
   Victor Canipe – DHG, Hendersonville, NC
   Brad Powers – DHG, Hendersonville, NC
In this tactical breakout sessions, you will be given the opportunity to get into a deeper discussion about this years’ service desk and application metrics results. After a brief overview presentation by the members of the ITL Metrics Committee responsible for gathering this data, you will have the opportunity to break into tables by area of interest to further discuss with your peers how their metrics compared and contrasted to your firm’s and to identify best practices that firms may be implementing to improve their overall operational metrics.

1:30 – 2:45pm
Room: Gold Coast Room
Developing Your Firm’s Artificial Intelligence Strategy
Track: Combined
CPE – 75 min
   Dr. Kristian Hammond, Professor of Electrical Engineering and Computer Science - Northwestern University
   And Co-Founder and Chief Scientist - Narrative Science
   Evanston, IL
Whether you call it cognitive computing, machine learning or smart machines, it is clear that Artificial Intelligence is back and new types of intelligent systems are emerging. We are now living in a world in which we are surrounded by increasingly intelligent machines. So how do we deal with an environment is which we may no longer be the smartest kids in the room? And how do we integrate them into our work and business? In this talk, we will discuss the current landscape of cognitive computing and artificial intelligence with the goal to getting beyond the hype and fear and build an understanding of how these systems work and will affect our lives.

3:00 – 4:45pm
Room: Drake Room
Strategic Roundtables – Artificial Intelligence Brainstorming
Track: Strategic
CPE – 90 min
   Roundtable Leader: Russ Ahlers – BDO USA, LLP, Grand Rapids, MI
As we just heard in Kristian Hammond’s presentation on Artificial Intelligence, new types of intelligent systems are emerging. How are you preparing your firm for this disruption? During this session, let’s brainstorm on what a firm strategy might look like?

3:00 – 4:45pm
Room: Gold Coast Room
Tactical Roundtables – Next Generation Technologies Discussion Tables
Track: Tactical
CPE – 90 min
   Roundtable Leader: Elliott Whitmer - Crowe Horwath LLP, South Bend, IN
Following our discussion on Artificial Intelligence, we will hold our first round of tactical roundtables. For this session, we will have tables focused on specific next generation technologies/concepts that may impact our firm. Topic tables focused on AI Toolsets, Infrastructure/VDI, Security, and other areas will be facilitated by an ITL member.
Update From The AICPA Chair (Technology And The Next Generation Firm)

Track: Combined
CPE – 75 min
Kimberly Ellison-Taylor, CPA, CGMA
Global Accounting Strategy Director for the Financial and Professional Services Industries - Oracle America
And Current Chair, American Institute of CPAs
Annapolis Junction, MD

Kimberly Ellison-Taylor has a unique background that makes her a great fit for discussing future trends in accounting and technology for our ITL members. At Oracle, she helps drive innovation in the cloud solutions and enterprise technology domains, particularly as it relates to Cloud and SaaS technologies. Prior to Oracle, she held leadership roles at the NASA Goddard Space Flight Center, Motorola, KPMS and served as the Chief Information Officer at Prince George’s County Government. As the current Board Chair of the AICPA, she is focusing on two areas – the impact of technology on the accounting profession and preparing for the Next Generation CPA firm client. Kimberly will share her perspectives on how technology is changing the accounting industry for our clients and our firms and will discuss how she believes that CIOs in CPA firms can maximize their effectiveness as part of their Firm’s leadership teams.

The Power of Diversity

Track: Combined
CPE – 90 min
Sandee Kastrul, President and Co-Founder - i.c.stars, Chicago, IL

Sandee leads i.c.stars, an innovative non-profit leadership and technology program founding in 1998 to prepare inner-city adults for technology careers and community leadership. In this interactive session that will include both large and small group activities, we will define culture, begin to architect the meaning of safe spaces for change, and define the 101 of diversity and inclusion. This session invites leaders to examine their own filters, and ways of seeing the world, and accept the different ways that our talent shows up to contribute. As an outcome, we will have a working challenge for individuals, organizations and the industry.

Key learning objective of this session include
- Identify unique strengths of self and others
- Examine cultural biases, societal stereotypes, and discuss perceptions of self and others
- Examine how our biases affect how we interpret skill sets
- Develop a reflective awareness of ourselves and each other, creating a learning environment and ensemble of confident knowledge workers
- Highlight the power of diversity as a catalyst for innovation in our businesses.
SUMMER MEETING THEME – PREPARING FOR THE NEXT GENERATION WORKFORCE
SESSIONS AND SPEAKERS

11:15am – 12:30pm
Room: Drake Room

**Immersive Planning and The Workplace of The Future**
Track: Strategic
CPE – 75 min

*Kimberly Smith, Senior Director of Workplace Strategy - Knoll, Inc., New York, NY*

Knoll’s Workplace Research Group, led by Kimberly, has done extensive research on how office design impacts the working experience of our employees and teams. In a recent workpaper titled “Immersive Planning: From Research to Realization”, Knoll found five significant factors that contribute to a new way of working and drive new thinking about the work environment. Kimberly will share with us the findings from this study and will also discuss her insights on workplace design in professional services firms and how technology leaders need to be more involved in workplace planning to ensure that facility design includes provisions for incorporating current and future technologies.

11:15am – 12:30pm
Room: Gold Coast Room

**Building Out The Infrastructure Of The Future**
Track: Tactical
CPE – 75 min

*Moderator: Jeff French - Elliott Davis Decosimo, Greenville, SC*

*Presenters: Shon Boggs, Data Center Solution Architect – CDW, Chicago, IL*

*Matt Cross, Internal Solution Architect – CDW, Chicago, IL*

There are many abstract notions about what infrastructure looks like, but the truth may be closer than we think. Shifts in workplace design, user experience, hybrid cloud models, micro services architectures, collection of large amounts of data are just the beginning. As we prepare for the future, how do we prioritize and focus on the right things... Scaled Out Solutions, Cost, or Elasticity? As we plan, we must also balance security and regulatory requirements, a great deal to think about. This session discusses these topics and is sure to be interesting to all who attend.

1:30 – 3:00pm
Room: TBD

**Leading In A VUCA World - Volatility, Uncertainty, Complexity, Ambiguity**
Track: Combined
CPE – 90 min

*Liz Sant - Crowe Horwath LLP, Oak Brook, IL*

We’re living and leading in a VUCA world – one that’s Volatile, Uncertain, Complex, and Ambiguous. This world presents new challenges to leaders – and requires a different mindset to perceive and react to the pace and nature of change. In this interactive session, we’ll explore what it means to be a successful leader in a VUCA world and identify the habits that will help us meet the challenges that come with it.

3:15 – 4:45pm
Room: Drake Room

**Strategic Roundtables - A Discussion Of Future Workforce Models For Our Firms And Our IT Groups**
Track: Strategic
CPE – 90 min

*Roundtable Leader: Yvonne Scott - Crowe Horwath LLP, Oak Brook, IL*

Please join our closing roundtable session to continue our open-forum discussion. In this session, we will focus some of our discussion on future workforce models for our firms and our IT groups and will also provide time for an open discussion of other topics that we didn’t have time to cover during our other breakout sessions.
SUMMER MEETING THEME – PREPARING FOR THE NEXT GENERATION WORKFORCE
SESSIONS AND SPEAKERS

3:15 – 4:45pm
Room: Gold Coast Room
Tactical Roundtables - Functional Area Topic Tables
Track: Tactical
CPE – 90 min

Kevin Guyer - Cherry Bekaert LLP, Richmond, VA
Steve Rage - Eide Bailly LLP, Fargo, ND
Tom Walch - BDO USA, LLP, Grand Rapids, MI
Elliott Whitmer - Crowe Horwath LLP, South Bend, IN

Please join this open-forum discussion of any and all topics of interest to the group. For this roundtable session, we will use our “standard” table breakouts by functional area, including Application Development, Security, Infrastructure, Project Management and Service Desk/Support. Each table will be led by a discussion leader who will help facilitate a discussion of issues for each group. Please come with a couple of topics you would like to discuss with your peers.

4:45 – 5:00pm
Room: Gold Coast Room
Closing Discussion and Adjourn
Track: Combined

Stan Mork, ITA President

At this wrap up session, ITA President Stan Mork will ask for your feedback on the Summer meeting and will also solicit ideas for breakout session topics and speakers for the Fall Collaborative, scheduled for December 3-5, 2017 in Salt Lake City, Utah. This will also serve as an opportunity for you to volunteer to participate as part of the Fall Collaborative content planning committee who will begin their planning in August.
NASBA Registry Information

Credit Hours: Up to 15 or 15.5 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.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, 23940 N. 73rd Place, Scottsdale, AZ 85255-3425, Telephone (480) 515-2003.
CLUB INTERNATIONAL

DRAKE

GOLD COAST

TACTICAL & COMBINED SESSIONS

STRATEGIC SESSIONS

SUNDAY RECEPTION & MEALS

REGISTRATION

GUEST ROOM ELEVATORS

MARQUETTE

LOBBY LEVEL