



A SHORT HISTORY OF ITA

The Value of Shared Knowledge

The Information Technology Alliance (ITA), a not for profit collaborative organization for mid-market technology professionals, consultants, and vendors, traces its roots back for almost a half-century. Its role has changed a lot over that time as the currents of technology have shifted, from mainframe computers to PCs, and from networked systems to today's cloud-based solutions and mobile applications. Yet one thing has remained constant for the Association: Its ability to provide a very productive forum for members as they navigate the challenges of providing automated business solutions.

But ITA is more than a trade association—it's a community, and a support system, that has deepened professional bonds, provided mentoring and leadership development, and created lasting friendships for members along the way.

"It's all about the relationships, and through ITA you develop relationships with really good people," said Doug Brady, CIO of Plante & Moran. "There is just this atmosphere built of trust and respect."

The ACUTE Years

ITA grew out of an earlier organization called the Accountants Computer User Technical Exchange (ACUTE), founded in 1963 by Arnold Schneidman, a CPA who would later create one of the first successful computerized tax-preparation programs, Software 1040. ACUTE started out as a loose collective of four accounting firms trying to figure out how to make best use of powerful mainframe computers that were beginning to revolutionize business. Like others who would follow him, Schneidman was not only a technology innovator, but someone who cared deeply about collaboration and leadership training for members.

"There's such a personality to this organization, and it started back in ACUTE," said Mickey Scheffki, a partner at Clifton Gunderson and member of ACUTE and ITA for some three decades.

ACUTE grew into an ad hoc user forum for IBM and software manufacturer Prentice-Hall, both of which helped underwrite the organization for many years. The group's focus was primarily on automating the practice management and working tools of the CPA firm. Over the next decade and a half, membership increased to 600 accounting firms and the group's Indianapolis headquarters boasted a staff of 10.



Jim Metzler, now an executive with the American Institute of Certified Public Accountants (AICPA), was a partner with a local firm in Buffalo, N.Y., when he joined ACUTE in 1978.

“ACUTE had opened up this world of technology to us that was brand new at the time,” he said. “It really took all of us local guys and made us national thought leaders, without us really knowing that. We learned from each other’s mistakes, we made amazing friendships, and we were the startup of technology in the profession.”

Trouble brewed in the early 1980s, however, when the group’s executive director misused ACUTE funds, sparking an organizational crisis. Metzler stepped in and helped restore the group’s balance, first shutting down the Indianapolis office and then hiring a professional management association to shoulder some of the administrative duties.

“What I had to do was spend my full time for a year keeping the organization afloat,” he said. “My partners at my firm were very giving.”

Metzler said he got plenty back from the organization in return. “The reason I’m at the AICPA today is because one day I joined an organization called ACUTE,” he said.

By the mid-1980s, IBM’s and Prentice-Hall’s dominance in the accounting sphere had slipped with the rise of new technologies and vendors, making ACUTE members’ collective expertise even more valuable. Many of these new, smaller suppliers began to emerge less as vendors and more as partners in the process of furthering the organization’s expertise. While not official members of ACUTE, their presence would help change the group’s dynamic— setting the stage for the formation of ITA.

“From the early to mid-90s, there was a very real passing of the torch from the older CPA types, who might have an interest and belief in what technology could do for their firms, to practitioners with a truly technology-centric focus,” said Jeff Zalusky, senior manager for Deloitte & Touche LLP’s enterprise risk services. “Over time, this meant we needed to talk about professionals and professionalism in practices that were not necessarily going to be CPA owned and operated.”

As networked computers grew in prominence, ACUTE’s membership pivoted to a greater degree into firm client consulting opportunities. That shift had a downside, however, since many smaller CPA firms didn’t have the resources to master complex systems to the degree that successful project consulting then required. Many ACUTE firms simply wanted to do their own in-house technology, and didn’t want to take the next step to advising their clients on hardware and software. Membership slid to just 35 firms, and it was clear the organization needed a fresh approach—and possibly new blood.



The Founding of ITA (OITA)

Starting in early 1997, a small core of ACUTE leaders—Ron Eagle, Mickey Scheffki, Doug Brady, Jeff Zalusky and Richard Drath—began laying the groundwork for a new group that would be called the Information Technology Alliance. Unlike ACUTE, membership would not be limited to CPA firms and their consultants, but would include vendors and non-CPA resellers, too. In short, everyone involved in providing mid market technology solutions would be invited to the table.

“This was a key step—recognizing a new value proposition that leveled the playing field for consulting, publishing, service, internal technology, and other professionals with common objectives—one that represents a signal legacy from this period,” Zalusky said.

One early landmark for the new organization was the contracting of Jo Ann Benzer, the longtime association executive and retiring chief operating officer of the Illinois CPA Society. Jo Ann had deep experience at event planning and a track record in establishing new professional credentials. The core group formally launched ITA in the summer of 1997, with Benzer’s home in Scottsdale, AZ, serving as the association’s headquarters. ITA’s initial motto encapsulated its new mission: “Knowledge increases in value when shared.”

“People who don’t get that, don’t last very long in ITA,” said Benzer, the group’s executive director.

The group imposed some basic ground rules and drafted its membership Code Of Conduct: 1) no poaching other members’ clients or people, 2) share what you know, 3) be a professional in all that you do and 4) barring catastrophe, make sure you show up for conferences. It turned out to be an ideal arrangement for members.

“Life’s too short to go through and learn these lessons yourself,” Brady said. Without ITA colleagues on hand to help navigate technology problems, “it would have been painful and expensive,” he said.

“People share their secrets,” Scheffki added. “Someone might say, ‘Boy, I screwed up on this.’ They’re open and honest.”

In another early milestone event, Taylor Macdonald, now vice president of channel sales at Intacct, was one of the first non CPA resellers asked to join the group shortly after its founding and agreed to serve on its first board.

“I found it was a good way to meet people who were smarter than I was,” he joked.

Macdonald, who calls himself a “huge evangelist” for business transformation and practice development, got a new job with Sage shortly after joining ITA—which, coincidentally, was looking for a premier sponsor. He was able to help convince Sage to fill that role.

Still, there were many challenges in keeping the organization afloat in its infancy. As Scheffki said, “We were all volunteers with real day jobs trying to make this organization run,” Scheffki said. “It was a challenging time.”



Merger with AICPA

ITA had been considering the creation of a technology credential for its members, a concept that also intrigued a number of people at the American Institute of Certified Public Accountants (AICPA). Members in ITA had worked with people in the Institute for years on their Tech conferences and other projects, so discussions on how to work together quickly became serious.

“It was a vision most everyone bought into, and saw the need for,” Ron Eagle, president of the ITA, said of the credential idea. “But ITA was a small, volunteer-based organization. Getting a credential launched, and then established, on a national basis is a tough thing to do. The AICPA was a much better organization for that job.”

Benzer added: “We began talking to a variety of people at the Institute, who said we should come into the AICPA as an IT section already formed.”

The path was set and ITA was merged into the AICPA as a full-fledged technology section in the fall of 2000, and several ITA members joined with academics, influential firm technology leaders, and others to design and launch the Certified Information Technology Professional designation that same year. Initially, the CITP credential was meant to recognize the value of AICPA members (CPAs and non CPAs working for CPA firms), who possessed broad expertise and experience in the business of technology.

As successful as the CITP credential has turned out to be, the relationship with AICPA was short-lived. The 9/11 attacks in 2001 forced the cancellation of one conference. And in the wake of the Enron scandal, the AICPA needed to focus on core accounting issues and shed several side projects including the continuing integration of ITA. In January 2002, the section that had been ITA was officially sundered from the accounting group.

NITA: The New Information Technology Alliance

It was clear a need still existed for a group such as ITA, and someone needed to take the lead in resurrecting it. Ron Eagle, who had been a longtime member of ACUTE and a leader in the original ITA, was fortuitously leaving Centerprise Advisors at the time and ended up leading the re-launch of ITA.

“I had a passion to do it,” he said. “And I had the time on my hands.”

Brady said Eagle was the right man at the right time. “He clearly was the driving force behind the restart and did, I think, a fantastic job,” he said.



The new ITA kicked off with 50 or so “founder firms”, most from the OITA days, at the Peninsula Hotel in Chicago during the early summer of 2002. One big change from the old group: Membership now had to come through invitation. Eagle espoused what he called his “Whales and Minnows” strategy, seeking out the “A” players in the industry as the association’s core members and speakers.

“A” players were the whales of the profession, surrounded by the smaller firms and practices (the minnows) that wanted to learn from them and grow into whales themselves. “We felt an obligation to share what we knew and were doing” Eagle recalls.

And from the prospective vendor member’s perspective, the ITA value proposition was simple. “If you land a whale, you can feed the village for a year,” Eagle said.

With money tight, some early conferences and Board meetings were held at less glamorous locations, and amenities were kept to a minimum. “We didn’t eat nearly as well as we do now,” Macdonald said.

But the organization soon regained its momentum and reputation, for both professional development and fun. Members proudly adopt a “work hard, play hard” attitude toward conferences, which are now held in topnotch city and resort locations. Past activities have included a “Geek Bowl,” a Jeopardy-type game tied to technology trivia, black-tie and white (tennis) shoe dinners, and the famous 10th anniversary ITA Texas Hold-em Open.

“We have a good time,” Scheffki said, “and we get a lot done.”

And, Benzer said, “the educational content grew right along with the changing information needs of ITA’s growing and diverse membership. We started with 3 tracks of content and some 25 sessions, to 5 tracks and almost 50 sessions today!”

In 2005, the ITA created its separate internal technology leaders (ITL) section, composed of the IT chiefs and CIOs at the nation’s top 30 CPA firms. At the time, most of those leaders were attending other meeting forums and it was increasingly difficult to schedule time for multiple events. But Eagle, Brady, Dave Holyoak of Grant Thornton and Steve Noble of LarsonAllen were able to pledge to the prospective CPA firms that they would set their own agenda—and, in fact, have their own charter within ITA.

“The promise we made to people is they were in control of what they did and what they discussed,” Eagle said. “That really appealed to the CIOs.”

ITA has made a conscious decision to limit its overall membership to 200 firms or less, and to limit the ITL group to only the top 30 firms. It could easily expand the group of internal tech leaders, but that would make it less personal and relevant, according to Brady.

“It’s the people-to-people piece that makes ITA strong,” agreed Benzer. “We are a small organization by design – everyone knows everyone. That’s part of our secret sauce”



Challenges Ahead

Today, ITA is thriving, and its members continue to rely on it as a critical resource for plotting their course through technological change. And there are always new challenges to face!

Cloud-based solutions, for example, offer a whole new grab-bag of capabilities for firms, “but revenue streams are a completely different game for tech providers than under the old on-premise, licensed software model. We focus on stuff like that”, Eagle said. ITA also wants to reach out to its younger members through use of more social media in between conference times, but creating community and collaboration isn’t always automatic in the online world, even within the strongest of groups.

Still, ITA members know that, in the end, they will always have their face-to-face meetings, where members can network and rely on each other to work out solutions. And given all the changes and challenges involved with technology today, that willingness to share makes the organization more valuable than ever.

“You get as much out of it as you put into it,” Macdonald said.

“Community, collaboration, education, thought leadership, and fun – what more can you ask for?” posed Eagle.

Jeffrey May, Author - Courtesy of CPA2Biz