



July 20-22, 2025
Marriott Raleigh City Center
Raleigh, NC

INFORMATION TECHNOLOGY ALLIANCE

Internal Tech Leaders

SUMMER MEETING

Sunday, July 20

12:30 PM	4:00 PM	On Your Own Time - Local Activities
1:00 PM	4:00 PM	Optional Meet up Activity (Zinhouse or Local Brewery)
4:00 PM	9:00 PM	Badge Pickup - Registration Desk
5:00 PM	6:30 PM	Opening Cocktail Reception
6:30 PM	9:00 PM	Welcome Dinner Party

Monday, July 21

		STRATEGIC TRACK	TACTICAL TRACK
7:00 AM	8:00 AM	Breakfast	
8:00 AM	8:10 AM	Welcome and Agenda Review Geni Whitehouse, ITA President	
8:10 AM	9:30 AM	Host Firm Welcome And Executive Presentation Mike Giuli and CBH CEO	
9:30 AM	10:00 AM	Break	
10:00 AM	11:30 AM	AICPA - State of the Profession	
11:30 AM	12:30 PM	Lunch	
12:30 PM	1:45 PM	Knowing What You Know Now, What Do You Wish You Knew When You Started Your First CIO Job?	
1:45 PM	2:00 PM	Break	
2:00 PM	3:15 PM	Enterprise Architecture Tools and Roadmapping - LeanIX	Migrating Data Across Platforms After Acquisition + Reducing Technology Sprawl - Front End Contracting Considerations
3:15 PM	3:30 PM	Break	
3:30 PM	5:00 PM	ITL Strategic Roundtable (Metrics)	ITL Tactical Roundtable
6:00 PM	9:00 PM	Monday Night Party and Dinner	

Tuesday, July 22

		STRATEGIC TRACK	TACTICAL TRACK
7:30 AM	8:30 AM	Breakfast	
8:30 AM	10:00 AM	Mergers and Acquisitions - Large Firm Combos - Tech and Culture	Bots/Agents and Practical Productivity Tools
10:00 AM	10:30 AM	Break	
10:30 AM	12:00 PM	Client Experience, Marketing Automation, Customer Relationship Management, Salesforce, Dynamics, Other Platforms - Connecting Portals and CRM Tools	Process Automation - Evaluating Results, Roll Forward and AP Processes
12:00 PM	1:15 PM	Lunch	
1:15 PM	2:45 PM	Darwin Awards for Technology: Biggest Mistakes We Won't Repeat	
2:45 PM	3:00 PM	Break	
3:00 PM	4:15 PM	ITL Strategic Roundtable	ITL Tactical Roundtable
4:15 PM	4:45 PM	Closing Discussion And Adjournment Geni Whitehouse, ITA President and Mike Giuli, CBH Host Firm CIO	
6:00 PM	8:30 PM	Optional Meet Up For Members Staying Until Wednesday	