



2019 Conference Agenda

Table of Contents

Agenda	3
Tech Update – Today’s Biggest Trends, Solutions, and Opportunities	4
CPA Firm Technologies – Helping Your Practice Grow	5
Bringing Artificial Intelligence to Your Excel Workbooks	6
Everything Google – How to Utilize Tools, Services, and More	7
Blockchain and Emerging Technologies	8
PDF Tools for Productivity	9
Small Business Cloud Accounting Shootout	10
Personal Privacy.....	11
The Best of the Best – Office Productivity Boosters.....	12
Going Virtual – Technology to Support Remote Team Members	13
A Scary Ride Through the Dark Web	14
Excel Power Query – Ten Things You Need to Know.....	15
Personal Technologies, Including Home Technologies and Automation	16
Improving Communications with Effective Visualizations	17
Power BI – Advanced Reporting	18
Mid-Market Accounting, ERP, and Business Intelligence	19
Current Tech Crimes – Ripped from the Headlines.....	20
Bring Your Team Together.....	21
Excel’s Best New Features	22

Agenda

2019 Technology Conference Agenda

Day One

Start Time	End Time	Length (Min)	
8:30 AM	10:10 AM	100	Tech Update: Today's Biggest Trends, Solutions, and Opportunities
10:10 AM	10:20 AM	10	BREAK
10:20 AM	12:00 PM	100	CPA Firm Technologies: Helping Your Practice Grow
12:00 PM	1:00 PM	60	LUNCH
1:00 PM	2:40 PM	100	Bringing Artificial Intelligence to Your Excel Workbooks
2:40 PM	2:50 PM	10	BREAK
2:50 PM	4:30 PM	100	Everything Google: How to Utilize Tools, Services, and More
			Blockchain and Emerging Technologies
			PDF Tools for Productivity
			Small Business Cloud Accounting Shootout
			Personal Privacy

Day Two

8:30 AM	10:10 AM	100	The Best of the Best: Office Productivity Boosters
10:10 AM	10:20 AM	10	BREAK
10:20 AM	12:00 PM	100	Going Virtual: Technologies To Support Remote Team Members
12:00 PM	12:50 PM	50	LUNCH
12:50 PM	1:40 PM	50	A Scary Ride Through the Dark Web
1:40 PM	1:50 PM	10	BREAK
1:50 PM	2:40 PM	50	Excel Power Query - Ten Things You Need to Know
2:40 PM	2:50 PM	10	BREAK
2:50 PM	4:30 PM	100	Excel's Best New Features
			Personal Technologies including Home Technologies and Automation
			Improving Communications with Effective Visualizations
			Power BI - Advanced Reporting
			Mid-Market Accounting, ERP and Business Intelligence
			Current Tech Crimes: Ripped from the Headlines
			Bring Your Team Together

Tech Update – Today’s Biggest Trends, Solutions, and Opportunities

Technology continues to revolutionize how we work; those who ignore this fact do so at their own peril. To remain successful, business professionals must stay on top of technology trends, implement the best solutions, and seize opportunities as they appear.

In this session, you will learn about a wide variety of technology trends, solutions, and opportunities. Specifically, you will learn about spending trends, software licensing issues, leading-edge hardware, mobile and cloud strategies, and security risks. If you attend only one technology session this year, make sure it is this one so that you are well-positioned for what lies ahead!

Major Topics Covered

- Hardware and software trends that affect your strategy
- Purchase guidance on what to approve and avoid
- Innovative applications for productivity and security
- Interesting technology to consider

Learning Objectives

Upon completing this session, you should be able to:

- List major hardware and software trends and identify their importance as it relates to purchasing these assets
- Identify major updates, strategies, and opportunities emanating from leading software publishers
- Differentiate between the most significant security risks and implement practical solutions to mitigate these risks
- Assess the potential impact of implementing new generation hardware options
- Identify leading cloud options available today and the importance of facilitating mobile use in your organization

CPA Firm Technologies – Helping Your Practice Grow

Public accounting firms face a technology tsunami. Traditional tools such as practice management, tax, audit, document management, and workflow are as important as ever. However, new opportunities with tools based on artificial intelligence, machine learning, and process automation are available now to improve firm efficiency.

Join us in this session - designed specifically for public practice professionals - to gain real-world, practical perspectives on the opportunities available today. In addition, you will learn about specific actions you can take to capitalize on new tools and better techniques in all areas of practice, from tax to audit to client accounting services.

Major Topics Covered

- Software publisher updates
- New technologies for CPA firms to consider
- Opportunities in evolving areas of public practice

Learning Objectives

Upon completing this session, you should be able to:

- List the top five opportunities for public practice firms
- Create and implement effective implementation strategies
- Identify the importance of implementing key productivity tools such as workflow, document automation, and robotic process automation
- List five specific methods to improve the use of existing tools
- Create a comprehensive plan for improving client and team member experience in your firm.

Bringing Artificial Intelligence to Your Excel Workbooks

If you are an Office 365 subscriber, you should know that Microsoft is bringing artificial intelligence to your Excel workbooks. These leading-edge features include Ideas, new data types, the ability to insert data from a picture, and dynamic arrays. If you know how to use these tools, these AI-powered additions to Excel will save you time and improve accuracy. Take part in this session to learn how you can bring artificial intelligence to your Excel workbooks.

Major Topics Covered

- How to use Excel's Ideas feature
- Working with Excel's new data types
- How to use Dynamic Arrays

Learning Objectives

Upon completing this session, you should be able to:

- List the AI tools available in Excel
- Create formulas that work with Dynamic Arrays
- Utilize Ideas to find information in your data

Everything Google – How to Utilize Tools, Services, and More

Most users are familiar with Google's search service and Gmail but are unaware of the other services available. Additionally, most users just scratch the surface of the functionality of the Google tools and services they do use. In this session, you will learn about Google's most useful features, apps, and services, all of which accounting and financial professionals could use better. Further, you will learn how to find better web results, gain an understanding of G Suite and how you can use it as your organization's back office, and time-saving tips on how to use Google offerings more effectively and efficiently.

Major Topics Covered

- Google Search
- G Suite for desktop productivity
- Backup and file synchronization options
- Google's Cloud-based solutions

Learning Objectives

Upon completing this session, you should be able to:

- List the business-focused services and functionalities of G Suite by Google and value they can deliver to an organization
- Use Google Search operators to find better results using Google search or inside G Suite to find the exact email, calendar appointment, or message in their account
- Create documents, spreadsheets, presentations and more using the G Suite desktop productivity functionalities
- List the various Google mobile Apps and identify how a busy professional would use them on the go
- Demonstrate how to back up, share and sync files to the Cloud, other users and computers using Google Drive
- Implement Google's marketing and website tools to improve their organization's web presence and search appearance
- Utilize the various hidden functionalities of Google which are not widely known, but can greatly improve user's productivity

Blockchain and Emerging Technologies

Blockchain and other emerging technologies will affect every industry and profession. For example, some products have already implemented machine learning and artificial intelligence to help you be more effective. Further, process automation tools are now available for small and mid-sized businesses. In this “how-to” session, you will learn about emerging technologies that directly affect business professionals. While many emerging technologies are not yet ready for prime-time, some of them are. With the cookbook approach used in this session, you will see how tools available now can help you and your team be more productive, efficient, and effective.

Major Topics Covered

- Emerging technology trends that affect your strategy
- Purchase guidance on what to approve and avoid
- Innovative applications for productivity and efficiency
- Interesting technology to test and consider

Learning Objectives

Upon completing this session, you should be able to:

- List major emerging technology trends and identify their importance as it relates to accounting
- Illustrate how Robotic Process Automation is changing the landscape of traditional accounting and financial functions
- Identify major updates, strategies, and opportunities that include artificial intelligence and machine learning from leading software publishers
- Differentiate between the most useful emerging technology tools and implement practical solutions to take advantage of these opportunities
- Assess the potential impact of implementing an emerging technology strategy to improve financial and operational reporting
- Identify leading tools available today and the importance of facilitating the adoption of emerging technologies in your organization

PDF Tools for Productivity

Stop struggling with PDFs! Adobe Acrobat provides access to many features which make working with PDFs a breeze. Attend this session and learn how you can use these features for improved efficiency and data security. More specifically, you will learn about PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, and securing PDF documents. Importantly, mastering these tools will help you to work more effectively and efficiently with PDF documents. Join us in this very timely program where you will learn the top features necessary to optimize your PDF documents.

Major Topics Covered

- Learn the basics of creating, modifying, and organizing PDF documents
- Create stamps and use them as tick marks
- Secure PDF files against unauthorized access and modification

Learning Objectives

Upon completing this session, you should be able to:

- Build and use tick marks on documents
- Create and digitally sign a document using Acrobat
- Select text and create a bookmark
- Redact text from a PDF document
- Recognize text in a scanned PDF document

Small Business Cloud Accounting Shootout

Cloud-based accounting solutions are taking the market by storm. With so many choices available today, it can be difficult to know which one is best for you and your clients. Therefore, in this session, you will learn about the relative strengths, right fits, and target markets for many of the leading cloud-based solutions currently available, including QuickBooks Online, Sage Business Cloud Accounting, Xero, and Accounting Suite. You will also learn about some of the lesser-known but practical options such as Zoho and Wave Accounting. Don't miss this opportunity to expand your knowledge of the options available to small businesses.

Major Topics Covered

- Fundamentals of cloud accounting for small businesses and why these issues matter
- Five critical questions when considering a small business accounting solution
- Relative strengths and potential issues associated with leading cloud-based accounting solutions for small businesses

Learning Objectives

Upon completing this session, you should be able to:

- List three key capabilities/strengths associated with each solution discussed in this session
- Identify examples of small businesses that might be well-suited to use each of the solutions discussed in this session
- Create estimates of pricing for each solution presented

Personal Privacy

With much of our personal information collected and stored by others - sometimes without us even knowing about it - what can we do to help protect our privacy? Personal privacy is one of the biggest concerns of many individuals and organizations. Therefore, we should consider the implications of personal privacy at both levels. By taking part in this session, you will learn valuable techniques that can help you identify what elements of your personal information are at risk. Perhaps more importantly, you will learn what you can do to get back in control.

Major Topics Covered

- Discovering what companies such as Amazon and Google know about you
- How to "cleanse" your public profiles
- What to do if you believe your data is compromised

Learning Objectives

Upon completing this session, you should be able to:

- List examples of personal information that has already been exposed
- Identify how cybercriminals exploit personal information
- Create an action plan for getting in charge of your personal information

The Best of the Best – Office Productivity Boosters

Most professionals are familiar with using the Microsoft Office suite for day to day productivity. But how much more could you do to improve your productivity? Are you using Office's best tricks? Are there tools that you should add to your own bag of tricks?

In this session you will learn how to spot opportunities where you can achieve productivity gains with little effort. Moreover, you will learn how to use the tools you already own to boost your office productivity. By taking part in this session, you will learn office productivity boosters that can help you save two hours in just the first month after participating in this session.

Major Topics Covered

- Hardware and software tools that can support your strategy
- Application guidance to help you save time
- Innovative applications for productivity and collaboration
- Interesting productivity tools to consider

Learning Objectives

Upon completing this session, you should be able to:

- List major hardware and software tools and tricks that can improve your productivity
- Illustrate how using the tools you already have better will save you time
- Identify major updates, strategies, and opportunities emanating from leading software publishers
- Differentiate between the most significant work methods and implement practical solutions to help your productivity
- Assess the potential impact of implementing additional applications to improve productivity
- Identify leading collaboration tools available today and the importance of facilitating collaboration in your organization

Going Virtual – Technology to Support Remote Team Members

“Going virtual” has evolved beyond anywhere, anytime, any device access to full-service remote support. There are a wide variety of tools that help us work virtually. In this session you will learn about many of them, including multi-factor authentication, hosting, VOIP telephony, video conferencing, document management systems, portals, Microsoft Bookings/Teams/TimeTrade, and employee portals.

The goal, of course, is to have all team members effectively work wherever they are with a full complement of tools. Attend this session to learn the best ways to make these technologies work and how your business can execute a virtual employee strategy.

Major Topics Covered

- Remote hardware and software trends that affect your ability to work anywhere anytime
- Purchase guidance on what to expect, approve, and avoid
- Key applications for productivity and security
- Interesting technology to consider for remote work

Learning Objectives

Upon completing this session, you should be able to:

- List major hardware and software trends and identify their importance as it relates to working remotely
- Illustrate how remote integrations are changing the landscape of the workplace
- Identify major updates, strategies, and opportunities emanating from leading providers of technology
- Differentiate between the remote security risks and implement practical solutions to mitigate these risks
- Assess the potential impact of implementing a virtual work environment to improve productivity
- Identify leading remote tools available today and the importance of facilitating remote work in your organization

A Scary Ride Through the Dark Web

You have heard of the Dark Web, but have you experienced it? If not, buckle in for a scary ride through the underbelly of the Internet. Here many illicit and illegal activities occur every day, potentially affecting our personal and organizational security. In this session, you will experience first-hand the Dark Web and all that it entails - both positive and negative. Upon completing this session, you will understand why it is important to secure your information so that you do not become yet another victim of the Dark Web.

Major Topics Covered

- The origin of the Dark Web and the Deep Web and their relationship to the "ordinary" Internet
- How to connect to and browse the Dark Web
- Security risks associated with accessing the Dark Web
- Potentially useful sites and applications on the Dark Web

Learning Objectives

Upon completing this session, you should be able to:

- Differentiate the Dark Web from the ordinary Internet and from the "Deep Web"
- Identify the steps necessary to securely connect to and navigate the Dark Web
- List examples of useful sites and uses of the Dark Web
- Provide illustrations of how the Dark Web is used to facilitate potentially illegal activities, including those such as selling hacked data and identity theft

Excel Power Query – Ten Things You Need to Know

Microsoft has updated Excel's Power Query tool – first released in 2010 – with many new features. Power Query now provides users with the ability to access, link, and clean data to prepare it for reporting. In this session you will learn ten things every Power Query user should know to make it easier for you to create powerful reports in less time from any data source. Participate in this session to learn how you can put Power Query to work for you.

Major Topics Covered

- What is Power Query
- Importing data from various sources, including text, Excel, web sites, and databases
- How to clean-up imported data

Learning Objectives

Upon completing this session, you should be able to:

- List Excel versions that include Power Query
- Create Power queries to Pivot and Unpivot data
- Create Power queries to split data columns and combine data columns
- Create Power queries to group data by fiscal quarters and years

Personal Technologies, Including Home Technologies and Automation

No doubt, personal technologies are now mainstream. But can we automate our homes – and businesses– for convenience and security? What about connecting smart speakers like Amazon Alexa or Google Home units into our lighting systems or our surround sound TV systems? Can we automate these and other tasks to provide even more convenience, security, and privacy?

In this session, you will learn the options available to tie various systems together. For more sophisticated needs, you will learn the fundamentals of using integration tools like “If This, Then That (IFTTT)” to handle the task. Tune up your world at home and office with a little bit of effort.

Major Topics Covered

- Hardware and software trends for personal use
- Purchase guidance on what to buy and what to avoid
- Innovative tools for convenience and security
- Interesting technology to consider for integration into your home

Learning Objectives

Upon completing this session, you should be able to:

- List major hardware and software trends and identify their importance as it relates to home and small business use
- Illustrate how streaming feeds, security cameras and similar integrations are changing the landscape of traditional home automation
- Identify major updates, strategies, and opportunities emanating from leading home automation providers
- Differentiate between the most significant security risks and implement practical solutions to mitigate these risks
- Assess the potential impact of implementing a security application to improve home safety
- Identify leading integration tools available today and the importance of integrating home systems

Improving Communications with Effective Visualizations

Charts and graphs are nothing new. However, many professionals struggle with building effective visualizations. If that statement describes you, take part in this session to improve your skills when building visualizations. As a result of doing so, you will be able to create visualizations that will enhance your communication skills. This is much more than just a session on fundamental charts. Instead, in this session you will learn how to create advanced charts that are interactive, dynamic, and animated. If you are looking to improve your communication skills, this session is a must for you.

Major Topics Covered

- Understanding the importance of visualizations in Microsoft Office and other applications
- Best practices associated with creating charts, graphs, and other visualizations
- How to add interactivity and animations to your charts and graphs
- Common mistakes to avoid when building visualizations

Learning Objectives

Upon completing this session, you should be able to:

- Identify the types of visualizations that should be used to communicate specific messages
- Build effective visualizations in Office applications
- Create interactive visualizations
- Utilize Sparklines and Conditional Formatting to enhance visualizations in Excel

Power BI – Advanced Reporting

In this session, you will learn how to go beyond importing data into Power BI and creating simple reports. Instead, you will learn how to take advantage of some of Power BI's advanced features, including managing data relationships, creating KPIs, adding goal-oriented graphics, filtering with Slicers, and using new AI features in Power BI. Further, you will learn how you can use Power BI Desktop, Power BI Mobile, and Power BI Pro in concert to create a comprehensive reporting strategy.

Major Topics Covered

- Data relationships
- KPI graphics
- Adding measures and calculations
- Third party visualizations

Learning Objectives

Upon completing this session, you should be able to:

- List two ways of connecting tables
- Create and display revenue per foot KPI
- Identify the steps for adding a static value into the Power BI data model

Mid-Market Accounting, ERP, and Business Intelligence

Is your accounting platform performing as expected? If not, it may be time to consider the alternatives available with new generation, comprehensive accounting solutions. Sophisticated features formerly only available in Tier 1 ERP solutions have moved down market into the mid-market. Further, add-ons like business intelligence, financial reporting, budgeting, accounts payable automation, and sales tax compliance are easy to integrate to create a complete solution. If you have outgrown your existing system, have a proprietary system in place, or have a system that is ten years old or greater, it is time for you to review your options.

Major Topics Covered

- Accounting software trends that affect your strategy
- Methodologies to select the right platform
- Innovative applications for productivity and workflow
- Interesting BI tools to consider

Learning Objectives

Upon completing this session, you should be able to:

- List five mid-market accounting solutions
- Identify the advantages of using integrated workflow
- Create analytical reporting to facilitate more useful operational reports
- Utilize features such as bank feeds as well as AP and sales tax automation
- Build budgets more quickly and easily using appropriate tools
- Extend the functionality of your accounting solution with business intelligence tools

Current Tech Crimes – Ripped from the Headlines

Security is a top concern for CPAs every year. Yet many hacks result from organizations not implementing effective internal controls over information technology. In this session, you will learn about critical IT-related controls using a case study approach. More specifically, you will learn from real-world examples of breaches and security failures. Accordingly, you will understand better how to protect your company and its data. Attend this fast-paced session and learn more about IT-related controls you can use to prevent computer crimes such as identity and information theft, tax refund fraud, and more.

Major Topics Covered

- Data breach and computer security tips
- Security awareness training
- Learn more about current events and improve your security knowledge at the same time

Learning Objectives

Upon completing this session, you should be able to:

- List at least three major security incidents reported in the headlines in the last two years, and explain at least one major control design or operation flaws which allowed the hack to occur
- Define the three factors used to authenticate someone to a system and explain why two-factor authentication is preferable to one-factor authentication
- Explain why home-grade computer hardware and applications are inherently less secure than business and enterprise grade hardware and applications
- List at least three best practices learned as a result of reviewing the incidents cited in the case studies

Bring Your Team Together

Microsoft Teams is one of the best additions to the Microsoft stack in years. In this session, you will learn how you can use Microsoft's Teams application to organize workflows, communications, and document sharing for your workgroup, department, or organization. No matter the size of your team, having all your team's information in one place with complete integration into your Office applications can dramatically improve teamwork and performance. Participate in this session to get up and running with Microsoft Teams.

Major Topics Covered

- Setting up a free Teams account
- Using teams for all your communications
- Using Teams to keep work on track
- File collaboration and syncing

Learning Objectives

Upon completing this session, you should be able to:

- Create teams and channels for your office
- List the communication tools within Teams
- Identify ways to seamlessly work on files together as a team
- Utilize Microsoft Teams on your mobile devices

Excel's Best New Features

With the release of Excel 2019 and updates in Excel provided through Office 365 subscriptions, Microsoft continues to pack new features into the popular spreadsheet tool. Enhancements to Power Query, new functions, and improved collaboration opportunities are all available in newer versions of Excel. For those who know about these new features and how to apply them, exciting opportunities for improved productivity await. Take advantage of this opportunity to learn how you can put Excel's best new features to work right away!

Major Topics Covered

- New functions available in Excel such as IFS, SWITCH, and FORECAST.ETS
- Creating Data Models and the importance of doing so
- Enhanced collaboration tools in Excel
- How to take advantage of Power Query

Learning Objectives

Upon completing this session, you should be able to:

- List major new features added to recent releases of Excel
- Apply new functions and features to improve productivity when working with Excel
- Use Excel to collaborate in real-time with other users
- Link data from external data sources into Excel using Power Query