



K2's 2020 Technology Conference

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Agenda

2020 Technology Conference Agenda			
Day One			
Length (Minutes)			
100	Tech Update - A 2020 Vision		
10	BREAK		
100	Transforming Your CPA Firm	Mastering Advanced Excel Functions and Formulas	Integrating and Sharing Data
60	LUNCH		
100	Envisioning Your Midmarket Accounting Solution	Technoethics	Improving Productivity with Office 365 Cloud Applications
10	BREAK		
100	Current Tech Crimes - Ripped from the Headlines		
Day Two			
100	The Very Real Risk of Ransomware		
10	BREAK		
100	Profiting from Client Advisory Services	Advanced Topics in Power BI	Understanding Workflow and Automation Essentials
50	LUNCH		
50	Choosing Small Business Accounting Solutions	The Perfect Storm - Data Governance and Data Privacy Regulations	Emerging Technologies - 2020 and Beyond
10	BREAK		
50	Enhancing Small Business Accounting with Add-ons	The How's and Why's of Creating User Defined Functions in Excel	Implementing Security and Privacy Policies
10	BREAK		
100	Next Generation Excel Reporting		

Tech Update – A 2020 Vision

Description

You know where technology has been, but where is it headed? What technologies are coming that would be useful to you and to your company? You've heard about 5G, WiFi6, and collaboration, but what products work to make this practical? This session has the breadth, depth, and recommendations to help you understand what is in the market and what is working so that you can make informed decisions. Attend this session to learn how using the right hardware and software can improve your business and your everyday life.

Major Subjects Covered

- Hardware trends
- Software innovations
- Communication and collaboration tools
- Unusual technologies you might have missed
- Key products to consider for implementation

Learning Objectives

Upon completing this session, you should be able to:

- Select current technologies from a list
- List current communications choices
- Differentiate between key products and able competitors
- Create a tactical technology plan

Recommended CPE Credit

2 hours Computer Software and Applications

Transforming Your CPA Firm

Description

CPA firms are going through significant regulatory and technology changes. Do you want your firm to be transformed or to lag? What is the impact of the cloud, niche verticalization, software upgrades, and client demands on your team and the partners' profitability? Are you ready to navigate the new generation software? This session will provide separate road maps outlining small and larger firm choices in technology. Attend this session to get an independent overview of the state of technology in the profession.

Major Subjects Covered

- CPA firm centric hardware
- Software changes
- Technology options for your firm
- Specific technologies to improve productivity and profitability
- Strategic products to consider for implementation

Learning Objectives

Upon completing this session, you should be able to:

- Select new technologies for your firm from a road map
- List top niche markets
- Differentiate between products that are ready to implement and those that need time
- Create a transformative plan for your firm

Recommended CPE Credit

2 hours Computer Software and Applications

Mastering Advanced Excel Functions and Formulas

Description

Excel now has approximately 500 functions, many of which are unused by most accounting and finance professionals. This two-hour session will put you on the path to improved Excel productivity by introducing you to powerful and timesaving, but little used, Excel functions. If you want to improve your knowledge and efficiency with Excel, this session is a must for you.

Major Subjects Covered

- Using financial functions to calculate loan payments, depreciation, and cash flows
- Retrieve summarized data with the GETPIVOTDATA and CUBEVALUE functions
- Making sophisticated calculations with array formulas

Learning Objectives

Upon completing this session, you should be able to:

- List the three Excel functions for computing payments, payment interest, and principal write down
- Differentiate between the GETPIVOTDATA and CUBEVALUE functions
- Recognize similarities in using the SUBTOTAL and AGGREGATE functions
- Identify the steps necessary to create array formulas using ordinary Excel functions

Recommended CPE Credit

2 hours Computer Software and Applications

Integrating and Sharing Data

Description

The number of apps, services, platforms, etc. that we use increases every year. The amount of data we collect and process is expanding at an exponential rate. There is a need to standardize, streamline, and optimize our ability to manage the ever-growing list of systems and their data. Conquering your data can help improve efficiency, effectiveness, reduce cost and errors inside an organization. In this course, you will learn various ways of sharing data easily between different applications, platforms, and services. Further, you will learn about various tools, desktop application functionalities, and programming tools to manage this process.

Major Subjects Covered

- Data Sharing and Management
- Databases and Relational Data
- Power Query and Power BI
- Zapier, IFTTT and More

Learning Objectives

Upon completing this session, you should be able to:

- Define and identify where their organization keeps its data and how to access that data
- List various tools, services, and programs which can be used to manage data and share it with other systems
- Identify the cost and benefits of various data sharing techniques and approaches to an organization
- Construct and build data sharing and integration processes using widely available tools such as PowerQuery, Power BI, and more

Recommended CPE Credit

2 hours Computer Software and Applications

Envisioning Your Mid-Market Accounting Solution

Description

Businesses are being transformed by upgrading their accounting solutions. In this new world of Software as a Service, workflow-enabled, data-centric, and connected solutions, business problems can be solved in new ways. This session covers integrated and ERP solutions that should work for businesses that are in the \$10 Million to \$1 Billion range. If your system has been in place for seven or more years, it is time to consider an upgrade or replacement system. Leverage the instructor's knowledge of the market to minimize your risk.

Major Subjects Covered

- Overview of mid-market solutions
- Probable third-party solutions required
- Accounting solutions for specific industries
- Specific strategies to use on selecting a system
- Guidance on preparatory steps and conversions

Learning Objectives

Upon completing this session, you should be able to:

- List the top five products in the mid-market
- Identify common third-party solutions needed
- Differentiate between a nice-to-have upgrade and a true business need
- Create an implementation plan for your business

Recommended CPE Credit

2 hours Computer Software and Applications

Technoethics

Description

From the dawn of the Digital Age, ethical issues – with no easy solutions – have existed. These include questions relating to privacy, workers’ rights, and intellectual property. And, as technology advances, more issues are sure to arise. In this session, you will learn about the emerging field of technoethics and what you can do to promote ethical behavior in your organization, particularly as it relates to technology. You will also learn about some of the more notable technoethics lapses that have occurred, the fallout resulting from them, and how they could have been prevented.

Major Subjects Covered

- Differentiating between laws, morals, and ethics
- Examining key provisions of accountants’ Code of Ethics
- Reviewing notable technoethics issues and cases
- Creating a culture that advances ethics

Learning Objectives

Upon completing this session, you should be able to:

- Distinguish between ethics, morals, and legal obligations
- Identify examples of potential ethical conflicts arising from the use of technology
- List specific policies and procedures that should be in place to address issues surrounding technoethics

Recommended CPE Credit

2 hours Behavioral Ethics

Improving Productivity with Office 365 Cloud Applications

Description

Many Office 365 subscriptions include powerful cloud services for improving productivity. Foundational services, such as SharePoint, OneDrive, and Outlook, are joined by other powerful tools such as Teams, Planner, Power Automation, Forms, and Power Apps to provide a productivity platform second to none. Don't miss this opportunity to get all the knowledge and guidance necessary to take full advantage of your investment in Microsoft Office 365.

Major Subjects Covered

- Understanding the Office 365 cloud interface
- Cloud storage with SharePoint and OneDrive
- Full review of apps and services to improve productivity

Learning Objectives

Upon completing this session, you should be able to:

- Identify key components of the Office 365 portal
- Differentiate between OneDrive, OneDrive for Business, and SharePoint Online
- Use Team sites for shared documents, calendar, and task lists
- Determine where Power Automate or Planner would be useful to improve productivity

Recommended CPE Credit

2 hours Computer Software and Applications

Current Tech Crimes – Ripped from the Headlines

Description

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 with stories which are all new for 2020. 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 Subjects 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

Recommended CPE Credit

2 hours Information Technology

The Very Real Risk of Ransomware

Description

Over the past two years, ransomware has surged as a major threat to individuals and organizations of all sizes. To illustrate the threat ransomware is, its' annual cost to businesses is now estimated at over \$8 billion, up from \$1 billion in 2016. Against that backdrop, ask yourself "am I at risk?" Of course, the likely answer is "yes". To reduce this risk, you should participate in this session where you will learn how you can avoid becoming yet another victim of ransomware. The survival of your business may depend on it!

Major Subjects Covered

- Understanding what ransomware is and how it is transmitted
- Exploring a variety of high-profile ransomware cases
- Developing an action plan to reduce your individual and organizational risk

Learning Objectives

Upon completing this session, you should be able to:

- Define "ransomware" and identify how ransomware is disruptive
- List the major ways ransomware is transmitted
- Identify key controls you should implement to reduce your ransomware risk

Recommended CPE Credit

2 hours Information Technology

Profiting from Client Advisory Services

Description

Client Advisory Services (CAS) can be a profitable addition to your practice. How do you develop an effective, profitable offering? What are the considerations for service creation, controlling scope creep, people management, product selection, and scalability? What services should be offered? While many vendors have CAS programs they want you to adopt, when you attend this session you will receive an independent blend of profitable strategies and straightforward advice.

Major Subjects Covered

- Service offerings to consider
- Software options for a CAS practice
- Procedures to consider for your firm
- Specific techniques to improve productivity and profitability
- Key errors to avoid

Learning Objectives

Upon completing this session, you should be able to:

- Select CAS technologies for your firm from proven options
- List service offerings
- Differentiate between levels of service
- Create a profitable CAS plan for your firm

Recommended CPE Credit

2 hours Computer Software and Applications

Advanced Topics in Power BI

Description

So, you've been using Power BI to create fundamental reports and dashboards and now you're ready for even more advanced reporting...if so, this session is for you. In this session, you will learn how to extend your Power BI environment by incorporating tools such as Data Analysis Expressions, Key Performance Indicators, Hierarchies, and Apps and Content Packs, among others. By taking advantage of the tools and techniques covered in this session, you will be able to move beyond simple reports and dashboards in Power BI and truly leverage the power of this awesome reporting tool.

Major Subjects Covered

- Creating formulas in Power BI with Data Analysis Expressions
- Adding Key Performance Indicators to your Power BI reports and dashboards
- Managing security in Power BI
- Publishing your reports and dashboards to Apps and Content Packs for easy sharing with other team members

Learning Objectives

Upon completing this session, you should be able to:

- List the steps necessary to create formulas using Data Analysis Expressions
- Identify the importance of Key Performance Indicators
- Apply appropriate security techniques to your Power BI reports and dashboards
- Identify the purpose of Apps and Content Packs in the context of Power BI

Recommended CPE Credit

2 hours Accounting

Understanding Workflow and Automation Essentials

Description

Proper workflow optimizes a business for profitability. Once your workflow is optimized you can automate it with a variety of software tools. In this session, you will learn how to setup workflow processes properly. You will also learn about a variety of tools that you can use to achieve automated workflow. We'll review Zoho Flow, Power Automate, XCM, Automation Anywhere, as well as other robotic process automation (RPA) tools. This session will provide a road map on workflow technologies and choices you can implement now.

Major Subjects Covered

- Process documentation
- Software options
- Practical tools you can use today and may even own now
- Tips on optimizing workflow
- Demonstration of workflow concepts

Learning Objectives

Upon completing this session, you should be able to:

- Identify leading workflow technologies
- List workflow documentation tools
- Differentiate products working today and workflow technology that is not practical
- Create a workflow process improvement plan

Recommended CPE Credit

2 hours Computer Software and Applications

Choosing Small Business Accounting Solutions

Description

Small businesses have new and traditional choices in accounting solutions. In addition to traditional solutions like QuickBooks and Sage 50, there are Software as a Service options such as Gravity Software, Zoho Books, QuickBooks Online, Xero, Accounting Suite, Accounting Power and many more. This session covers accounting solutions that should work for businesses that are startups up to \$10 million in size. Attend this session so you'll know the best options for accounting in small business.

Major Subjects Covered

- Overview of small business accounting solutions
- Traditional desktop and SaaS small business products
- Shortfalls of specific accounting solutions
- Strengths and weaknesses of various solutions
- Setup and configuration tips

Learning Objectives

Upon completing this session, you should be able to:

- List the top five products in the small business market
- Identify shortfalls in common small business solutions
- Differentiate between products based on strengths and weaknesses
- Create a small business software strategy for your business

Recommended CPE Credit

2 hours Computer Software and Applications

The Perfect Storm – Data Governance and Data Privacy Regulations

Description

How do you control the data you are responsible for? Consider the impact of the May 2018 General Data Protection Regulation (GDPR), as well as the December 11, 2019 introduction of a law in India giving authorities sweeping access to data and the most important piece of U.S. legislation, the California Consumer Privacy Act (CCPA) which is in force as of January 1, 2020. Companies like Microsoft and Apple not only claim they are ready, but plan to implement CCPA across the country. What about your business? Have you completed your implementation? Attend this session to learn practical steps you can take to be compliant with mandated regulations.

Major Subjects Covered

- Data transparency and access
- Data deletion and portability
- Definition of personal information
- User opt out and the right to be forgotten
- Understanding the fines and risks

Learning Objectives

Upon completing this session, you should be able to:

- List the current fines for CCPA and GDPR
- Identify data governance risks
- Differentiate between privacy and governance
- Create a governance strategy to remain compliant with regulations for your business

Recommended CPE Credit

2 hours Computer Software and Applications

Emerging Technologies – 2020 and Beyond

Description

Emerging technologies changing so fast, it is hard to predict the future. Quantum supremacy may be driven by the Dowling-Neven Law of double exponential growth. We are seeing this in quantum computing, artificial intelligence, machine learning and robotic process automation. How can you keep from being blind-sided by a technology like blockchain or predictive analytics? This session will provide a road map on emerging technologies and choices you can implement now.

Major Subjects Covered

- Hardware enablement
- Software evolution
- Practical tools you can use today
- Unusual emerging technologies to watch in the future
- Emerging technologies that are not ready for prime time

Learning Objectives

Upon completing this session, you should be able to:

- Identify leading emerging technologies from a list
- List business applications of emerging technologies
- Differentiate products working today and emerging technology that doesn't quite work
- Create a plan to incorporate emerging technology appropriately in your business

Recommended CPE Credit

2 hours Computer Software and Applications

Enhancing Small Business Accounting with Add-Ons

Description

A complete accounting software solution almost always includes additional add-on products. For example, it is hard to accurately calculate sales tax, do budgeting, or have adequate reporting without third party add-ons. This session will provide guidance on some of the best add-ons in the market. If you have needs that are not met with your current solution, you may not need to change your base solution. You may just need the right add-on! Attend this session to discover the best of best extensions for accounting software.

Major Subjects Covered

- Overview of third part add-on solutions
- Review add-ons for both traditional desktop and SaaS small business products
- Shortfalls of specific add-on solutions
- Strengths and weaknesses of various solutions
- Broad range of needs covered

Learning Objectives

Upon completing this session, you should be able to:

- List the three common needs for add-on products in the small business market
- Identify shortfalls in common add-on solutions
- Differentiate between products based on business needs
- Create an add-on strategy for your business

Recommended CPE Credit

2 hours Computer Software and Applications

The How's and Why's of Creating User-Defined Functions in Excel

Description

With approximately 500 functions already present, Excel seemingly has a function for every need. But sometimes the function YOU need just simply isn't available. For example, Excel does not have functions to calculate income tax expense or, in many cases, depreciation expense. To solve these shortcomings, you can create User Defined Functions (UDFs). UDFs provide you with the opportunity to create functions for use in any of your formulas and automate your most complex calculations. Join us to learn how to put the power of UDFs to work to simplify and automate even your most complex calculations.

Major Subjects Covered

- Examining UDFs relative to macros
- Identifying the steps necessary to creating UDFs in Excel
- Understanding where you should save UDFs
- Key syntax when creating UDFs
- Incorporating UDFs into your workbooks

Learning Objectives

Upon completing this session, you should be able to:

- Define the role of a User Defined Function in Excel
- List the steps necessary to create and save a UDF
- Differentiate between key phrases used in creating UDFs
- Create formulas that incorporate UDFs

Recommended CPE Credit

1 hour Computer Software and Applications

Implementing Security and Privacy Policies

Description

How do you communicate the security needed in your organization to your IT team? When was the last time you updated your security policies? Are you compliant with the current regulatory environment, and is your business using best practices that reflect the threats of today? Attend this session to receive a suggested security strategy and checklist, as well as sample documents to use as models to update your own policies.

Major Subjects Covered

- Data security check list
- Minimum security protections
- Examples of policies that comply with regulations
- Suggested implementation strategy
- Security guidance that you can provide to others

Learning Objectives

Upon completing this session, you should be able to:

- List minimum security protection strategies
- Identify policies and security checklists that apply to your business
- Differentiate between minimum and good security and privacy policies
- Create a security strategy that is compliant with your privacy policies

Recommended CPE Credit

2 hours Computer Software and Applications

Next Generation Excel Reporting

Description

New and improved features in Excel tools such as Power Query and Power Pivot means that yesterday's techniques for generating reports in Excel are obsolete. Best practices for next generation reporting include building queries and transformations using Power Query, adding user-defined calculations with Data Analysis Expressions, managing data models in Power Pivot, reducing dependency on formulas with PivotTables, and adding visualizations where appropriate. Participate in this session so that you can learn the best practices for preparing and automating your Excel-based reports.

Major Subjects Covered

- Key issues with traditional reporting models
- The roles associated with various Excel features, including Power Query, Power Pivot, Data Analysis Expressions, and PivotTables in Excel-based reporting environments
- How to create “repeatable/refreshable” reports in Excel that link data from external data sources

Learning Objectives

Upon completing this session, you should be able to:

- List some of the deficiencies associated with traditional Excel-based reporting
- Identify the roles of tools such as Power Query, Power Pivot, and Data Analysis Expressions in next-generation Excel-based reports
- Create data queries and transformations using Power Query
- Identify the steps for managing Data Models in Power Pivot
- List the steps necessary for summarizing data from a Data Model using a PivotTable

Recommended CPE Credit

2 hours Accounting