



K2's 2021 Technology Conference

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Agenda

2021 Conference Agenda			
Length (Minutes)	Day One		
100	Tech Update		
10	<i>Break</i>		
100	Selecting & Vetting Technology Providers	Online Meeting & Collaboration Tools	Formatting Excel Spreadsheets the Right Way
60	<i>Lunch Break</i>		
100	CPA Firm Technology Strategies	Ten Teams Features You Can't Afford To Miss	The Power of Array Formulas in Excel
10	<i>Break</i>		
100	Password Management Tools - Why and How You Should Use Them		
10	<i>Break</i>		
Optional 45	Technology Town Hall - No CPE Credit		
Day Two			
100	Security Roundtable		
10	<i>Break</i>		
100	Amazing Accounting Add-on	Hosting, Self-Service, and Managed Service Options	Excel's Best New Features
50	<i>Lunch Break</i>		
50	Selecting Small Business Management Systems	Technology Planning for a Post-Pandemic Environment	Turbocharging Small Business Reporting with Power Query
10	<i>Break</i>		
50	Choosing Your Mid-Market Accounting	Backups Done Right	Power Automate Your Approvals
10	<i>Break</i>		
100	Tales of True Tech Crimes: Ripped from the Headlines		

Tech Update 2021

What technology trends significantly impact you? Which technologies will affect you and your business? This visionary session provides insights, choices, and recommendations. You will experience a summary of 5G, Wi-Fi 6E, and the latest hardware and software trends to help you make the best decisions. You are certainly going to discover at least one new technology you had not considered. This session provides strategic and tactical insight on technology choices.

Major Subjects Covered

- Hardware trends
- Software innovations
- Communication and collaboration tools
- Unusual technologies you might have missed
- Crucial 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 various products and able competitors
- Create strategic and tactical technology plans

Length: 100 minutes

Author: Randy Johnston

Field of Study: Information Technology

Selecting & Vetting Technology Providers

Managing Information Technology (IT) is difficult when team members, contractors, and others all sound alike. If you manage IT, wouldn't it be nice to know the questions you should ask? Join us in this session to learn the questions to ask your technology providers and how to identify some warning flags. The session materials can serve as a starting point for your discussions with your providers. Attend this session and learn many of the things you need to know as you navigate your journey through the world of technology.

Major Subjects Covered

- Qualifications and skills to look for in an IT provider, and the different types of IT providers
- The available options for delivering applications to end-users
- Guidance on what to buy and what to avoid when selecting hardware and software

Learning Objectives

- Select from a list of different approaches for delivering applications to end-users
- Identify the correct definition for each type of IT provider
- Pick the correct meanings associated with common IT certification acronyms
- Associate the various kinds of available software licenses with the correct descriptive fact pattern or definition
- Identify some of the critical service provider risks

Length: 100 minutes

Author: Brian Tankersley

Field of Study: Information Technology

Online Meeting & Collaboration Tools

We could work with team members at all levels and in all locations with today's collaboration and meeting tools. While the COVID-19 pandemic may have been the trigger event that forced many to use these tools for the first time, we discovered the advantages and capabilities. Which tools make sense for your organization?

In this session, we will cover the leading meeting and collaboration tools. We will note the features and benefits of options available and will provide a comparison of critical items. We will also explain deployment and control considerations from a management perspective, citing questions you can pose to technical consultants. If you want to improve your team's productivity, this session will give you independent guidance.

Major Subjects Covered

- Discern differences of features and benefits of meeting and collaboration tools
- List the most popular applications for collaboration and management
- Define your needs for collaborative tools
- Classify collaborative tools

Learning Objectives

Upon completing this session, you should be able to:

- Identify the cost and benefits of various meeting and collaboration tools
- Categorize various tools, services, and programs used for collaboration and meetings
- Define typical meeting and collaboration tool needs
- Differentiate collaborative tool features

Length: 100 minutes

Author: Randy Johnston

Field of Study: Computer Software & Applications

Formatting Excel Spreadsheets the Right Way

Some estimates indicate that business professionals spend as much as half their time in Excel working on formatting. If you are interested in getting better formatting results in less time, participate in this session to learn the best practices for applying formats in Excel.

In this session, you will learn the right way to apply formats in your workbooks. More specifically, you will learn about features such as Custom Format Codes, Templates, Styles, the Accounting Format, Precision as Displayed, date formats, and many others, all of which can save you substantial amounts of time when working in Excel.

Major Subjects Covered

- Creating and using Styles in Excel
- The Accounting Format and why you should use it
- How to Create Custom Formats
- Formatting dates for maximum impact
- The advantages of storing formats in templates

Learning Objectives

Upon completing this session, you should be able to:

- Identify the benefits of using Styles for formatting
- Specify which Custom Format codes are necessary for specific situations
- List advantages of using Excel template files
- Cite examples of when using the Accounting format is useful

Length: 100 minutes

Author: Tommy Stephens

Field of Study: Computer Software & Applications

CPA Firm Technology Strategies

CPA firms have always had challenging times, and the last two years emphasized that point. Technology changes, new service offerings, and profitable compliance will have to be executed well during the next five years. What technologies will you choose for 2021 and beyond? What is the best way to handle everything from better client interaction from PBC to eSignature through the best Advisory service strategy? How do the cloud, next-generation software, and client demands affect partner profitability? Attend this session to get an independent overview of the state of technology in the profession.

Major Topics 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

- 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

Length: 100 minutes

Author: Randy Johnston

Field of Study: Computer Software & Applications

Ten Teams Features You Can't Afford To Miss

Microsoft Teams is one of the most exciting technologies available today. Businesses of all sizes now use Teams to communicate and collaborate and enhance control over critical workflows and information. Yet most organizations running Teams have only scratched the surface of all it can do for them. In this session, you will learn about ten critical features in Teams that you and your team can use right away to make the most of this technology.

Major Topics Covered

- Collaboration options in Teams
- Using Teams to share information with people outside your organization
- Adding apps into Teams
- Securing Teams

Learning Objectives

Upon completing this session, you should be able to:

- Identify opportunities in Teams to communicate more efficiently with others
- List the steps necessary to use Teams to collaborate with people outside your organization
- Differentiate between various security protocols in Teams
- Identify business processes that you can improve by integrating other apps with Teams
- List examples of features available on the Teams app for mobile devices

Length: 100 minutes

Author: Tommy Stephens

Field of Study: Computer Software & Applications

The Power of Array Formulas in Excel

Array formulas have been available in Excel for decades. But recent enhancements to Excel have breathed new life into this feature. With the new “dynamic array” concept, you can leverage Excel’s array formulas in ways that you may have never imagined possible. In this session, you will learn how you can put the power of array formulas to work for you.

This session begins with an overview of Excel’s “legacy” array features and shows you how you can continue to take advantage of these tools. The course then discusses the recent enhancements to Excel that facilitate “dynamic arrays” and why these enhancements are so significant. To wrap up the conversation, you will learn from numerous practical examples of dynamic arrays and how you can put them to work for you.

Major Topics Covered

- Understanding arrays of data and how they are useful
- Distinguishing between “legacy” array formulas and array formulas in “dynamic array-aware” versions of Excel
- Using Excel’s new array functions, including SORT, FILTER, SEQUENCE, and UNIQUE
- Applied examples of array formulas

Learning Objectives

Upon completing this session, you should be able to:

- Identify examples of “legacy” array formulas
- List examples of when dynamic arrays can be useful
- Create formulas using Excel’s SORT, FILTER, UNIQUE, and SEQUENCE functions
- Cite examples of when using Dynamic Arrays is advisable

Length: 100 minutes

Author: Tommy Stephens

Field of Study: Computer Software & Applications

Password Management Tools – Why and How You Should Use Them

Correctly implemented passwords help protect valuable information. Both the complexity and the number of passwords required have multiplied. Further, it has been shown that using the same password for multiple sites or easy to guess passwords enable bad actors. Password management tools have emerged as a leading option for enhancing security to address these challenges.

In this session, you will learn how password management tools can help you implement, update, and manage your passwords. You will also learn about the features of leading password management tools and why these tools are necessary to improve security. Finally, if you hope to implement a passwordless approach, we will spend time on the current options. If you are seeking to enhance security, this session is an absolute must!

Major Topics Covered

- Identify why passwords are a critical element of information technology controls
- List the key characteristics of “long-and-strong” passwords and the new NIST guidelines
- Differentiate between leading password management tools
- Enumerate alternatives to passwords to improve authentication controls

Learning Objectives

Upon completing this session, you should be able to:

- Select current password management technologies from a list
- List characteristics of “long-and-strong” passwords and the new NIST guidelines
- Differentiate between various products and able competitors
- Identify leading methods to protect or change password use

Length: 100 minutes

Author: Randy Johnston

Field of Study: Information Technology

Technology Town Hall

The K2 Enterprises instructional team invites you to participate in the Technology Town Hall, a free-form 45-minute session that explores contemporary technology issues and trends. During this session, you will have the opportunity to ask questions and offer your insights and opinions on technology issues affecting business professionals. We hope you will take advantage of this opportunity, and we look forward to seeing you there. Please note that there are no CPE credits associated with this session.

Length: 45 minutes

Security Roundtable

Security issues continue to plague businesses of all sizes and in virtually all industries. Unfortunately, for many professionals, there are more questions than answers. In the Security Roundtable discussion, you will learn how to address your security issues and concerns and, in turn, mitigate your risk of a data breach. In this roundtable discussion, you will learn from the K2 Enterprises instructional team's collective experience, with all the instructors for your conference participating in this panel discussion.

Major Topics Covered

- Current trends in security risk
- Leading technologies and best practices to mitigate risk
- Assessing risk in your organization
- Options for reducing risk

Learning Objectives

Upon completing this session, you should be able to:

- Identify the most significant risks potentially impacting your business
- List examples of security options to mitigate risk
- Differentiate between options available for authentication
- List examples of tools you can use to assess your risk-reduction strategies

Length: 100 minutes

Author: Tommy Stephens

Field of Study: Information Technology

Amazing Accounting Add-ons

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 provides guidance on some of the best add-ons in the market. If you have needs that your current solution does not meet, you may not need to change it. 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-party 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

Learning Objectives

Upon completing this session, you should be able to:

- List the three everyday 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

Length: 100 minutes

Author: Brian Tankersley

Field of Study: Computer Software & Applications

Hosting, Self-Service, and Managed Service Options

Remote access has evolved beyond anywhere, anytime, any device access to full-service remote support. Various tools help us work virtually, starting with hosting productivity applications. In this session, you will learn about productivity applications and services, including multi-factor authentication, VOIP telephony, video conferencing, document management systems, portals, and Microsoft 365. Learn about options from Self-Serve to hosting to managed service provider options.

Of course, the goal 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.

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
- Critical applications for remote productivity and security
- Functional technology to consider for remote work

Learning Objectives

Upon completing this session, you should be able to:

- List significant 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

Length: 100 minutes

Author: Randy Johnston

Field of Study: Information Technology

Excel's Best New Features

With recent Excel updates provided through Microsoft 365/Office 365 subscriptions, Microsoft continues to pack new features into the popular spreadsheet tool. Enhancements to data analysis tools, new functions, and improved collaboration opportunities are available in more recent Excel versions. For those who know about these new features and 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 2016 and newer, including subscription-based Excel versions
- How to collaborate more effectively in newer versions of Excel
- The importance of Dynamic Arrays and related functions
- The continued evolution of Power Query

Learning Objectives

Upon completing this session, you should be able to:

- Apply primary new functions available in Excel, including STOCKHISTORY, SORT, and FILTER
- Employ Excel's co-authoring feature to collaborate in real-time with other users
- List at least three new functions that capitalize on Excel's Dynamic Arrays feature
- Utilize Excel's XLOOKUP and XMATCH functions to locate data in spreadsheets

Length: 100 minutes

Author: Tommy Stephens

Field of Study: Computer Software & Applications

Selecting Small Business Management Systems

Small businesses have new and traditional choices in accounting solutions. In addition to traditional solutions like QuickBooks and Sage 50, you can choose from Cloud-based tools 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 will know the best options for accounting in small business.

Major Topics 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 software strategy for your small business

Length: 50 minutes

Author: Brian Tankersley

Field of Study: Computer Software & Applications

Technology Planning for a Post-Pandemic Environment

Strategic and tactical business planning contributes to short and long-term success. Your technology plan should follow your business plan. But what if your goals become disrupted in the short term, and these events have long-term effects? Think 9/11, smartphones, or COVID-19 and consider if things will go back the way they were.

This session will consider the impact of remote work, security risks, collaboration tools, VOIP, and other tools your team require. How do we manage our various applications and meet our business plan goals? Attend this session to consider how technology planning works in the new normal.

Major Subjects Covered

- Identify technologies that enable remote and stay-at-home work
- List the critical security considerations for a virtual workforce
- Differentiate between options to meet your needs
- Enumerate technology options to include in your technology plans

Learning Objectives

Upon completing this session, you should be able to:

- Select remote and stay at home technologies from a list
- List critical security approaches for managing remote and work-from-home team members
- Differentiate between essential options to meet your needs
- Identify opportunities to improve your technology plan

Length: 50 minutes

Author: Randy Johnston

Field of Study: Information Technology

Turbocharging Small Business Reporting with Power Query

Every small business accountant knows and accepts the reporting limitations associated with entry-level tools. Most of these same professionals periodically export data to Excel, text, or other file formats to create custom reports to manage their business. The related data transformations required to utilize exported data can be automated using Microsoft's Power Query tool in Excel. With Power Query, these professionals can perform simple and complex tasks almost instantly. Participate in this session to learn how to use Power Query – a tool you already own – to create more accurate and timely reports for your small business.

Major Topics Covered

- Tips and tricks for accessing, transforming, and combining data exported from small business applications into meaningful reports using Power Query
- Methods of automating and enhancing report generation processes using templates and refreshing data from related applications
- Advanced Power Query techniques

Learning Objectives

Upon completing this session, you should be able to:

- Identify when you might utilize critical features available in Power Query, including getting data from tables, workbooks, text files, databases, web pages, and other sources
- List the steps to export data from QuickBooks Desktop and QuickBooks Online, and identify key source reports that you can use to export data from Excel into Power Query
- Define key terms associated with Power Query, such as DAX, ODBC, Power Pivot, Pivot Tables, and the M programming language
- Identify an example of when you might want to use the “Open from Folder” tool in Power Query

Length: 50 minutes

Author: Brian Tankersley

Field of Study: Computer Software & Applications

Choosing Your Mid-Market Accounting Solution

Legacy solutions are holding back businesses. Many mid-market companies are being transformed by upgrading their accounting solutions. In this new world of Software as a Service, workflow-enabled, data-centric, and connected solutions, you can solve existing and future business problems in new ways. This session covers integrated and ERP solutions that should work for businesses 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 Topics 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 standard third-party solutions needed
- Differentiate between a nice-to-have upgrade and a genuine business need
- Create an implementation plan for your business

Length: 50 minutes

Author: Randy Johnston

Field of Study: Computer Software & Applications

Backups Done Right

Where is your data? Do you have it controlled and backed up? If all your information is in the cloud, how do you verify that the backup recovery is rapid? If your data is in various silos from your application providers, how do you ensure you have the necessary protection and disposal approaches?

This session will help you understand and guide your IT team and providers to take the right actions to protect your business. Backup considerations, including cloud, backup appliance, disaster recovery, and business continuity approaches, are included. If you are from the trust but verify school of thought, this session will help you ask the right questions.

Major Topics Covered

- List the significant backup approaches
- Identify areas of critical weakness or threats in your backup and recovery systems
- List all critical and non-critical applications and establish their order of recovery
- Differentiate between backup solutions based on their features and benefits

Learning Objectives

Upon completing this session, you should be able to:

- Distinguish the differences in the top five methods for backup
- Detect common backup deficiencies
- Categorize backup priorities, including RPO and RTO
- Create an implementation plan for your business

Length: 50 minutes

Author: Randy Johnston

Field of Study: Information Technology

Power Automate Your Approvals

We live in a new normal: work-from-home, and applying this reality to our approval processes can be challenging. It requires a solution that functions regardless of location or device. What if we told you there was such a solution already available in many Office 365 / Microsoft 365 subscriptions?

In this session, we will introduce you to Power Automate. It is a wonderful service with hundreds of connectors that will allow you to automate a wide range of everyday approval actions. We will demonstrate how to send documents from person-to-person, and review them quickly and securely.

Major Topics Covered

- Power Automate connectors and actions
- Types of flows available
- Flow-building tips and tricks
- Automated approval demonstration

Learning Objectives

Upon completing this session, you should be able to:

- List examples of commonly used Power Automate connectors
- Cite commonly used Power Automate actions
- Identify and understand types of flows available
- List Power Automate benefits and challenges

Tales of True Tech Crimes – Ripped from the Headlines

2020 was an exceptional year for everyone, and like everyone, the hackers, scammers, and other technology criminals took advantage of new opportunities brought by COVID. Criminals reportedly used innovative approaches to exploit weaknesses created by the pandemic. You will learn tips and techniques from these events to help protect you, your company, and your data.

Attend this session and learn more about how high-profile control failures occurred so you can be more effective at preventing crimes such as theft, malware, ransomware, phishing, and hacking.

Major Topics Covered

- Common security weaknesses that occur with hardware and software at home and in the office
- Malware, ransomware, data breach, and incident response tips
- Internal control failures resulting in the theft of assets or unauthorized manipulation of data
- User authentication and security awareness training

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 year and explain at least one primary control design or operation flaws that allowed the hack to occur
- Select the correct definitions from a list of standard security terms such as attack surface, vulnerability, exploit, social engineering, phishing, malware, heuristics, biometrics, and multi-factor authentication (MFA)
- Explain why home-grade computer hardware and applications are sometimes less secure than business and enterprise-grade hardware and applications
- List at least three best practices learned because of reviewing the incidents cited in the case studies

Length: 100 minutes

Author: Brian Tankersley

Field of Study: Information Technology