



# K2's 2022 Technology Conference

## Agenda

<b>Day One</b>			
General Session (100 minutes)	<b>Tech Update 2022</b>		
<i>Refreshment Break</i>			
Breakout Session (100 minutes)	<b>Options To Automate Your Tax Preparation Workflow</b>	<b>Eight Awesome PivotTable Features</b>	<b>Emerging Topics In Blockchain And Cryptocurrency</b>
<i>Lunch Break</i>			
Breakout Session (100 minutes)	<b>CPA Firm Technology For The Future</b>	<b>The How's And Why's Of Data Analytics</b>	<b>Tales Of True Tech Crimes Ripped From The Headlines</b>
<i>Refreshment Break</i>			
General Session (100 minutes)	<b>Windows 11 - What End Users Need To Know</b>		
<b>Day Two</b>			
General Session (100 minutes)	<b>Security Risks And Solutions Roundtable</b>		
<i>Refreshment Break</i>			
Breakout Session (100 minutes)	<b>Safeguarding Taxpayer Data - A Guide For Your Required Security Plan</b>	<b>Automation For Increasing Personal Efficiency and Effectiveness</b>	<b>The Best Small Business Accounting Tools</b>
<i>Lunch Break</i>			
Breakout Session (50 minutes)	<b>Accounting Automation</b>	<b>How To Run Microsoft Office From The Cloud</b>	<b>Implementing Data Loss Prevention For Better Security And Privacy</b>
<i>Refreshment Break</i>			
Breakout Session (50 minutes)	<b>Choosing Your Mid-Market Accounting Solution</b>	<b>Supercharging Your Spreadsheet Collaboration</b>	<b>Privacy Issues And Solutions - What You Need To Know!</b>
<i>Refreshment Break</i>			
General Session (100 minutes)	<b>The K2 Team's Top Tech Productivity Tips and Tricks</b>		

# Tech Update 2022

The speed of technology change has been accelerating. But unfortunately, we can't keep up, and we don't know what to do about it. This visionary session provides insights, choices, and recommendations to help you decide how rapidly to move, which technologies will affect your business, and how to separate sales pitches from innovative ideas.

This session will explore emerging and evolving technologies important to accounting professionals. We will cover the benefits and risks of adopting new technologies in areas ranging from software applications to hardware devices. You'll also learn how to develop a balanced technology strategy that includes current, emerging, and future technology choices for your firm or business.

## Major Topics

- Hardware trends
- Software innovations
- Communication and collaboration tools
- Key products to consider for implementation

## Learning Objectives

- Select hardware and software that can enhance productivity and security
- Evaluate current communications choices to improve efficiency
- Differentiate between key products & able competitors to pick the best tools for the job
- Create strategic and tactical benefit lists that benefit you and your business

Author: Randy Johnston

Length: 100 minutes

# Options to Automate Your Tax Preparation Workflow

Tax Season can be a daunting time for tax preparers, but it doesn't have to be with the help of tax automation software tools and other innovative technology. This session will provide an overview of the latest technologies and tools that can help automate your workflow and make the entire tax return preparation process smoother and more efficient. From client portals, workflow management, and e-signatures to robotic process automation, you'll learn about all the options available to help streamline your tax preparation process. So don't dread Tax Season - attend this session and arm yourself with the tools you need to succeed!

## Major Topics

- Tax automation software options
- Learn about the best client collaboration options
- Leave with a checklist of tools to consider your tax practice

## Learning Objectives

- Identify key tax return preparation processes that have technology automation solutions
- Differentiate between vendor options for key tax return preparation processes
- List examples of how preparers can use RPA to automate tax processing

Author: Randy Johnston

Length: 100 minutes

# Eight Awesome PivotTable Features

Are you looking to take your PivotTables to the next level? Many experts consider PivotTables to be Excel's most powerful feature. Yet, most who create and work with them barely scratch the surface of all that PivotTables can do. In this session, you'll learn eight powerful features you may have missed. From user-defined calculations to consolidating reports and adding KPIs, we'll show you how to get the most out of your PivotTables. These are just some examples of the great things you can do with PivotTables, and in this session, you will learn these and other techniques to make your PivotTables even more powerful.

## Major Topics

- Adding user-defined calculations to PivotTables
- Enhancing PivotTables with Key Performance Indicators
- Using PivotTables to consolidate "standard" Excel reports
- Creative ways to filter PivotTables
- Linking accounting software data into PivotTables

## Learning Objectives

- Identify three types of user-defined calculations in PivotTables
- List the steps necessary to add Key Performance Indicators to PivotTables
- Name at least two benefits of using PivotTables for data consolidation needs
- Differentiate between Slicer and Timeline filters
- Cite examples of potential benefits associated with linking data into PivotTable reports

Author: Tommy Stephens

Length: 100 minutes

# Emerging Topics in Blockchain and Cryptocurrency

Blockchain is one of the most-watched emerging technologies. Yet, few accountants understand how to use this technology to make existing ledger-based systems more efficient, effective, and tamper-resistant. In this session, you will learn the basics of blockchain-based ledgers. You will also learn about the fundamentals of cryptocurrencies such as Bitcoin and Ripple. Additionally, you will learn about emerging issues in these fields, such as stablecoins, central bank-issued digital currencies, smart contracts, and sovereign identity management. By attending this session, you will see how blockchain-based technologies will change your work with others.

## Major Topics

- Blockchain basics and regulations
- Cryptocurrencies, stablecoins, and blockchain-enabled central bank digital currencies
- Smart contracts, sovereign identity management, cross-border funds transfer
- Emerging uses for blockchain-based ledgers

## Learning Objectives

- Select the correct definitions for key terms associated with blockchain-based ledgers
- Differentiate the features of a cryptocurrency, a stablecoin, and a central bank-issued digital currency
- Identify key features associated with a smart contract, distributed finance, and sovereign identity
- Select from a list at least three different uses for blockchain-based ledgers covered in the course

Author: Brian Tankersley

Length: 100 minutes

# CPA Firm Technology For The Future

The next five years are going to be eventful for CPA firms. The profession has never seen such rapid change, with new and changing technologies appearing almost daily! So, what will your firm do?

How can you keep up without getting overwhelmed by these fast-paced transformations in the profession and stay profitable during this turmoil? What are the best technologies to handle client interactions, PBC lists, electronic signatures, and Advisory services? How do the cloud, next-generation accounting 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

- 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

Author: Randy Johnston

Length: 100 minutes

# The How's and Why's of Data Analytics

Increasingly, accountants and auditors are called upon to use data analytics to understand and improve results. Yet, many professionals struggle with the concept of data analytics and remain unaware of how to obtain the results needed using tools they already own.

In this session, you will learn about the four primary types of data analytics and when to use each. Further, you will learn how to generate meaningful analytical measurements using Excel, Power BI, and other tools and, more importantly, how to interpret the results. If you seek to use data analytics – and who isn't – this session is for you.

## Major Topics

- Understanding the four types of data analytics
- Differentiating between correlation and causation
- How to generate data analytics in Excel and other applications already in use
- The role of Artificial Intelligence in data analytics

## Learning Objectives

- List the four types of data analytics
- Identify examples of analytics available in Excel's Analysis ToolPak
- Differentiate between correlation and causation
- Identify at least two analytical techniques available in Microsoft's Power BI platform

Author: Tommy Stephens

Length: 100 minutes



# Tales of True Tech Crimes Ripped from the Headlines

We're all familiar with the headlines describing how criminals use new and creative approaches to commit their crimes. But what you may not know is that these same criminal elements also target accounting professionals. Unfortunately, accountants are one of the most targeted groups on the Internet!

In this session, you will learn how high-profile failures occurred due to control malfunctions. In turn, hackers gained full reign over entire networks that contained sensitive information such as financial data stored online. Attend this session so you can be more effective at preventing crimes such as theft, malware, ransomware, phishing, and hacking.

## Major Topics

- Common security weaknesses which 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 data manipulation

## Learning Objectives

- 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
- List at least three best practices learned because of reviewing the incidents cited in the case studies

Author: Brian Tankersley

Length: 100 minutes

# Windows 11 – What End Users Need to Know

A burning question on the minds of many is, “What features should I use in Windows 11?” Presented with end-users in mind, in this session, you will get the answer you need to that question and others, all delivered in the context of improving productivity and security.

Among other topics, you will learn about improvements in virtual desktops, changes to the user interface, customization options, and more. If you’re using Windows 11 now or plan to upgrade soon, this is a must-see session to help you make the most of your upgrade.

## Major Topics

- Productivity improvements in Windows 11
- How to work with virtual desktops
- Customizing the user environment
- Improved security tools available in Windows 11

## Learning Objectives

- Identify the process for managing open windows in Windows 11 using Snap Assist
- List an example of a security improvement in Windows 11
- Identify the process of re-positioning the taskbar
- Define “widgets” in Windows 11 and identify how to add them

Author: Tommy Stephens

Length: 100 minutes

# Security Risks and Solutions Roundtable

Security remains one of the top issues on the minds of most business professionals today – and for a good reason! Unfortunately, given the ever-increasing volume of sensitive data our organizations store and manage, we have become prime targets for cybersecurity attacks. Fortunately, we can take steps to reduce our risks significantly. This session will teach you which measures will benefit you and your organization the most.

In a roundtable format, you will learn about security risks and solutions from the breadth and depth of experience of the K2 Enterprises team. A vital aspect of this session is the opportunity to ask questions of your presenters.

## Major Topics

- Today's major cybersecurity threats
- Examples of data breach issues that should be concerning
- Practical solutions that you should consider implementing to reduce risk

## Learning Objectives

- Identify leading cybersecurity risks that businesses face today
- List examples of critical solutions you should consider implementing
- Differentiate between risk and solution profiles, depending on the size of a business

Author: Tommy Stephens

Length: 100 minutes

# Safeguarding Taxpayer Data – A Guide for Your Required Security Plan

Combatting today's cybercriminals takes all of us working together. Canada Revenue Agency works with provinces, tax professionals, and individuals to fight these 21st-century identity thieves. Unfortunately, data thefts at tax professionals' offices are on the rise. Online providers should follow the leading security and privacy standards. Targeting you for Identity theft of business and individual information is a common bad actor tactic. Learn how to fulfill your fiduciary obligations by participating in this session.

## Major Topics

- Understand the need for protecting client data
- Learn about the required security and privacy standards
- Leave with a sample plan to consider your tax practice

## Learning Objectives

- List examples of basic security steps and how to take them
- Identify the signs of data theft and how to report data theft
- List examples of how to respond and recover from a data loss
- Identify examples of specific compliance issues found in the FTC Safeguards Rule

Author: Randy Johnston

Length: 100 minutes

# Automation for Increasing Personal Efficiency and Effectiveness

Automation is a great way to save time and improve accuracy and effectiveness. It also allows you to get more value from your workday. This session will teach you how to automate the tasks that are mundane or take up too much energy, so you complete them automatically instead. One of the best things a person can do is invest time into automating their workday to help them achieve more work, reduce daily stress, and provide better mental clarity.

This session focuses on various tools and services you can use to help promote personal automation. In it, you will learn about technologies such as integration platform tools, Amazon Alexa and Google Home, and the Elgato Stream Deck.

## Major Topics

- Automation opportunities
- Understanding integration platforms
- Productivity tips, tricks, and applications
- Tips and tricks for saving valuable time

## Learning Objectives

- Define automation and demonstrate different use cases
- Identify processes in your personal and professional life where you can use automation to save time
- Distinguish between various automation platforms
- Identify the steps necessary to establish an account with an integration-as-a-platform-service (iPaaS) provider and create automation workflows for daily tasks such as email, calendaring, and document management
- Leverage the power of the Elgato Stream Deck for the simple use of application hotkeys and launching automation process with the touch of a button

Author: Steve Yoss

Length: 100 minutes

# The Best Small Business Accounting Tools

Working with a small business, you know that keeping the company's finances in order is critical to success. While numerous software programs and tools are available to help you do this, they vary substantially in many significant aspects. In addition to conventional options like QuickBooks and Sage 50, you can choose from Cloud-based tools such as Zoho Books, QuickBooks Online, Spire Systems, Xero, Accounting Suite, Accounting Power, and many more.

In this session, we'll look at the best accounting tools for small businesses and discuss the benefits of each one. This session covers accounting solutions that should work for startups and companies with up to \$10 million in annual revenue. So, whether you work with a startup or an established small business, attend this session to find out which tools can help you achieve your financial goals.

## Major Topics

- 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

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

Author: Randy Johnston

Length: 100 minutes

# Accounting Automation

Why can it be hard to automate accounting? Because many accountants don't know their options and, therefore, fail to reap the rewards of accounting automation.

This session will teach you how easy and profitable accounting automation can be. In it, you will learn how to automate many traditional accounting processes, often with technology you already own. In addition to bank feeds, you will learn about automation options for processing accounts payable and receivable, approving transactions, and linking data from one platform to another. If you are serious about improving efficiency and accuracy, you should make plans to attend this session.

## Major Topics

- Key automation opportunities
- Benefits and risks associated with automation
- Primary tools available for automation efforts

## Learning Objectives

- List at least three examples of automation opportunities in businesses today
- Identify examples of core technologies used in automation efforts
- Differentiate between tasks ideal for automation and those which humans should perform
- Identify the importance of Robotic Process Automation to your accounting automation efforts

Author: Tommy Stephens

Length: 50 minutes

# How to Run Microsoft Office from the Cloud

Cloud-based options of familiar Microsoft Office applications have been available for over a decade. Moreover, these tools have matured to the point where their functionality rivals desktop-based options. Further, the ease of deploying, accessing, and using these tools is striking.

In this session, you will learn about Cloud-based alternatives to everyday desktop applications and why you should consider adding them to your toolbox. You will also learn about the relative strengths of competitive services available from Zoho and Google and why you should consider these tools. Knowing all your options is imperative in the new cloud-connected world!

## Major Topics

- How to acquire and access Cloud-based Microsoft Office tools
- The relative strengths and limitations of Cloud-based services compared to their desktop counterparts
- Data storage requirements and options
- Cloud-based options available from Zoho and Google

## Learning Objectives

- List at least three benefits of using Cloud-based services for traditional computing activities, such as spreadsheets and word-processing
- Differentiate between the features available in Cloud-based options relative to their desktop counterparts
- List at least two means by which you can access Microsoft's Cloud-based tools

Author: Tommy Stephens

Length: 50 minutes



# Implementing Data Loss Prevention for Better Security and Privacy

Data Loss Prevention (DLP) is a means of creating and enforcing security policies in an organization. For example, you can create DLP rules that programmatically block all outbound email messages containing Social Security or credit card numbers. Unfortunately, most business professionals have yet to discover DLP and how it improves security.

In this session, you will learn the fundamentals of DLP and, through demonstrations, see how you can use DLP to enhance organizational security. You do not want to miss this chance to learn how to take advantage of one of the most innovative security options available to you!

## Major Topics

- Understanding the concept of Data Loss Prevention
- Examples of how DLP rules are beneficial
- Creating and enforcing DLP rules

## Learning Objectives

- Define Data Loss Prevention and list examples of how it can enhance organizational security
- List examples of tools and services available that support DLP
- Identify the process for creating DLP rules in platforms such as Microsoft 365

Author: Randy Johnston

Length: 50 minutes

# Choosing Your Mid-Market Accounting Solution

Many businesses are being held back by legacy solutions. The old way of doing things just doesn't work anymore. Instead, Software as a Service (SaaS) has transformed many mid-market companies. In this new world of cloud-based, workflow-enabled, data-centric, and connected solutions, you can solve existing and future business problems in new ways without being bogged down by paper-centric environments.

This session covers integrated and ERP solutions that should work for businesses in the \$10 Million to \$1 Billion range. If your existing system has been in place for seven or more years, it is time to consider upgrading or replacing it. Leverage your instructor's knowledge of the market to minimize your risk.

## Major Topics

- 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

- 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

Author: Randy Johnston

Length: 100 minutes

# Supercharging Your Spreadsheet Collaboration

Collaboration is a key to productivity and success. But remote work can make collaboration more challenging, including collaborating on spreadsheets. Fortunately, tools such as portals with check-in/check-out capabilities, version control, comment tracking, and co-authoring can enable online spreadsheet collaboration. Further, Excel's Inquire tool can facilitate spreadsheet collaboration in offline environments.

Don't let remote work hamper your spreadsheet collaboration needs! Participate in this session to learn how to collaborate on spreadsheets effectively from anywhere using tools you already own or license.

## Major Topics

- Collaboration methods using Microsoft Office and Microsoft 365
- Ways to track changes to sheets and compare different versions of a file
- Tools for sharing and responding to comments among a team from within a file

## Learning Objectives

- Select various Excel features associated with collaboration
- List the steps necessary to use Excel's Inquire tool to identify differences between two spreadsheets
- Differentiate between the capabilities of Excel's Notes feature and its' Comments feature
- Choose the correct definitions for key terms associated with file storage such as check-in/check-out and version control from a list of options

Author: Brian Tankersley

Length: 50 minutes

# Privacy Issues and Solutions – What You Need to Know!

Privacy should be everywhere, yet every day seemingly brings a new story about a privacy violation. While it can be frustrating and sometimes scary to think about mishandling our personal information, it's important to remember that we can take steps to protect our privacy.

This session will teach you where your critical threats are and what information you may already have at risk. More importantly, you will learn how to manage and mitigate privacy risks. In an era of increasing connectivity – and by extension, risk – this session should be high on your list to take as soon as possible.

## Major Topics

- The most significant privacy threats today
- Your browser and search engine and why they matter
- Privacy policies – the fine print

## Learning Objectives

- Identify examples of critical privacy threats
- Cite examples of how your data becomes compromised through web browsers and search engines
- List maneuvers you can make to reduce your privacy risk

Author: Tommy Stephens

Length: 50 minutes

# The K2 Team's Top Tech Productivity Tips And Tricks

The world of work changed radically and became much more virtual after the pandemic's onset in 2020. Over two years into the "new normal," our team has compiled a list of the top technology productivity tips, tricks, and traps. In this session, you will learn about shortcuts and hacks to help you accomplish more in Excel, Teams, Outlook, virtual meetings, and many other applications you use every day. Attend this session and learn the best tips to help you and your team accomplish more in less time.

## Major Topics

- Microsoft 365 tricks and tips
- Best practices for virtual meetings
- Productivity-enhancing apps and tools that you should consider using

## Learning Objectives

- Identify steps necessary to construct a Microsoft Teams site
- List examples of essential productivity tips for typical Microsoft 365 applications
- Identify examples of when you can use templates and forms to automate data collection

Author: Brian Tankersley

Length: 100 minutes