K2's Tech Update

Description

What are my best technology choices, and how do I keep up? Even informed accounting professionals will find multiple ideas they can apply daily. This visionary session provides insights, options, and recommendations to help you decide which technologies will affect your business and which will give you a competitive edge. Included in Tech Update are emerging and evolving technologies important to accounting professionals. We will cover the benefits and risks of adopting recent technologies, ranging from software applications to hardware devices. You will 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 and software trends
- Communication and collaboration tools
- Key products to consider for implementation
- Emerging technology in accounting automation, metaverse, and blockchain

Learning Objectives

- Create strategic and tactical benefit lists of hardware and software options
- Evaluate current communications choices to improve your efficiency
- Identify key technologies to implement in your business and personal life
- List examples of emerging technologies that will affect the accounting profession

Who Should Attend

Accounting professionals interested in choosing and managing technology

Program Level

Update

Field Of Study

Information Technology

Recommended CPE Credit Hours

2

Prerequisites

None

Advanced Preparation

None

K2's CPA Firm Update

Description

It's an exciting time to manage a public practice accounting firm! In addition to technical knowledge in tax, auditing, and accounting, we need to understand data analytics and security options in an advisory context. Beyond that, we must manage the practice and people while profitably delivering excellent client service in a competitive environment for the owners. Further, portals, CAS stacks, PBC lists, electronic signatures, Cloud, and robotic process automation are technologies we need to understand beyond our tax, audit, practice management, document management, and workflow systems. This CPA Firm Update session independently covers significant trends and technologies for CPA firms, which will help you understand your current and future choices. With such rapid change, what will your firm do?

Major Topics

- • Trends in the profession, including supplier changes
- • Software products by service lines
- • Innovation and automation tools
- • Specific technology stacks to improve productivity and profitability

Learning Objectives

- • List changes made by major suppliers to the profession
- • Identify software for service line and niche solutions
- • Define automation opportunities in accounting firms
- • Differentiate tools from a technology stack that fits your firm best

Who Should Attend

Partners, Managers, and IT staff responsible for choosing and deploying CPA firm applications

Program Level

Update

Field Of Study

Information Technology

CPE Credit Hours

2

Prerequisites

None

Advanced Preparation

None

K2's Now Is The Time To Automate!

Description

The term "automate" has been an industry buzzword for at least a decade. Yet, few organizations have embarked on successful automation journeys, leading to greater efficiencies, reduced errors, and happier team members. In this session, you will learn how to crank up your automation projects and see first-hand how easy and effective automation can be. More specifically, this session shows you exactly how you can work with tools from Zoho, Zapier, and Microsoft to enable powerful routines that will allow you and your team to get more done in less time.

Major Topics

- Where to begin your automation journey
- Which automation tools should you initially focus on
- How to automate everyday tasks in accounts payable, banking, and approval workflows
- Common automation pitfalls

Learning Objectives

- Identify at least three benefits of successful automation efforts
- List two automation tools you can use to extract and transform data
- Specify examples of Microsoft 365 plans that include access to Power Automate
- Differentiate between Power Automate and Zapier
- Identify at least three tasks that most businesses should automate

Who Should Attend

Accounting and financial professionals desiring to improve efficiency, accuracy, and internal control

Program Level

Intermediate

Field Of Study

Information Technology

CPE Credit Hours

2

Prerequisites

Fundamental understanding of basic computer operations

Advanced Preparation

None

K2's Using OneNote More And Email Less

Description

OneNote is a fantastic application included in your Microsoft 365 subscription. Yet, it is underutilized and misunderstood most of the time. If you genuinely want to change how you work, embrace OneNote. Stop using Outlook as a filing cabinet for essential emails and move them to OneNote instead. If you share a OneNote notebook with others, you can stop emailing altogether within your group and use OneNote as your collaboration and reference platform.

Major Topics

- Using OneNote as a powerful reference resource
- Learn how to move your emails into OneNote
- Share OneNote with a group of people and communicate within a notebook rather than email.

Learning Objectives

- List tasks for which you might choose to use OneNote
- Identify ways to reduce email and use OneNote for yourself and your group or team
- Cite examples of how you can use OneNote for storing and retrieving important reference information
- Identify the process for acquiring OneNote

Who Should Attend

Business professionals seeking to enhance their understanding of Microsoft OneNote and looking for a new way to organize their email communications

Program Level

Overview

Field Of Study

Computer Software & Applications

CPE Credit Hours

2

Prerequisites

Basic understanding of Microsoft apps

Advanced Preparation

None is required; however, we recommend having OneNote accessible during class

K2's Collaboration – Portals, Payments, And Signatures

Description

Demands for an excellent user experience are at an all-time high. But how do you solve for easy collaboration, compliance, and workflow? What features do you need to be effective? How do you integrate payments, eSignatures, and other technologies to make interaction convenient? This session will explain the necessary features, provide an overview of the best technologies for collaboration, and help you think through how to solve your business problems. You'll learn about the options available from client portals, workflow management, payments, eSignatures, and more. Attend this session and arm yourself with the tools you need to succeed!

Major Topics

•   Portals as collaboration enablement

•   Learn about payment options you can integrate into your portal

•   Leave with a checklist of features to consider for collaboration

Learning Objectives

•   Identify portal products that fit your needs

•   Differentiate between vendor options for payment processes

•   List examples of eSignature needs and features

Who Should Attend

Accounting professionals interested in collaboration technology, including portals, payments, and eSignatures

Program Level

Basic

Field Of Study

Computer Software & Applications

CPE Credit Hours

2

Prerequisites

None

Advanced Preparation

None

K2's Shredding Your Servers And Going Virtual

Description

Most small and mid-sized businesses are at least considering cloud-based suites for business management, performance management, and productivity. Unfortunately, many owners and accounting professionals need to learn the difference between using cloud-native tools, employing a managed service provider, and utilizing a desktop hosting provider. This session helps participants understand the differences in the levels of service provided by these offerings and will also highlight some of the regulatory barriers which could create problems for your organization. Attend this session and learn what you need to know before saying "see ya" to your servers.

Major Topics

- The similarities and differences in desktops managed by a managed service provider, a desktop/application hosting company, and a browser-based cloud
- Regulatory requirements like HIPPA, GLB, PCI, and more
- Practical tips for dealing with service providers

Learning Objectives

- Identify critical differences between a managed service provider, a desktop/application hosting company, and a browser-based cloud solution
- From a list of regulations, identify a practical restriction on users imposed by the regulation
- Identify services included in productivity suites from Microsoft, Google, and Zoho and match them to the tools which best address an identified business need

Who Should Attend

Accounting professionals who are responsible for selecting, implementing, or working in an environment which is reducing or eliminating on-premises servers

Program Level

Overview

Field Of Study

Information Technology

CPE Credit Hours

2

Prerequisites

None

Advanced Preparation

None

K2's Taking Another Look At PDFs

Description

We're all familiar with PDF documents. However, it's safe to say that most professionals use only a tiny fraction of their features. This circumstance is unfortunate, considering all you can do with PDF documents. Therefore, isn't it time to take another look at PDF documents and all you can do with them?

Participate in this session to learn more about PDFs and how and why they should be a cornerstone technology in most organizations. Collaboration options, long-term storage and archival, and fillable forms are just a few features you will learn about in this session. This session is for you if you're ready to elevate your PDF productivity!

Major Topics

- Understanding the Portable Document Format
- Identifying tools you can use to work with PDFs
- Collaborating using PDFs
- Creating, distributing, and collecting fillable PDF forms
- Using PDFs to enhance security

Learning Objectives

- List examples of PDF software vendors
- Differentiate between PDF options available from Adobe
- List at least two ways you can use PDFs in collaborative environments
- Identify critical steps in the process used to create fillable PDF forms

Who Should Attend

Business professionals seeking to enhance their understanding of PDFs

Program Level

Intermediate

Field Of Study

Computer Software & Applications

CPE Credit Hours

2

Prerequisites

Fundamental understanding of PDFs

Advanced Preparation

None

K2's The Best Kept Secrets Of Microsoft 365

Description

Many organizations have implemented Microsoft 365/Office 365 at a basic level, but few have truly explored the breadth and depth of tools included with their subscriptions. Some less commonly known apps help you manage shared email boxes, create and use web forms, schedule appointments, trade shifts, create real-time closed captions, and translate presentations. Attend this session and learn more about the hidden features in Microsoft 365 that you can use to level up your productivity.

Major Topics

- New features and tips and tricks in Microsoft 365
- Learn how to take advantage of optional services like Bookings, Shifts, Information Rights Management, and Approvals
- See some of the tools you can activate to help your team create and share video content intended only for internal use

Learning Objectives

- Select at least three optional services included with Office 365
- List at least two tools that extend Microsoft Teams to perform new tasks
- Identify at least one optional Office 365 service which protects confidential information

Who Should Attend

Anyone who wants to make the most of their Microsoft 365/Office 365 subscription at work

Program Level

Basic

Field Of Study

Computer Software & Applications

CPE Credit Hours

2

Prerequisites

None

Advanced Preparation

None

K2's Ripped From The Headlines – Outrageous Tales Of Cybercrimes

Description

Remote work environments have created many new opportunities for cybercriminals and other fraudsters to exploit, and accounting professionals are some of the most commonly targeted individuals. This session is a series of case studies that examine actual criminal filings and news accounts and use them to highlight some of the actions you can take to limit your exposure to similar schemes. Attend this session and learn more about how high-profile control failures occurred so you can be more effective at preventing crimes in your organization.

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 that resulted in the theft of assets or unauthorized manipulation of data
- User authentication and security awareness training

Learning Objectives

- List at least three major security incidents reported in the headlines in the last year, and explain at least one primary internal control design or operation flaws that allowed the hack to occur
- Select the correct definitions for security terms such as attack surface, vulnerability, exploit, social engineering, phishing, malware, heuristics, biometrics, and multi-factor authentication (MFA)
- List at least three best practices learned by reviewing the control failures cited in the case studies

Who Should Attend

Managers, owners, and accounting professionals who desire to learn from computer crime incidents best practices they can use to enhance their organization's security posture

Program Level

Basic

Field Of Study

Auditing

CPE Credit Hours

2

Prerequisites

None

Advanced Preparation

None

K2's Accounting Solutions And Add-Ons For Small Businesses

Description

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. We also cover various add-on solutions that can enhance the overall functionality of your accounting platform. Join us to learn your options for achieving your small business management financial goals.

Major Topics

- Overview of small business accounting solutions
- Strengths and shortfalls of various accounting and add-on 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
- List examples of add-on solutions that can fill functionality gaps

Who Should Attend

Accounting professionals seeking to understand their options in the entry-level accounting software market

Program Level

Update

Field Of Study

Computer Software & Applications

CPE Credit Hours

2

Prerequisites

None

Advanced Preparation

None

K2's The Digital Home

Description

Your home is now the digital center of your world, and even if you go to an office every day, you have more options to help you manage everything from shopping lists to email accounts. Unfortunately, many new devices your family connects to your WiFi can create security risks and may make remote work and school less secure. For example, tracking devices and services can help parents monitor children and seniors, but outsiders can use the same tools to stalk their loved ones digitally. This session will help you learn about devices, services, and app suites for families, share files, organize photos, manage passwords, and keep your home secure. Attend this breakout and learn about innovative new tools to help you stay safe and make the most of your time away from the office.

Major Topics

- Configuring your router and network to make it more secure
- Review online services to help your family share information and stay in touch
- Take advantage of the latest home gadgets and devices from CES 2023 and understand what technologies are "ready for prime time" and which ones you should skip

Learning Objectives

- List at least one of the services mentioned to help your family stay in touch and manage a shared calendar
- Identify at least two key features and settings needed in your home's wireless router
- Name at least two services to help you take better advantage of your entertainment service subscriptions

Who Should Attend

People who want to learn best practices for protecting their family and enhancing the ability to communicate with one another.

Program Level

Basic

Field Of Study

Computer Software & Applications

CPE Credit Hours

2

Prerequisites

None

Advanced Preparation

None

K2's Top Ten Outlook Tips

Description

Using Outlook for email management is routine for most business professionals these days. But unfortunately, using this tool for so long may cause some to perpetuate bad practices and habits when working in Outlook and exploring new options Outlook offers. In this session, you will discover ten valuable tips to take you to the next level of your email and work management.

Major Topics

- Action your email with more than just a flag
- Working more efficiently by structuring your screen better, creating shortcut buttons, using Categories, creating Search folders, and using boards
- Store emails in better places so you can reference them faster
- Stop typing and use templates instead

Learning Objectives

- Cite examples of how to action and sort your emails faster
- List examples of valuable shortcuts you can add to Outlook
- Identify options for storing your email, so that referencing is easy
- List examples of using boards to access information more quickly
- Cite examples of how categories and search folders can improve efficiency
- Identify processes for cleaning up email quickly
- List the steps for creating templates to save time

Who Should Attend

Business professionals who desire to enhance their understanding of Microsoft Outlook

Program Level

Intermediate

Field Of Study

Computer Software & Applications

CPE Credit Hours

2

Prerequisites

Basic understanding of Microsoft Outlook

Advanced Preparation

None

K2's Accounting Solutions: Mid-Market

Description

Many businesses are being held back by legacy solutions. The old way of doing things 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 in 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

Who Should Attend

Accounting professionals who need to understand the changes and options in Mid-Market accounting software

Program Level

Update

Field Of Study

Computer Software & Applications

CPE Credit Hours

1

Prerequisites

None

Advanced Preparation

None

K2's Simplifying And Economizing Your Tech Stack

Description

All business professionals need access to the necessary technology to help them perform their jobs efficiently and effectively. Yet, no one should overpay for their tech stack. Unfortunately, though, many are overpaying and have yet to realize it. In this session, you will learn valuable tips to help you simplify and economize your technology stack. Participate in this session to avoid the risk of overpaying for your tech tools.

Major Topics

- Taking an inventory of installed applications and tools
- Identifying the tech tools you need and those you don't
- Canceling unnecessary licenses and subscription services

Learning Objectives

- Identify tech tools installed in business environments
- List examples of features in tech stacks often duplicated across applications
- Cite examples of applications and services that are less expensive alternatives to traditional technologies
- Calculate the total cost of ownership of specific tech tools

Who Should Attend

Accounting and financial professionals seeking to ensure they have the tech tools they need without overspending

Program Level

Intermediate

Field Of Study

Information Technology

CPE Credit Hours

1

Prerequisites

Basic knowledge of technology and software licensing

Advanced Preparation

None

K2's Six Essential Teams Features

Description

The mad scramble to remote work and utilize apps like Teams has been trying for most organizations over the past couple of years. With a rush to install and no time to plan, most team members did their best, prioritizing remote meetings as the primary concern. Therefore, as a result, Teams is vastly misunderstood and underutilized in most organizations. Join us in this session to go beyond the remote meetings aspect of Teams and to learn how to optimize efficiency, communication, and workflow with Teams.

Major Topics

- Learn how to set up Teams for successful collaboration
- Create a filing system that does not include endless sub-folders
- Manage staff delegation and follow-ups with ease
- Define what Lists need to be available to your Team
- Discover how to create automatic Flows that can notify others of update
- Utilize survey Forms or questionnaires from within Teams

Learning Objectives

- List steps for creating effective Teams and Channel structures
- Identify how to setup file management columns for more information within Teams
- Specify examples of how to work with Microsoft Planner within Teams
- Identify how Lists work and why they can be better than spreadsheets
- Identify options for incorporating Power Automate into Teams
- Cite examples of how to use Microsoft Forms within Teams

Who Should Attend

Business professionals seeking to enhance their understanding of Microsoft Teams

Program Level

Overview

Field Of Study

Computer Software & Applications

CPE Credit Hours

1

Prerequisites

Basic understanding of Microsoft Teams

Advanced Preparation

None

K2's Kicking It Up A Notch With KPIs

Description

The adage, "what gets measured, gets managed," has never been more true than it is today. Organizations of all kinds and sizes are creating systems and processes to categorize, track, and report on many of their operations by creating reports featuring key performance indicators (KPIs). This session will teach you about many different kinds of KPIs. Further, you will learn how to find data and use tools like Microsoft Excel and Power BI to measure performance. You will also identify the benefits and drawbacks of using KPIs in management philosophies like holacracy to make it easier for employees to know in real time where they stand.

Major Topics

- Types of KPIs
- How to look for data in your existing systems
- The basics of data prep tools
- Tools for tracking and reporting on KPIs

Learning Objectives

- Identify the correct definition for terms associated with key performance indicators from a list of options
- Differentiate the benefits and limitations of using tools such as Excel, Power BI, and Tableau for reporting KPIs
- When presented with the name of an Excel or Power Query feature discussed in the session, select the definition that best describes the feature
- List examples of KPIs that might be useful in many business environments

Who Should Attend

Accounting and financial professionals who want to learn and utilize best practices for measuring business performance

Program Level

Basic

Field Of Study

Computer Software & Applications

CPE Credit Hours

1

Prerequisites

Basic understanding of Microsoft Excel

Advanced Preparation

None

K2's Understanding Your Ransomware Risk

Description

Protecting yourself from ransomware requires more than just anti-virus software. Additional technology protections are necessary. Further, business continuity, legal and regulatory, and cybersecurity insurance considerations should all be a part of your risk abatement strategy. Attend this session to determine if your current level of ransomware protection reduces your risk to an acceptable and identify ways to ensure that you are protected.

Major Topics

- Understanding how ransomware can cripple a business
- Trends in ransomware attacks
- Best practices for minimizing ransomware risk

Learning Objectives

- Distinguish between various options to mitigate risk
- Identify practical actions for reducing ransomware risk
- List examples of high-profile ransomware attacks and how they occurred

Who Should Attend

Accounting and financial professionals seeking to improve data security by minimizing ransomware threats

Program Level

Update

Field Of Study

Information technology

CPE Credit Hours

1

Prerequisites

Basic knowledge of computer operations

Advanced Preparation

None

K2's OneDrive's Best Practices

Description

Although Windows incorporates the OneDrive app, you may not have configured it correctly for your specific needs. Using the OneDrive app and the related Cloud storage service to their fullest potential means you can access your files when and where you need them. Further, sharing your files and collaborating with others is easy when using OneDrive correctly. In this session, you will learn best practices for taking full advantage of OneDrive.

Major Topics

- Navigating to OneDrive on the web
- Synchronizing your files to your desktop pc
- Working with shared files
- Managing different versions of files
- Understanding how OneDrive works with OneNote, Teams, and SharePoint

Learning Objectives

- Identify options for accessing and managing your files in OneDrive
- List the steps necessary to synchronize your files from the Cloud to your computer
- Identify opportunities for sharing files and accessing previous versions of a file
- Name the steps for creating a OneNote notebook in OneDrive
- List options for viewing OneDrive thru Teams or SharePoint

Who Should Attend

Business professionals who seek to enhance their understanding of Microsoft OneDrive

Program Level

Intermediate

Field Of Study

Computer Software & Applications

CPE Credit Hours

1

Prerequisites

Microsoft apps knowledge and general knowledge of computer operations

Advanced Preparation

We recommend you log in to your OneDrive account before starting this session.

K2's Ten "Must Know" Features In Excel

Description

Most business professionals have used Excel for years, often without the benefit of any formal training. Thus, they don't know about key features in the application and, therefore, don't use them. Of course, this leads to inefficiencies and errors. Isn't it time to stop this madness? This session is for you if you're ready to become more efficient and effective with Excel! You will learn ten critical features that can help you get more work done in less time and improve your accuracy. We encourage you to make plans to join us for this session to learn the best ways of working with Excel!

Major Topics

- Best practices for working with large volumes of data
- How to securely and efficiently collaborate with others
- Using Excel for optimization scenarios
- Creating "audit trails" in Excel
- Define "dynamic arrays" and list examples of their benefits

Learning Objectives

- List at least three primary features associated with Power Query
- Identify the steps necessary to utilize modern collaboration options in Excel
- Cite examples of the benefits related to using dynamic arrays
- Differentiate between Solver and Scenario Manager as optimization tools
- Identify at least three benefits of protecting your data with Sensitivity Labels

Who Should Attend

Accounting and financial professionals seeking to improve their efficiency and effectiveness when working with Excel

Program Level

Intermediate

Field Of Study

Computer Software & Applications

CPE Credit Hours

2

Prerequisites

Basic knowledge of Microsoft Office Excel

Advanced Preparation

None