



2014  
Edition

# Conference Catalog

In collaboration with



Executive Education, Inc.  
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*Lively, Informative & Fun!*

# Indiana CPA Society

## Controllers Conference

March 20, 2013

### General Sessions

8:30 – 9:20 AM

#### **Protecting Our Stakeholders: Ethics and Financial Stewardship**

Dan Chenoweth, MBA, CPA, Chenoweth & Associates, Loveland, CO

9:25 – 10:15 AM

#### **Preparing for a CFO Role**

Donna Sylver, MBA, CPA, Sylver, CPA PLLC

Networking Break: 10:15 – 10:30 AM

### Breakout Sessions

10:30 – 12:10

#### **A. MS Word Can Make You a Better Writer**

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc., Chelsea, MI

#### **Metrics Management: Improve Your Budgeting and Control**

Dan Chenoweth, MBA, CPA, Chenoweth & Associates, Loveland, CO

Conference Luncheon: 12:10 – 1 PM

1:00 – 2:40 PM

#### **A. The CFOs Role in Banking and Financing**

Donna Sylver, MBA, CPA, Sylver, CPA PLLC

#### **B. Pricing for Profitability: Why Cost Matters**

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc., Chelsea, MI

Break: 2:40 PM – 2:50 PM

2:50 PM – 4:30 PM

#### **A. Understanding Business Risk**

Dan Chenoweth, MBA, CPA, Chenoweth & Associates, Loveland, CO

#### **B. Know Your Cost: Double Your Profit**

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc., Chelsea, MI

Adjourn: 4:30 PM

*Looks great! I wish all of my conferences could be planned this swiftly 😊*

– A State Society CPE Director



# *Nancy Knows.....*

## *Dear Friends,*

Need top-notch speakers for your industry or controller's conference? We can provide:

- Dozens of different 50 or 100 minute breakout sessions of interest to corporate financial managers in these categories:
  - Ethics
  - Management
  - Management accounting and finance
  - Technology
  - Communications
- Multiple sessions presented by the same speaker or multiple speakers
- Breakfast or lunch keynote speakers
- Keynote speaker who can also present breakout sessions on additional topics

With the depth and breadth of experience on our team, we have the capability to provide ALL of the speakers for your Controllers or Industry Conference.

This catalog will tell you about the many topics we can present.

## *Nancy*

Nancy J Daly, **BS, MBA**, is Executive Education's Client Service Manager and is responsible for association needs. You can contact Nancy through any of the following means:

**E-Mail:** Nancy@ExecutiveEducationInc.com

**Office:** 734-475-0600

**Mobile:** 734-223-6699

**Home:** 734-475-6660

# Your Association Critical Skills Conference

Anytime in 2014

General Sessions			
8:00 - 8:50 AM	<b>Financial Management – 10 Tips for Success, 13 Signs of Failure</b> William F. O'Brien, MBA, CPA, Santa Clara University		
8:55 – 9:45 AM	<b>Prepare for a CFO Role</b> John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.		
9:45 – 10:00 AM	<b>Networking Break</b>		
Breakout Sessions			
	Communication	Ethics	Management
10:00 - 11:40 AM	<b>MS Word Can Make You a Better Writer</b>  John L. Daly MBA, CPA, CMA, CPIM  Executive Education, Inc.	<b>Ethics in The Real World</b>  Dan Chenoweth MBA, CPA  Chenoweth & Assoc.	<b>Critical Thinking Skills</b>  Diane D. White MBA, CPA, CMA  Workforce Resource, LLC.
11:40 – 12:30 PM	<b>Conference Luncheon</b>		
12:30 – 2:10 PM	<b>Credibility: The What and the How</b>  William F. O'Brien MBA, CPA  Santa Clara University	<b>Resolving Ethical Conflicts</b>  John L. Daly, MBA, CPA, CMA, CPIM  Executive Education, Inc.	<b>Managing Change</b>  Dan Chenoweth MBA, CPA  Chenoweth & Assoc.
2:10 – 2:20 PM	<b>Break</b>		
2:20 – 4:00 PM	<b>Presentation Skills for Success</b>  Dan Chenoweth MBA, CPA  Chenoweth & Assoc.	<b>Workplace Ethics and Civility</b>  Diane D. White MBA, CPA, CMA  Workforce Resource, LLC	<b>Risk Analysis &amp; Management</b>  William F. O'Brien MBA, CPA  Santa Clara University

# Your Association Thriving in a Changing World Conference

Anytime in 2014

General Sessions			
8:00 - 8:50 AM	<b>Risk Management: What Every Financial Manager Must Know</b> William F. O'Brien, MBA, CPA, Santa Clara University		
8:55 – 9:45 AM	<b>Finance and Innovation: Reinvent Your Company</b> John F. Levy, MBA, CPA, Board Advisory		
9:45 – 10:00 AM	<b>Networking Break</b>		
Breakout Sessions			
	Accounting	Ethics	Management
10:00 - 11:40 AM	<b>Driving Performance with Metrics</b> John L. Daly, MBA, CPA, CMA, CPIM Executive Education, Inc.	<b>Ethics and Our Profession</b> Dan Chenoweth MBA, CPA Chenoweth & Assoc.	<b>Achieving Strategic Success: Your Personal PIT Crew</b> William F. O'Brien MBA, CPA Santa Clara University
11:40 – 12:30 PM	<b>Conference Luncheon</b>		
12:30 – 2:10 PM	<b>The Changing Landscape of Private Company Accounting</b> William F. O'Brien MBA, CPA Santa Clara University	<b>Ethics and Sustainability</b> John F. Levy MBA, CPA Board Advisory	<b>Lean Accounting</b> John L. Daly, MBA, CPA, CMA, CPIM Executive Education, Inc.
2:10 – 2:20 PM	<b>Break</b>		
2:20 – 4:00 PM	<b>Pricing for Profitability: Why Cost Matters</b> John L. Daly, MBA, CPA, CMA, CPIM Executive Education, Inc.	<b>Ethics of Risk Management</b> Dan Chenoweth MBA, CPA Chenoweth & Assoc.	<b>Lessons from the Playing Field: What Sports Can Teach Accountants</b> John F. Levy MBA, CPA Board Advisory



# Conference Speakers



Dan Chenoweth, **MBA, CPA**, helps clients take their strategy to the bottom line through rigorous project management and change management techniques. He has held executive level positions in general management, accounting and finance in a number of industries including telecommunications, printing and publishing, heavy equipment manufacturing, and apparel manufacturing. Dan lives in Loveland, Colorado and is a former Colorado Society of CPAs board member.



John L. Daly, **MBA, CPA, CMA, CPIM**, is a Chelsea, Michigan-based management consultant specializing in costing, pricing strategy and pricing model development. He has taught continuing professional education courses since 1995. Earlier in his career, John was Chief Financial Officer for a Tier 1 automotive parts supplier, CFO for a large restaurant chain and COO for a window treatments manufacturer and retailing chain. He is the author of ***Pricing for Profitability***, published by Wiley & Sons, Inc.



John H. Higgins, **CPA, CITP**, is a founder of CPA Crossings, LLC, a technology education and consulting firm. John has a passion for helping financial professionals achieve success by leveraging technology. He has facilitated hundreds of sessions to develop technology-enhanced solutions. ***The CPA Practice Advisor*** named John one of the 25 thought leaders in the accounting profession. He is a past chairman of the Michigan Association of CPAs and is a member of the AICPA Business and Industry Hall of Fame.



Jay Giannantonio, **MS, CPA, CIA**, is a management consultant specializing in finance transformation, internal audit, risk management, process improvement and Sarbanes-Oxley compliance issues. His professional experience includes long stays at Verizon/Bell Atlantic and KPMG Consulting in a professional career that began in 1980. Most recently, he was VP – Internal Audit for a \$1B commercial equipment rental and sales company. Jay lives in the Philadelphia area.



**John F. Levy, MBA, CPA**, is the CEO of Board Advisory, a consulting firm that assists public companies, or companies aspiring to be public, with corporate governance, compliance, financial reporting and financial strategies. He has served as CFO of both public and private companies. Mr. Levy currently serves on the Board of Directors of four public companies, including as Chairman of one company and lead director of another. He is a graduate of the Wharton School of Business at the University of Pennsylvania.



**Don Minges, MBA**, is a fractional CFO who worked in diverse industries at various development stages. He has experience in profitability enhancement, strategic planning, venture capital, mergers & acquisitions, consulting, turnarounds, economic forecasting, cost accounting and financial analysis. Don has experience raising equity for several growing firms and has invested equity capital into promising businesses. He has served on the Board of Directors for many firms. He graduated with highest honors from the Fuqua School of Business at Duke.



**William F. O'Brien, MBA, CPA**, is a financial management consultant and educator with over 40 years of experience. He has held senior financial management positions with Intel and ROLM and served as CFO for several emerging high technology companies. Bill has extensive experience in corporate planning, control, financial analysis, cash management and managerial accounting in both domestic and international settings. He is on the faculties of Santa Clara University and San Jose State University.



**Bryan L. Smith, CPA, CITP, CISA**, is a founder of CPA Crossings, LLC, a technology education and consulting firm. Bryan's expertise includes in-depth knowledge of paperless workflow solutions, the impact of technology on internal controls, strategic IT infrastructure design and information security best practices. Bryan is a member of the AICPA CITP Credential Committee and is Past Chair of the Michigan Association of CPAs Information Technology Committee



**Donna Sylver, MBA, CPA**, has held 3 CFO roles and various other financial leadership positions during her 25+ year career. Her broad range of industry experience consists of manufacturing, banking, consulting, healthcare, software, hazardous waste, and communications. Named one of the 25 *Most Powerful Women in Banking* by U.S. Banker in 2005, Sylver currently serves on the board of trustees of North Carolina Wesleyan College and is the managing partner of Sylver CPA, PLLC.



**Diane D. White, MBA, CPA, CMA**, is a Beaufort, SC -based finance and accounting consultant with expertise in for-profit and non-profit entities. Diane is presently CFO for Workforce Resource, a nationwide technology service provider to the mortgage finance industry, a role she has occupied since WFR's founding in 2008. She previously held senior finance and control positions with Freddie Mac and Wachovia Corporation and served as CFO for trade association, student lending, and educational services non-profits.

*Loved the stories – lots of good practical advice*

– Fargo, ND

*Right balance of presentation and humor. Best presenter at the conference.*

– Atlanta, GA

*Likely the best presenter I've heard at any MACPA conference. I will try to attend every one of his sessions.*

– Novi, MI

*Really enjoyed Donna – Great speaker!*

– Carmel, IN

*John explained the concepts in a very understandable fashion. Other IT presentations go right over my head.*



# Conference Topics

Here are **SOME** of the topics our speakers could present at your conference.

## 10 Steps to a Digital Office in the Cloud

**John H. Higgins, CPA, CITP, CPA Crossings, LLC** or  
**Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**



Unless you have been living under a rock, you have been inundated with marketing messages about the "cloud." This session is where the rubber meets the road in regards to cloud computing. Come learn what it means to go digital and the role cloud computing plays. This session is a must attend to make sure you are on the right path to embrace the new IT paradigm.

## Achieving Strategic Success: Your Personal P-I-T Crew

**William F. O'Brien, MBA, CPA, Santa Clara University**



Turning strategic goals into reality is as easy as 1-2-3. Learn about the three tools that can turn aspirations into achievement. Leave this interactive and entertaining session with the insight for transforming your financial team into your company's catalyst for strategic success.

The three tools are Strategic Planning (P-Planning), Performance Based Management (I-Initiation) and Balanced Scorecard Reporting (T-Tracking). Discuss how to use these tools effectively as you race to achieve strategic success.

This course will be useful for both CPAs in industry and public practice. The P-I-T Crew can make your department a winning team in either environment. Let's spend some time together and get ready, as legendary Alabama football coach Paul "Bear" Bryant would say, to "Make something happen!"

## B Corporations and L3Cs: New Corporate Forms for Responsible Businesses

**Diane D. White, MBA, CPA, CMA, Workforce Resource, LLC**



Social entrepreneurship is part of a fast-emerging global trend towards business practices that prioritize societal and environmental good as well as shareholder or investor benefit. In America, a dozen or more states have endorsed new hybrid business forms like B Corporations and L3Cs. It may not be long now before these and other new corporate forms for responsible business conduct become the norm rather than the exception. Attend this session to learn why social entrepreneurship could become the dominant 21<sup>st</sup> century business model and what B-Corps and L3Cs offer that traditional Corporations and LLCs do not.

## Better Performance Plans: The Microeconomics of Motivating Your Team

**Diane D. White, MBA, CPA, CMA, Workforce Resource, LLC**



New

Behavioral economics is an emerging field of study using elements of economics and psychology to enrich and expand conventional organizational theory. It explains why human behavior in real-life business situations can appear puzzling when viewed solely through the traditional “carrot and stick” management theories, taught to generations of MBA students.

For instance, many businesses suffer adverse effects from compensation and incentive programs that should have worked for the benefit of all, but didn't. However, if evaluated through the lens of behavioral economics, inconsistent and even damaging employee responses to apparently well-structured compensation incentive programs are not a mystery. This session introduces and applies concepts like anchor points, the endowment effect, the status quo effect, the ultimatum game, and more to help financial professionals spot or prevent weak links in employee incentive programs.

## Black Swans: Prepare for the Unexpected

**Dan Chenoweth, MBA, CPA, Chenoweth & Associates** or  
**Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.** or  
**John F. Levy, MBA, CPA, Board Advisory**



New

Did you ever hear the phrase, “What you don't know can hurt you”? Nassim Nicholas Taleb, in his book *The Black Swan*, postulates that it is exactly what we don't know that can hurt us the most. The risks we need to be most concerned about are the risks we cannot identify or predict. Taleb terms these risks as “Black Swans”. In this session we will describe some historical black swan events and, more importantly, discuss how accountants and their organizations can be prepared for a future we cannot even envision.

## The Civil Advantage: Workplace Ethics and Civility

**Diane D. White, MBA, CPA, CMA, Workforce Resource, LLC**

Ethics and civility are powerfully connected. What we call “manners” are behaviors with proven value as leadership tools to avoid destructive acts and build trust. People treasure their personal dignity, have amazingly long memories for personal slights, and thrive when treated with respect. Rudeness, blustering, and bullying may win the occasional battle, but always lose the war when it comes to lasting prestige and power. Moreover, ethical lapses are more likely to happen if leaders do not use a civil approach to foster cooperation. This session explains how civility and ethics reinforce one another and offers 25 rules to foster considerate conduct in the workplace.

## Communicating Financial Information to Non-Accountants

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**



Do you ever get blank looks when you present your company's financial statements? Does your board nod knowingly after your presentation, but never seems to have any meaningful questions? It could be that they have no idea what you are talking about and are just pretending to understand! Learn how to connect with your CEO, board, fellow managers, and other employees so they understand your message. Learn to motivate them to action. Come hear a veteran CFO tell you how.

## The Continuing IFRS Journey: Update on an Uncertain Future

**William F. O'Brien, MBA, CPA, Santa Clara University** or  
**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**

Conversion from U.S. GAAP to International Financial Reporting Standards (IFRS) is a given reality for public companies and select private companies with public accountability. The key issues involve when it will occur and how to make it happen! This session will discuss possible IFRS adoption scenarios, the key business issues concerning financial managers, tips for getting prepared now and how to keep the adoption momentum going.

## Convergence and Private Company Accounting: More Changes on the Financial Reporting Horizon

**William F. O'Brien, MBA, CPA, Santa Clara University**

In the next year, accounting in the United States will change forever. While most financial professionals are aware of International Financial Reporting Standards' (IFRS) affect on public companies, many are not sensitive to the potential changes resulting from FASB's convergence project and the impact of proposed accounting standards for non-public companies. This session focuses on how convergence will affect YOU. You cannot afford to miss this critical, entertaining and interactive session.

## Corporate Finance Check-up: Renovate Your Analytical Toolbox

**William F. O'Brien, MBA, CPA, Santa Clara University**

Understanding corporate finance is a skill that separates those who will become Chief Financial Officers from those who will always remain accountants. This session provides a refresher on corporate finance skills for those who work, or aspire to work, at the CFO level. This session reviews internal financial analysis skills, takes a fresh look at performance measurement techniques, how to use forecasts as a valuation tool and how to build proactive banking relationships.

## COSO Update – Changing Risk Management Standards

**Dan Chenoweth, MBA, CPA, Chenoweth & Associates**



COSO provides the accounting profession's definitive standards on risk management. The 2013 update focuses on finding the "sweet spot" between insufficient and excessive business risk taking to maximize enterprise value. Unlike other accounting professional pronouncements, such as FASB or tax updates, the COSO guidelines are in plain English and provide a strong foundation for assessing and mitigating risk.

COSO constantly updates the risk management standard based on ever-changing business dynamics. The latest standards help organizations design and implement internal controls, addressing both operational and compliance objectives. Following these guidelines does not guarantee you will never have risks but does increase the probability you will anticipate and mitigate risks before they occur. COSO recommends organizations transition their existing control evaluations, tools and documentation to the updated 2013 framework as soon as feasible. This session shows you how.

## Creating Competitive Advantage: Developing a Roadmap for Sustainable Performance

**Dan Chenoweth, MBA, CPA, Chenoweth & Associates**

One of leadership's primary responsibilities is to develop a strategy defining their company's unique and valuable position in the marketplace that provides a competitive advantage. While we would all agree strategic planning is a critical element for organizational success, strategic planning today is a paradox. On the one hand, we should make detailed strategic plans with a horizon of a decade or more. On the other hand, organizations must be adaptable. What happens when break-through technology, new emerging competitors or global competition change the rules of the game? How well does your company recognize these changes and adapt to determine a new action plan? This session provides you with the ideas, skills and confidence to more proactively develop your organization's strategic plan.

## Creating the Best Projections You Can

**John F. Levy, MBA, CPA, Board Advisory**

All we really know is the past but all that really matters is the future. How can you take the historical knowledge you have about your company, its performance, your competitors, your industry and the economy to help your company plan for the future? In this session, John Levy will examine current budgeting and forecasting best practices as well as the critical roles of strategic planning and risk management in developing best projections. He looks at the many uses of projections from cash management to compensation.

## Effective Change Management

**Dan Chenoweth, MBA, CPA,- Chenoweth & Associates** or  
**Diane D. White, MBA, CPA, CMA, Workforce Resource**

Research shows that far too many change initiatives fail to launch properly or endure because their leaders do not understand the psychological basics of human response to change. Inept change management techniques can cause long-lasting damage or unintended consequences for individuals or organizations. If you have ever observed the negative results of participating in a failed change initiative that logically should have been an easy dunk -- or want to avoid an unnecessarily bad experience -- this session may open your eyes to new awareness and tools for effective change leadership.

## Ethics in the Real World: Power, Influence and Ethics

**Dan Chenoweth, MBA, CPA, Chenoweth & Associates**

A sense of belonging is one of our basic human needs. This basic human need can work against us. The CEO and other senior executives may exert their power and influence on the financial manager for unethical, even fraudulent, purposes in order to "make the numbers." This session identifies the four sources of leadership power and the six primary ways people in authority positions can influence other's behavior. The session concludes with a discussion of how financial managers can defend themselves against these influences when executives ask us to take unethical actions.

## The Ethics of Risk Management

**Dan Chenoweth, MBA, CPA, Chenoweth & Associates**

Taking unreasonable risks with your shareholder's money is clearly unethical. On the other hand, taking no business risks at all may irresponsibly waste your company's resources. Today's enterprise risk management and internal control standards define what management teams must do to evaluate and manage risks. This session examines risk management's ethical issues with the goal of keeping your name off newspaper front pages.

## Excel – Improving Your Spreadsheet Presentation

**John H. Higgins, CPA, CITP, CPA Crossings, LLC** or  
**Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**



New

This intermediate Excel presentation will provide an overview of all the functionality supporting formatting and printing spreadsheets in Excel and how to create spreadsheets that are visually appealing and understandable to a non-financial audience through the use of cell styles and conditional formatting. Topics reviewed include: printing multiple spreadsheets, embedding Excel ranges into Word documents, cell formatting, custom cell styles, conditional formatting options, Page Layout tab, print dialogue options, and converting spreadsheets to PDF.



## Financial Analysis in a Metrics Driven World

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**

At one time, financial analysis consisted of comparing one financial statement number to another. Today's financial analysis is more sophisticated; often performed at the individual responsibility center level using metrics integrating both financial and non-financial information. This session will cover:

- Why knowing how to measure output is the first step in financial analysis today
- Why information "cleansing" is key to understanding your real situation
- How to tell which business activities are performing or underperforming
- What financial metrics every company should use

Make sure your analysis tools are up to date!

## Financial Statement Shenanigans: Prevent Them from Fooling You!

**Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.**



Senior management yearns to report positive news and impressive financial results that will please investors, bankers and drive value higher. While most companies act ethically and follow prescribed accounting rules, some take advantage of gray areas in the rules or ignore them altogether in order to portray their financial results in a misleading way.

This session will discuss some common financial statement shenanigans to help prevent them from fooling you.

## Five Business Books in 100 Minutes

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**

You know you should read some business books, but finding time is often hard to do. Come hear popular speaker, John L. Daly, talk about five business books, including his own. This session makes it easy to catch up with the latest thinking in five different areas of business. John changes the mix all the time. Recent sessions have discussed ***Great By Choice, How the Mighty Fall, Lean Thinking, Crucial Conversations, The Non-Designer's Design Book, Snakes in Suits: When Psychopaths Go to Work*** and ***Pricing for Profitability***. Save some time and hear about five business books in 100 minutes.

*This guy was absolutely fantastic. Down to earth, sincere, gave great and understandable examples. Relaxed, approachable. Materials excellent, organized.*

– Fargo, ND

## Fraud Alert! Loss Prevention and Control

**William F. O'Brien, MBA, CPA, Santa Clara University** or  
**Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.**

**Fraud Alert!** is one session you cannot afford to miss. Fraud will touch you in some manner. Prepare for the inevitable. A study by the Association of Certified Fraud Examiners estimated fraud costs the world economy in excess of \$3.5 trillion per year (the equivalent of \$4,500 per employee). This same study estimated the course of normal audits discovers only about 11% of frauds versus approximately 19% discovered by accident. This session will examine various types of frauds and discuss ways to prevent, detect and investigate these activities.

## Getting Through the Gap: Creating a Win-Win Relationship with Millennials

**William F. O'Brien, MBA, CPA, Santa Clara University**

In this turbulent world, crossing the generation gap in business situations is never easy. Some managers believe it is nearly impossible with the members of the so-called Generation Y. Find out in this informative session exactly why that does not have to be true. Learn what motivates millennials and how Baby Boomers can forge productive and mutually beneficial relationships with this important segment of our professional workforce.

## How Good Companies Become Great

**Dan Chenoweth, MBA, CPA, Chenoweth & Associates** or  
**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**

Some business writers are calling Jim Collins' books **Good to Great** and **Great by Choice** the best business books so far in the 21<sup>st</sup> Century. Well-researched and widely read, Collins' findings dispel many long-held business myths. This session will review Collins' research, compare it to other research and then discuss the implications for management teams that want to make the transition from being merely good to truly great.

## iPad – Review of Top Apps for Business Professionals

**John H. Higgins, CPA, CITP, CPA Crossings, LLC** or  
**Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**



Learn what apps are popular with business professionals including apps for: note taking, file sharing via the cloud, MS Office compatible apps, document review and annotation, remote access, printing, expense tracking and collaboration and more.

*Wonderful speaker, interesting facts!*

– Novi, MI

## Lean Accounting: Doing More With Less

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.** or  
**Dan Chenoweth, MBA, CPA, Chenoweth & Associates**

Many accounting departments generate volumes of information that is of little use to anybody. Lean Accounting begins with examining the needs of the user, focusing effort on the aspects of financial management providing real value to the company. Come hear how to improve accounting processes while reducing the amount of effort required.

## Lessons from the Playing field: What Sports Can Teach Accountants

**John F. Levy, MBA, CPA, Board Advisory**



The Duke of Wellington is credited with saying. *“The Battle of Waterloo was won on the playing-fields of Eton”*. From before the 19<sup>th</sup> Century to today, sports have molded our business and professional leaders. Sports can teach today’s accountants about many of our most critical business issues including strategy, culture, metrics, management, innovation, adversity and sustainability. This session will explore lessons we can all use from great, and not so great, moments in our professional and amateur sports. Quit feeling guilty about playing those extra nine holes or watching “March Madness” during business season. You’re learning important business and professional skills!

## Managing Your E-mail, Calendar & Contacts on Your Mobile Device

**John H. Higgins, CPA, CITP, CPA Crossings, LLC** or  
**Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**



This session will provide the steps to setup your mobile device to synchronize your e-mail, appointments calendar and contact between your e-mail service provider, PC, tablet and smartphone. Topics include: Apple iOS, Google Android, Windows 8 platforms, IMAP, POP, ActiveSync, synchronization setup, MS Exchange, Outlook, Gmail, Yahoo and more.

## Measuring and Reporting on Sustainability

**John F. Levy, MBA, CPA, Board Advisory**



Accountants are ideally suited to *measure* sustainability efforts because we collect and analyze our organizations’ information. Until sustainability efforts are adequately measured and return on sustainable investments quantified in terms of time and money, many businesses will not fully embrace sustainability efforts. Accountants should lead efforts to *report* on sustainability because we have the experience and knowledge to create clear, concise and informative documents. This session will review the challenges in measuring and reporting sustainability efforts, discuss current best

practices and provide some thoughts about the future direction of sustainability measurement and reporting.

## Microsoft Office 2013 and 365: What's New?

**John H. Higgins, CPA, CITP, CPA Crossings, LLC** or  
**Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**



This session will provide a comprehensive review and demonstration of what is new with Office 2013. You will be well prepared to decide if and when you should upgrade to 2013 and review the Office 365 offering for deploying Microsoft Office in a hybrid online/offline model. A complete review of the new features specific to each of the major office applications; Excel, Outlook, PowerPoint & Word will also be given.

## MS PowerPoint – Creating Professional Presentations to Engage Your Audience

**John H. Higgins, CPA, CITP, CPA Crossings, LLC** or  
**Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**



This basic level MS PowerPoint session will teach you the fundamentals of creating presentations that look professional and will get your message across to your audience. The focus will be on best practices for designing and creating PowerPoint presentations with a step-by-step guide for building a presentation including: understanding the PowerPoint interface, using themes and layouts, adding graphics, photos and other objects to engage the viewer, and tips and tricks for delivering your PowerPoint presentation.

## Nonprofit Boards: Stepping Up to Today's Challenges

**Diane D.White, MBA, CPA, CMA, Workforce Resource**

The days when nonprofit boards were essentially a benign supportive group are fading. Heightened expectations for corporate governance quality and visibility have changed the composition and emphasis of nonprofit boards nationwide. This session focuses on how to understand, advise and help nonprofit boards meet their critical governance responsibilities. In this session, you will:

- Become acquainted with board responsibilities, needs, and challenges
- Learn about competencies needed on nonprofit boards
- Examine the current state of nonprofits and the implications for board activities
- Find out what board members must know about serving as a board member

***Great speaker and great topic ideas made time spent very profitable experience.***

– Livonia, MI

## Performance Analysis: Identifying Profit Improvement Opportunities

**William F. O'Brien, MBA, CPA, Santa Clara University** or  
**Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.**

Discover ways to make your company more profitable! This fast-paced session will teach you how to use operational auditing and performance improvement techniques to identify and implement cost saving operating controls and processes. Based on the principles of COSO's Internal Control Framework and standards of the Institute of Internal Auditors, this session will make the experienced financial manager and the professional operational auditor more efficient and value-added in their respective fields.

## Prepare for a CFO Role

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.** or  
**Dan Chenoweth, MBA, CPA, Chenoweth & Associates**

Many accountants spend their early career trying to develop technical skills. Yet, a surprising proportion of Chief Financial Officers don't even have an accounting degree. What does it take to become a CFO and be successful once you are there? Whether you are early or late in your career, this session will provide valuable insights. Come hear stories of a real world CFO's successes and failures.

## Pricing for Profitability: Why Cost Matters

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**

Three things can happen in pricing, and two of them are bad. Overpriced products are a missed opportunity whereas underpriced products give away your products at a loss. When sales and accounting personnel fail to work together, the company risks becoming its industry's "dumb" competitor. Accountants involved in pricing can help the company understand the difference between "dog" and "gravy" opportunities with knowledge that directly translates into an improved bottom line. You will leave this session understanding why the company with the best cost information wins!

## Principled Negotiations: Getting to Yes

**John F. Levy, MBA, CPA, Board Advisory**



Every transaction between two individuals is a negotiation. According to negotiation guru Chester Karrass, *"In business as in life, you don't get what you deserve, you get what you negotiate."* Often we view negotiations as a competition with one side "winning and the other "losing". **Principled negotiation** is a better method that seeks to have both parties come out ahead. This session will examine best negotiation practices providing participants with ways to "get to yes" faster and build lasting relationships.



## Profit Improvement: Ten Tips

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.** or  
**Dan Chenoweth, MBA, CPA, Chenoweth & Associates**

When a company is having poor financial performance, the financial person is often the first to go. Whether times are good, or times are bad, asking the tough questions and making sure the organization is efficient and stays efficient are part of the financial manager's job. Proactive efforts by financial managers can prevent the need for a company to "catch up." This session provides 10 techniques for improving your company's bottom line.

## Protect Yourself: Legal Responsibilities of Directors

**John F. Levy, MBA, CPA, Board Advisory**



The first years of the 21<sup>st</sup> century have seen unprecedented changes in the roles and demands on our corporate and nonprofit directors. Board members now cope with ever-fuller agendas, greater potential liability and demands by shareholders, regulators, activists and the government. How should directors respond to these new challenges and how can they protect themselves in an increasingly litigious environment?

This seminar discusses directors' legal responsibilities with particular emphasis on the responsibilities of the Audit Committee and the Audit Committee Financial Expert.

## Resolving Ethical Conflicts

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**

At some point in his or her career, every financial manager will face a choice of doing the right thing or taking the easy way out. Skillful handling of an ethical conflict can make a big difference in the trajectory of your career.

This session discusses:

- Standards and techniques for resolving ethical conflicts
- How to have a conversation about a tough issue and still keep your job
- What to do when talking fails

This session could save your job and your career!

## Risk Analysis and Management

**Dan Chenoweth, MBA, CPA, Chenoweth & Associates** or  
**William F. O'Brien, MBA, CPA, Santa Clara University**

In this turbulent world, responsibility for risk management has fallen squarely on the shoulders of financial managers. Audit committees and external auditors are asking questions that they never asked before. We had better prepare to give them answers!

Come get insights about Enterprise Risk Management (ERM) and what standards such as the COSO ERM model say every company must do.

## Selling Your Business What You Need to Know

**John F. Levy, MBA, CPA, Board Advisory**



Baby boomer aging has created an unprecedented increase in businesses offered for sale and the number will continue to grow. In this demanding market, how do sellers get not only the best price but also the right terms and consideration? This session will examine the many reasons to sell, potential buyers, alternative forms of consideration, the structure of transactions, some legal matters, and the team needed to maximize the price and protect sellers.

## Sharpening the Saw: Why Successful Companies are Learning Organizations

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**

In many organizations, the accountant's annual 40 CPE hours represents the most learning for any group of team members. This may mean that the whole company is falling behind its competitors. Today, the greatest compliment that you can pay a company is to say it is a "learning organization." Come hear nationally recognized speaker, John L. Daly, talk about how to make continuous learning affordable and why your company must be a learning organization.

## SOS: IFRS-berg Up Ahead: Danger Beneath the Surface

**William F. O'Brien, MBA, CPA, Santa Clara University**



The adoption frenzy over International Financial Reporting Standards (IFRS) has become yesterday's news. Now is not the time to let down your guard and breathe a sigh of relief. The adoption issue is alive and fraught with political and global economic overtones.

Are we poised for another foreign financial crisis? Can we rely on financial information prepared under inconsistent reporting and auditing standards? How does the U.S. approach to IFRS relate to these questions?

Rather than sitting back and relaxing, the time for action is now. Are you prepared for the impact of change when it arrives at your door?

Both public and private companies need to know how possible IFRS adoption scenarios could affect their external reporting, contractual obligations and daily operations. While the intensity has diminished, the issue of IFRS adoption or endorsement is still very much alive. Do not fall victim to "habitual complacency"!

## Spotlight on Private Company Accounting

**William F. O'Brien, MBA, CPA, Santa Clara University**



The Financial Accounting Foundation (FAF) formed the Private Company Council (PCC) and the AICPA issued the Financial Reporting Framework for Small and Medium-sized Enterprises (FRF); attempting to simplify private company financial reporting.

Be careful! What you think you may see is not necessarily what you are going to get. Behind each alternative approaches lurks disagreement and complexity. Non-public companies must determine which approach to financial reporting is best for their stakeholders. You must evaluate many considerations such as systems, financing sources, internal staffing and professional support.

Join us as we discuss these issues and more. Learn about the potential political conflicts that could undermine the smooth implantation of these reporting models. Take time to understand the issues before you leap into the unknown!

## Take Your Writing to the Next Level: MS Word Can Make You a Better Communicator

**John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc. or  
Diane D. White, MBA, CPA, CMA, Workforce Resource**

Learn how MS Word can provide feedback to improve your writing significantly. You'll learn how to evaluate your writing, eliminate passive sentences, use Word's styles features to create a professional "look", make your sentences more readable and automatically index your documents.

## Taking Excel to the Next Level for Experienced Users

**John H. Higgins, CPA, CITP, CPA Crossings, LLC  
Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**



This intermediate Excel session will demonstrate Excel features and functions that can be used to analyze and report on financial information. You will master the most effective techniques to visually impact your spreadsheet data and collaborate electronically. Topics include: conditional formatting, Share WorkBook, annotation tools, macros and more.

## The Trustworthy Leader: Ethics and Trust

**Diane D. White, MBA, CPA, CMA, Workforce Resource**

Betrayals of trust can destroy not only careers, but also whole organizations and lives. This is why TRUST is the top prerequisite for principled, effective leadership. People will do nearly anything for a leader they trust and will resist or sabotage a leader they consider untrustworthy. Trustworthy business leaders do not simply assume they are

trusted or expect that authority and power can take the place of earned trust. They know research shows that leaders who continually work to earn and keep authentic trust throughout an organization will reap enormous payback in all aspects of doing business. How do they do it? This session addresses the most important concepts and tips for building and maintaining trust and integrity in business culture and practices.

## Twelve Attributes of Adaptive Cultures

**Dan Chenoweth, MBA, CPA, Chenoweth & Associates**



Prior success does not necessary equate to future success. However, many companies try to live in a world that no longer exists. Kodak is a recent example. Kodak invented digital photography but was slow to convert their old film-based business model to this new technology, eventually declaring bankruptcy.

Time and again companies cling to the past too long, even when faced with strong evidence that their old ways no longer work. Organizations must be adaptable, constantly scanning the external environment to determine when it is necessary to change products and then seamlessly make the change. This session will define the concept of “organizational culture,” discuss the strengths and weaknesses of having a strong culture, and conclude by discussing the twelve attributes of adaptive cultures.

## Using the iPad and the Cloud to Manage Your Documents on the Go

**John H. Higgins, CPA, CITP, CPA Crossings, LLC** or  
**Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**



This session will explain and demonstrate how to use your iPad and cloud storage services to implement a mobile document / file management system. You will also learn how to master the applications used for note taking and viewing documents.

## Working with Your Board and Audit Committee

**John F. Levy, MBA, CPA, Board Advisory**

The relationship between the CFO, the Board of Directors and the Audit Committee has changed forever. The Board is looking to the CFO and the finance and accounting department for more – more integrity, more honesty, more information and more strategic analysis. How do you meet these challenges? Your Board and Audit Committee are now better qualified and more independent. How do you tap into the knowledge and experience of your audit committee members? Veteran director and public company CFO John F. Levy will tell you how to communicate effectively with your Board and Audit Committee and how to use them as competitive assets.

*Really engaging, great stuff!*

– Novi, MI



## Executive Education, Inc.

**3855 Queen Oaks Drive**  
**Chelsea, Michigan 48118-9703**  
Phone: (734) 475-0600  
FAX: (734) 475-7145

### **For Further Information Contact:**

**Nancy J. Daly**  
Client Service Manager

**E-Mail: [Nancy@ExecutiveEducationInc.com](mailto:Nancy@ExecutiveEducationInc.com)**



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