2016 Conference Catalog

Executive Education, Inc.
(734) 475-0600
www.ExecutiveEducationInc.com

Lively, Informative & Fun!
Kansas Society of CPAs  
Business and Industry Conference  
October 23, 2014

General Sessions

8:00 - 8:50 AM  
Sharpening the Saw: Why Successful Companies are Learning Organizations  
John L. Daly, MBA, CPA, CMA, CPIM, Chelsea, MI

8:55 – 9:45 AM  
Twelve Attributes of Adaptive Cultures  
Dan Chenoweth, MBA, CPA, Loveland, CO

9:45 – 10:00 AM  
Networking Break

Breakout Sessions

10:00 – 11:40 AM  
A. Principled Negotiations: Getting to Yes  
Don Minges, MBA, DLM Financial Consulting, Charlotte, NC

B. Resolving Ethical Conflicts  
John L. Daly, MBA, CPA, CMA, CPIM

11:40 – 12:30 PM  
Conference Lunch

12:30 – 2:10 PM  
A. How Good Companies Become Great  
Dan Chenoweth, MBA, CPA

B. Black Swans: Prepare for the Unexpected  
Don Minges, MBA

2:10 PM – 2:20 PM  
Break

2:20 PM – 4:00 PM  
A. Communicating Financial Information to Non-Accountants  
John L. Daly, MBA, CPA, CMA, CPIM

B. Lean Accounting  
Dan Chenoweth, MBA, CPA

4:00 PM  
Adjourn
Dear Friends,

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

- Dozens of different 50 or 100 minute topics 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 speakers 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 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:

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**Office:** 734-475-0600  
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**Home:** 734-475-6660
# Sample Agenda
## Critical Skills Conference
### Anytime in 2016

### General Sessions

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>8:00 - 8:50 AM</td>
<td>Financial Management – 10 Tips for Success, 13 Signs of Failure&lt;br&gt;William F. O’Brien, MBA, CPA, San Jose State University</td>
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<tr>
<td>8:55 – 9:45 AM</td>
<td>Prepare for a CFO Role&lt;br&gt;John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.</td>
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### Breakout Sessions

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<td>Communicate Financial information to Non-Accountants&lt;br&gt;John L. Daly&lt;br&gt;MBA, CPA, CMA, CPIM&lt;br&gt;Executive Education, Inc.</td>
<td>Ethics in the Real World&lt;br&gt;Dan Chenoweth&lt;br&gt;MBA, CPA&lt;br&gt;Chenoweth &amp; Assoc.</td>
<td>Excel: Become a Formula Expert&lt;br&gt;John Higgins&lt;br&gt;CPA, CITP&lt;br&gt;CPA Crossings, Inc.</td>
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<tr>
<td>11:40 – 12:30 PM</td>
<td>Conference Luncheon</td>
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<td>12:30 – 2:10 PM</td>
<td>Fraud Alert! Loss Prevention and Control&lt;br&gt;William F. O’Brien&lt;br&gt;MBA, CPA&lt;br&gt;San Jose State University</td>
<td>Ethics in Action: Protect and Defend&lt;br&gt;Dan Chenoweth&lt;br&gt;MBA, CPA&lt;br&gt;Chenoweth &amp; Assoc.</td>
<td>Spotlight on Technology Tools&lt;br&gt;John Higgins&lt;br&gt;CPA, CITP&lt;br&gt;CPA Crossings, Inc.</td>
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Conference Speakers

Virgie M. Ammerman, MBA, CPA, CITP, is CEO/President of 180 Medical Billing Services and teaches at Spring Arbor University. She has held financial leadership positions in both industry and public accounting for the past 20 years. Virgie serves on the Board of Directors for the Michigan Association of CPAs, as the Chair of the Controller’s Task Force and as a member of the Michigan Comeback Task Force. Virgie is the Past Foundation Chair and Past Treasurer of the Portage Rotary club.

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 former chief financial officer who has worked with manufacturing, health care, hospitality, wholesale and retail businesses, spending the longest part of his career as the CFO of a Tier 1 automotive parts supplier. He has lead continuing professional education seminars since 1995 and does costing and pricing consulting. He is author of the book, Pricing for Profitability, published by Wiley & Sons, Inc.

John H. Higgins, CPA, CITP, is the co-founder of CPA Crossings, LLC. John serves as a strategic technology advisor to CPAs in the planning and deployment of effective technology solutions and workflow automation. In 2015, John established CPA Crossings’ new Cloud Accounting Learning Center a knowledgebase of training, information and consulting services designed to help CPAs make the transformation to delivering client accounting services through the cloud.
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. 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 firm that assists public companies, or companies aspiring to be public, with corporate governance, compliance, financial reporting and financial strategies. He has nine years experience with three large public accounting firms and served as CFO of both public and private companies. John currently is on the boards of three public companies and three non-profits, serving as Chairman of one company and audit committee chair of another. He graduated from the University of Pennsylvania’s Wharton School of Business.

Don Minges, MBA, is a fractional CFO who works in diverse industries at various development stages. His expertise is 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 experience. He 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 a faculty member at San Jose State University.
Patrick Stroh, MBA, CMA is president of Mercury Business Advisors in Minneapolis, MN. He serves on the board of directors of the Institute of Management Accountants and the ERM COSO Advisory Board. He is a former Chief Strategy & Innovation officer for UnitedHealth Group. Mr. Stroh is the author of Business Strategy: Plan, Execute, Win! published by Wiley, and Advancing Innovation; Galvanizing, Enabling & Measuring for Innovation Value! available October 2015. During a sabbatical, Patrick became a classically trained chef at Le Cordon Bleu!

Bryan L. Smith, CPA.CITP, CISA, serves as a virtual CIO to CPA firms and professional organizations. He specializes in the planning and deployment of effective technology solutions. As co-founder of CPA Crossings, Bryan focuses on helping firm leaders understand the issues and opportunities associated with deploying information technology to improve productivity, enhance client services and increase profitability.

Donna Sylver, MBA, CPA, has held 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 is currently the managing partner of Sylver CPA, PLLC.

Diane D. White, MBA, CPA, CMA, is a Beaufort, SC-based consultant with 40 years of for-profit and non-profit business and finance leadership experience. Her executive roles include SVP / Controller, Wachovia Information Services Corp.; SVP / Controller, VP/ISS Controller, Freddie Mac Information Services; CFO, Futures Industry Association (nonprofit); and CFO, Workforce Resource, LLC, a nationwide residential mortgage financial services provider she helped start up in 2008. Diane recently retired from Workforce Resource to more fully enjoy Low country life with her husband Jim.
Conference Topics

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

Achieving Strategic Success: Your Personal P-I-T Crew
William F. O’Brien, MBA, CPA, San Jose State University

Turning strategic goals into reality is as easy as 1-2-3. Learn about the three tools that can turn aspirations into achievement: 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 session will be useful for both financial managers in industry and public practice; the P-I-T Crew can make your department a winning team in either environment. Leave this interactive and entertaining session with the insight for transforming your financial team into your company’s catalyst for strategic success.

B Corporations and L3Cs: New Corporate Forms for Responsible Businesses
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.
John F. Levy, MBA, CPA, Board Advisory

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. A dozen or more states now endorse new, hybrid business forms like B Corporations and L3Cs. It may not be long 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 21st century business model and what B-Corps and L3Cs offer that traditional Corporations and LLCs do not.

John Levy is an excellent speaker/presenter….His knowledge on the topic is top-notch, he uses business examples that are relevant and his humor is refreshing.

This guy was absolutely fantastic. Down to earth, sincere, gave great and understandable examples. Relaxed, approachable. Materials excellent, organized.
Better Performance Plans: The Microeconomics of Motivating Your Team
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Behavioral economics is an emerging discipline that uses 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 through traditional “carrot and stick” management theories taught to generations of MBA students.

Behavioral economics knowledge, dispel the mystery of negative employee responses to apparently well-structured compensation incentive programs. 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 and prevent weak links in performance management and employee incentive programs.

Beyond Traditional Budgeting: Use Performance Metrics to Improve Financial Planning and Control
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
John F. Levy, MBA, CPA, Board Advisory

Many financial managers wage a constant struggle to keep their projections current and keep their operating managers engaged and focused on their budgets. This session will show you how to use performance metrics to reduce forecasting work and improve financial control and manager engagement in your department’s numbers.

Black Swans: Prepare for the Unexpected
Dan Chenoweth, MBA, CPA, Chenoweth & Associates
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.
John F. Levy, MBA, CPA, Board Advisory

Did you ever hear the phrase, “What you don’t know can’t 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 calls these risks “Black Swans”. This session will discuss some historical black swan events and, more importantly, discuss how financial professionals and their organizations can prepare for a future we cannot even envision.

Very good speaker/discussion leader. I really appreciate that you guys provide topics that are on point for industry professionals. Keep it up!!!

-Greenville, SC
The Business Secrets of Trappist Monks
Don Minges, MBA, DLM Financial Consulting

"The Business Secrets of the Trappist Monks," by August Turak, has been an unconventional business best seller. What makes the Trappist Monks successful? The short answer is the monks have discovered an amazing secret: “It is in our own self-interest to forget our self-interest.” Just like every business, a Trappist monastery must be self-sufficient. Trappists are world famous for many products, from cheese to wool to, most famously, beer. If they do not sell their goods, they do not eat. The Trappists have learned the hard-way many lessons that are effective for every business; honing their business skills for 350 years. We discuss key lessons applicable to any business.

Business Strategy & Leadership; Plan, Execute, Win!
By Patrick Stroh, MBA, CMA, Mercury Business Advisors

Business strategy and leadership are inextricably linked. Strategy must be more than an annual process that produces a shelf-ready five-year plan in a three-ring binder. Strategy and leadership are wasted efforts without execution. Planning without execution is hallucination.

This webcast will provide valuable insight regardless of industry, business maturity, or current business volatility into how to lead strategy development and execution in your own organization.

Cash Management Strategies
Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC

Cash management skills are timeless and never go out of style. This session shares strategies to get financing as well as tips and tricks to manage cash in the short and medium term. Building credibility with your bank by demonstrating a strong understanding of your cash flow needs makes you an excellent spokesperson for your business.

The CFO’s Role in New Product Development

Successful product development involves many people. Sales, marketing, product design, operations, finance and many other activities must work together to turn new ideas into reality. Finance provides a vital role in separating commercially promising ideas from those that are not worth the investment.

This session discusses about how to tie product development strategies to capital planning and operational decision making, along with customer feedback and overall marketing and value proposition strategies. This can provide valuable insights on how to effectively and efficiently create new value for your customers and guide your business investment and operating decisions!
The Civil Advantage: Workplace Ethics and Civility
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

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 will always lose the war when it comes to lasting prestige and power. Moreover, ethical lapses are more likely 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.

Closing Best Practices: Shorten Month-End
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Surveys show that the average North American company completes its monthly financial statement closing in five days. However, some companies are able to close their books in one day or less. Many financial managers who feel pressured to shorten financial statement preparation time struggle with the balance between accuracy and speed. This session will focus on how to provide financial information faster, better and more cheaply.

Cloud Systems - How Do I Know My Data is Secure?
John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

The #1 question CPAs ask when it comes to cloud based software applications is "Is it secure?" There is no simple answer. You need to invest time to conduct due diligence on the particular offering to make sure the service provider’s integrity and data security satisfies you. This session will focus on the key steps you should take when performing due diligence review of a particular cloud application.

Communicating Financial Information to Non-Accountants
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

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 team members so they understand your message. Learn to motivate them to action. Come hear a veteran CFO tell you how.
Communication Skills for Financial Managers
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

This session will teach you how to speak and listen so that you and your employees get it right the first time. This presentation assists you in integrating the following skills into your communication repertoire: assertive versus aggressive statements, effective body language, open-ended questions, paraphrasing, empathy, and artfully ending a conversation.

Corporate Finance Check-up: Renovate Your Analytical Toolbox
William F. O'Brien, MBA, CPA, San Jose State 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 and takes a fresh look at performance measurement techniques. We will also discuss how to use forecasts as a valuation tool and how to build proactive banking relationships.

Corporate Finance: Valuing a Business
Don Minges, MBA, The Numbers Guy
William F. O'Brien, MBA, CPA, San Jose State University

This session discusses various business valuation methods whether for a start-up, spin-off or acquisition at any stage. Many valuation methods exist. Which method is right? Which is the 'best' for a given business? Program content includes crucial topics such as: the absolute single best metric, the Cost of Capital, the capital asset pricing model and Weighted Average Cost of Capital (WACC), Valuation methodologies (income, asset and market approaches), Discounted Cash Flow (DCF) and many more. CPAs and Corporate Financial Managers can’t afford to miss this course.

COSO Update: Changing Risk Management Standards
Dan Chenoweth, MBA, CPA, Chenoweth & Associates
Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

COSO provides the accounting profession’s definitive risk management standards which it continues to update and refine. The COSO guidelines provide a strong foundation for assessing and mitigating risk. The latest standards help organizations design and implement internal controls, addressing both operational and compliance objectives. Following the guidelines does not guarantee you will never have risks, but it does increase the probability you will anticipate and mitigate risks before they occur. COSO recommends organizations quickly transition their control evaluations, tools and documentation to the latest frameworks. 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 in order to provide a competitive advantage. 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? This session examines current budgeting and forecasting best practices, as well as the critical roles of strategic planning and risk management, in developing projections. We look at the many uses of projections from cash management to compensation.

Crowd Funding: What Every Financial Manager Should Know  
Don Minges, MBA, Executive Education, Inc.  

The internet provides several new ways to raise money. These methods, called crowd funding, allow organizations to raise money through donations, pre-sales, debt and equity, often from large numbers of people. Crowd funding is getting easier due to emerging regulations the JOBS act provides. While not appropriate for all organizations, crowd funding has no shortage of success stories. However, risks, advantages, disadvantages and costs exist. This session provides a crowd funding overview for finance professionals who want to learn about this new financing method, including key considerations for each crowd funding type.

Culture Risk – Candor’s Link to Performance  
Dan Chenoweth, MBA, CPA, Chenoweth & Associates  

Trust is the foundation for long-term business success and candor is the language of leaders who choose to be trustworthy. Candor is communication free from dishonesty or deceit. Candor is critical to building trust. The Rittenhouse Rankings, measure executive candor for 100 top U.S. companies. Her methods predicted the collapse of both Enron and Lehman Brothers. She correlates candor rankings with market performance, revealing the leadership integrity, alignment with the corporate culture, and investor confidence. In this session, learn how the Rittenhouse model works.
Data Analysis and Management
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC

Studying financial results can tell us what business activities need improvement, but often leaves little insight into how to improve. To improve our organization’s bottom line, we must learn ways to increase revenue or decrease cost. This comes from gaining new insights about customers, products and processes. Learn more about how to gather and interpret non-financial data.

Driving Performance with Metrics
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Do you struggle to keep budgets current in the face of an ever-changing business climate? Do you recognize that last year’s actual spending can be far from what a department’s spending should be? Twenty-first century performance metrics reduce work, reduce politics, provide flexibility and substantially improve the performance management process. This valuable session will show how to drive organizational performance using these powerful techniques.

Double Your Impact & Cut Your Writing Time in Half
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

American businesses report losing $1 billion a year to unclear writing that wastes time, kills contracts and turns off customers. Optimize your time spent in communications as a writer and a reader. Prevent your readers from sending your documents to the circular file because they are too much work to decipher. Write with clear purpose and enjoy the results and time saved. Be part of the solution, not part of the problem – learn to write it right the first time.

Effective Change Management
Dan Chenoweth, MBA, CPA, Chenoweth & Associates
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Research shows that far too many change initiatives fail to launch properly or endure because their leaders do not understand the psychology of human response to change. Inept change management can cause long-lasting damage or unintended consequences for individuals and organizations. If you have ever observed the negative results of participating in a failed change initiative or if you want to avoid an unnecessarily bad experience -- this session may open your eyes. Gain a new awareness of how change affects people and the tools you need to lead change effectively.

Very dynamic. Kept me engaged during entire presentation. Very relevant examples.

- Minneapolis, MN
**Ethics in Action: Protect and Defend**  
Dan Chenoweth, MBA, CPA, Chenoweth & Associates  

In the 1976 movie, *Network*, Peter Finch play a news anchor played who so upset with world events that he delivers a TV speech with the famous line “I’m mad as hell and I’m not going to take it anymore.” These days when we learn of foolish business decisions leading to a crisis, many financial professionals feel the same way. However, in recent years we see case after case of short-term profits trumping long-term organizational safety and sustainability. This session explains how financial professionals can help protect and defend our organizations and clients from self-inflicted disasters.

**Ethics in the Real World: Power, Influence & Ethics**  
Dan Chenoweth, MBA, CPA, Chenoweth & Associates  
John F. Levy, MBA, CPA, Board Advisory  

A sense of belonging is one of our basic human needs; unfortunately, it is one that can work against us. The CEO and other senior executives may exert their power and influence on financial management 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. It concludes with how financial managers can defend themselves when executives ask us to take unethical actions.

**The Ethics of Risk Management**  
Dan Chenoweth, MBA, CPA, Chenoweth & Associates  
John F. Levy, MBA, CPA, Board Advisory  

Taking unreasonable risks with your shareholder’s money is clearly unethical. On the other hand, taking no risk 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 the front page.

**Excel - Become an Formula Expert**  
John H. Higgins, CPA.CITP, CPA Crossings, LLC  
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC  

Did you know that Excel 2010 has 402 functions and Excel 2013 has 453 functions? Did you know there are 12 different function categories? Did you know you could create your own functions? This fast-paced course will demystify some of the most useful Excel functions and show you how best to use them including a review of best practices for building formulas.
Excel - Charts and Formatting For a Non-Financial Audience
John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

You know the old saying "A picture is worth a thousand words." This session shows you how to use Excel’s charting and formatting features to present financial data to a non-financial audience. We explore Excel’s many capabilities to get your point across without showing rows and columns of data. Help your audience visualize the meaning of trends, exceptions, distributions or a good/bad outcome.

Excel - Everything You Need to Know About Pivot Tables
John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

This intermediate Excel session provides an overview of using pivot tables to analyze data. The session uses practical examples to demonstrate pivot tables value data analysis. Topics reviewed in this course include pivot table advantages, creating pivot tables, connecting to external databases, and pivot table charts.

Finance and Innovation: Reinvent Your Department and You Company
John F. Levy, MBA, CPA, Board Advisory

How can so many great companies lose their way and fall into a steep decline or even disappear? Once very successful and profitable companies are now a ghost of their former glory or names we can barely remember. This explores how companies succeed through innovation and fail because they are unable to deal with the next wave of innovation. More importantly, we will discuss how you, your department and your organization can profit from being more innovative.

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 and bankers while driving value higher. Though 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 financial results in a misleading way. This session will discuss some common financial statement shenanigans to help prevent them from fooling you.

John Daly was excellent! I hope he will be returning next year.
Atlanta, GA, SC
Find Your Strengths
Virgie Ammerman, MBA, CPA, CITP, 180 Medical Billing Services, LLC
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Gone are the days of personality testing geared to ‘fix’ our weaknesses. Welcome to the art of capitalizing your strengths and improving your career and the careers of those around you! This session, will help you identify your strengths and embrace them. We will also help you identify strengths in others and use this information to build stronger teams designed to problem solve and build forward momentum!

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, Pricing for Profitability and Snakes in Suits: When Psychopaths Go to Work. Save time, learn the meat and bones of five popular business books in just 100 minutes.

The Five Dysfunctions of a Team
Don Minges, MBA, DLM Financial Consulting

What are the issues and symptoms of poor performing teams? How do we correct the root causes and what can we do to improve performance? This session discusses The Five Dysfunctions of a Team by Patrick Lencioni and will allow you to recognize when a workgroup is not living up to its full potential.

Fraud Alert! Loss Prevention and Control
William F. O’Brien, MBA, CPA, San Jose State University
Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Fraud Alert! is one session you cannot afford to miss. Fraud will affect 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.

Jay did an excellent job in presenting and discussing this material. He also contributed several points from his personal experience, which added to the appreciation of the subject matter.
**Galvanizing, Enabling, and Measuring Innovation**  
*By Patrick Stroh, MBA, CMA, Mercury Business Advisors*

Finance is charged with aligning the organization’s strategic and financial goals. This session discusses innovation and what you as a leader must do to galvanize, enable and measure for innovation value your organization. We will discuss multiple “channels” for innovation and their ability to drive business value.

Innovation attempts can be “flavor of the month” programs unless we tie them to existing business strategies and processes, such as the capital budgeting process.

**Generations at Work: Finding Common Ground**  
*Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC*  
*William F. O’Brien, MBA, CPA, San Jose State University*

The dynamics of today’s workforce ARE changing. Gone are the days when managers spent years working their way up the company’s ladder. Because of the relatively small population of Generation Xers, leadership is transitioning many management positions from Baby Boomers to Millennials. The result is a greater age difference between colleagues.

This session explores the differences between the generations who make up the current workforce and the implications, both positive and negative, of the gap. We will explain why finding common ground is crucial to survival, and how to accomplish it. Receive practical tips and tricks to manage multiple generations in our work places.

**Getting the Most from Your Information Systems**  
*John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.*  
*Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC*  
*Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.*

Are your information systems working for you, or are you working for your information systems? Your information systems can make your job go smoothly or make your life miserable. In which world would you rather work?

This session provides insights into selecting, installing and using information systems. Even if new software is not in your future, this session will give you insights into improving your current systems, making them far easier to use.

_A great presenter. I have now seen four of John Daly’s presentations and I would go to another tomorrow if allowed._

- Atlanta, GA, SC
Nonprofit funding often involves securing and tracking grant funds. Whether you participate in developing nonprofit grant proposals or are part of the review process, this session will bring you up to speed on the “What and How” of successful grant writing. Learn the four stages of grant writing, tips for more effective grant proposals and how to avoid the most common grant proposal mistakes.

Leaders provide the culture, environment, values and incentives that foster and encourage change. Most importantly, great leaders create environments of trust that allow employees to challenge, innovate and work as teams. In a rapidly changing world, heartfelt leaders build great organizations. Understand the qualities of a great leader and find out how you can become a great and heartfelt leader no matter your title or place in an organization.

Some business writers are calling Jim Collins’ books *Good to Great* and *Great by Choice* the best business books so far in the 21st 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 discuss the implications for management teams that want to transition from being merely good to truly great.

The volume, momentum and complexity of change today have no precedent in human history. Resilience is the key to success when individuals and organizations face unexpected change. This presentation defines the term “resilience” and discusses the characteristics of resilient people. A “resilience continuum” self-assessment then provides the foundation for discussion about how anyone can learn to become more resilient.

Presenters were very good. They were able to hold the group’s attention, even in more technical areas of the discussion.

Indianapolis, IN
Improve Teamwork
Don Minges, MBA, The Numbers Guy

Teamwork is something that every leader wants, but not necessarily something that comes easily. Learn how to set and communicate goals that motivate your team. Find out how to get members to work for the greater good rather than their own personal goals. Seamlessly manage both the team and its individual members. Popular speaker Don Minges tells how you can get your team working toward the same goals.

KPI Dashboards - The New Financial Reporting Model
John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Today’s truly hot application is KPI (Key Performance Indicator) dashboards. CEOs, entrepreneurs and management professionals are all clamoring for real time financial dashboards, and cloud-based accounting systems are one of the primary drivers of this dynamic financial reporting model.

This session will introduce you to numerous platforms for developing KPI dashboards: cloud accounting systems, Microsoft Excel and niche applications. We will show you how you can embrace this model for your organization or clients.

Leaders Eat Last
Don Minges, MBA, DLM Financial Consulting

Trust is essential, because without trust, there can be no teamwork. Trust is like oxygen, when it is gone - we suffocate. This session provides a 15-step action plan to gain commitment from your team members, build trust, hold each person accountable and create results for your organization.

Leadership and Teamwork
Don Minges, MBA, DLM Financial Consulting

What are the key duties and attributes of a true leader? What should a good leader do to improve teamwork? Learn how leading effectively will improve your whole department’s performance.

Lean Accounting: Doing More With Less
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Many accounting departments generate volumes of information that are of little use to anyone. Lean Accounting begins with examining user needs and focusing effort on the financial management activities that provide real value to the organization. Come hear how to improve accounting processes while reducing 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 19th Century to today, sports have molded our business and professional leaders. Sports can teach today’s accountants about many critical business issues, including strategy, culture, metrics, management, innovation, adversity and sustainability. This session explores lessons we can all use from great, and not so great, moments in sports. Quit feeling guilty about playing those extra nine holes or watching “March Madness” – you are learning important professional skills!

Management Continuity Risk: Build a Team to Sustain Your Business
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Many organizations wait too long to begin to think about succession and devote too little effort to building a strong management team. Loss of key personnel can present a huge risk. Talent management is the key to effective strategy execution and is the foundation for organization continuity. Learn why building a sustainable team is an important part of your organization’s risk management efforts!

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 we can adequately measure sustainability efforts and their returns in terms of time and money, many businesses will not fully embrace sustainability. Accountants should lead efforts to report on sustainability because we have the experience and knowledge to create clear, concise and informative documents. This session reviews the challenges in measuring and reporting sustainability efforts, discusses current best practices and provides thoughts about the future of sustainability measurement and reporting.

Great presentation and useful for current day’s business environment.

Kansas City, KS
Microsoft Office 365 - What You Should Know
John H. Higgins, CPA.CITP, CPA Crossings LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings LLC

Microsoft delivers Office 365 in a relatively new bundle of software and services on a subscription basis. The value proposition can be compelling and is driving small, mid-size and large organizations in transition to this model. This session provides you with all the information you need to assess whether Office 365 is right for your organization.

Microsoft OneNote: Get Your Notes Organized
John H. Higgins, CPA.CITP, CPA Crossings LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings LLC

Are you finding it difficult to keep all your notes organized? If you are someone who keeps notes all over the place, with some hand-written, others in e-mail, and still more in various Word or Excel documents, Microsoft’s OneNote application may be the best solution for you. OneNote is a very practical note taking and management application that works on your Windows PC, Android or iDevice. Continuously synchronize your notes across all devices for access when and where you need them. This session gives a tour of OneNote and shows you how this app can help you pull it all together.

MS Word: Advanced Features
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Financial professionals are often Excel experts, but are unaware of MS Word tools that can save time and make their written communications considerably more professional looking and easier to read. This session covers tools you have probably never used and others you may not be using correctly. Your whole department could use this course!

Nonprofit Boards: Step Up to Today's Challenges
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.
John F. Levy, MBA, CPA, Board Advisory

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. 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
Outlook - Beyond Email: What You May Be Missing
John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Chances are you use Outlook every day to process email, but have you ever taken the time to truly explore all of Outlook’s other features. This session shows you the other tools "beyond e-mail" that Outlook provides. You will learn numerous tips, tricks and techniques for managing your calendar, contact information and communications, to do list tracking, notes management and more.

Performance Analysis: Identifying Profit Improvement Opportunities
William F. O’Brien, MBA, CPA, San Jose State University
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.

I really enjoyed the process improvement sessions by Bill. I think more avenues like this are good for these sessions/conferences.

Power and Influence: Getting It Done With Integrity
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Clumsy attempts at influence melt faster than ice cream on a summer day. Whether or not you have formal authority, learn to wield the power of your position in a meaningful way to get things done constructively. Identify the strengths that will help you build personal power and significant influence at work. Know the risks and consequences of misusing power and influence, and find out why “winning” so often really means losing.

Get comfortable with the dynamics and ethical application of power and influence, while you adopt proven techniques to help your voice be heard and impact results.

Diane did a great job at keeping the audience engaged and making the topic interesting.
**Powerful Presentation Skills**
Dan Chenoweth, MBA, CPA, Chenoweth & Associates
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

This session will provide you with the essentials of how to prepare and deliver a dynamic presentation that will not only engage your audience but also enable them to remember your key points. This presentation uses a combination of lecture, discussion and group activities to provide you with a quick, practical approach to organize your key points and format your visuals for maximum impact. It also covers the basics of effective delivery such as body language, vocals, and word choice.

**Prepare for a CFO Role**
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Dan Chenoweth, MBA, CPA, Chenoweth & Associates
Donna Sylver, MBA, CPA, Sylver & Associates

Many accountants spend their early career trying to develop technical skills, yet a surprising proportion of public company Chief Financial Officers don’t even have an accounting degree. What does it take to become a CFO and be successful once you get 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 profitability. 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

According to negotiation guru Chester Karrass, “In business as in life, you don’t get what you deserve, you get what you negotiate.” Every transaction between two individuals is a negotiation. 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.

Very informative presentation and engaging.

- Kansas City, KS
Private Company Accounting: More Changes on the Financial Reporting Horizon
William F. O’Brien, MBA, CPA, San Jose State University

Accounting in the United States has changed forever. While most financial professionals are aware of International Financial Reporting Standards’ (IFRS) effect on public companies, many are not sensitive to the numerous accounting standard choices available to private companies. This session focuses on how these choices will affect YOU. You cannot afford to miss this critical, entertaining and interactive session.

Profit Improvement: Ten Tips
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Dan Chenoweth, MBA, CPA, Chenoweth & Associates
Don Minges, MBA, Executive Education, Inc.

When a company experiences poor financial performance, the financial person is often the first to go. Whether times are good or 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 management can prevent the need 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 21st century’s first years 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 increasing demands by shareholders, regulators, activists and the government. How should directors respond to these new challenges, and how can they protect themselves in a progressively litigious environment? This session discusses directors’ legal responsibilities, with particular emphasis on audit committee and the audit committee financial expert responsibilities.

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 the choice of doing the right thing or taking the easy way out. Skillful handling of an ethical conflict can make a big difference in your career’s trajectory.

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
William F. O’Brien, MBA, CPA, San Jose State University

In this turbulent world, risk management responsibility has fallen squarely on financial management’s shoulders. Audit committees and external auditors are asking questions they never asked before. We must prepare to give them answers! Come get insights about Enterprise Risk Management (ERM) and what standards such as the COSO ERM model say every organization must do.

The Rittenhouse Rankings: Cut Through Financial Reporting’s FOG
Dan Chenoweth, MBA, CPA, Chenoweth & Associates
John F. Levy, MBA, CPA, Board Advisory

Is that financial report you are reading honest and candid, or are the real facts hidden among carefully chosen “weasel words”? Learn about how the Rittenhouse model measures the integrity of management’s disclosures about financial results. Prevent misleading disclosures from fooling you.

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 this number will only 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 the whole company is falling behind its competitors. Today, the greatest compliment 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 find out why your organization must continually learn.
Shift Happens: Make Corporate Culture Work for You
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Financial Managers tend to be logical, sequential, time-bound, detail-oriented and relentless in getting things done — skills necessary to be a good project leader. Generally, we are excellent at creating “bullet proof” project plans that include time and resources estimates, success measures and the activities leading to a successful result. However, larger organizations often do not accept our wonderful project plans. In fact, some individuals either may overtly or covertly try to sabotage the effort! Why? Corporate culture is a likely culprit. In this session, we will dispel corporate culture’s mysteries and discuss how to make it work for you.

Speak So They Listen!
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

As a financial manager of the 21st century, you cannot build working relationships without effective communication! You must be able to translate abstract data into concrete language in order to drive profits and add value. Effective communication of complex ideas is crucial—not only to boards, audit committees and stakeholders—but to line managers, sales people and other team members. Most importantly, you must be able to communicate effectively with your clients and customers, or you risk the very lifeblood of your business. This session provides ideas that will help both your business and career.

Spotlight on Private Company Accounting
William F. O’Brien, MBA, CPA, San Jose State 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 see is not necessarily what you are going to get. Behind each alternative approach 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!
Spotlight on Technology Tools
Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC
John H. Higgins, CPA.CITP, CPA Crossings LLC

Technology continually changes. Are you keeping up? This session will discuss three technology issues of interest to any modern financial professional, highlighting ‘The New Big Four’ Technology Ecosystems and how they increasingly force us to choose between Microsoft, Amazon, Google and Apple technology platforms. The session also discusses the pros and cons of adopting Office 365 and reviews new and upcoming changes in technology affecting our personal and professional lives.

A lot of audience participation and thought-provoking ideas.

Staff Retention: Attract and Keep the Best People
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Does it seem like you spend far too much time recruiting? Do your people leave just as they become productive? If you think your turnover is because Millennials are different from earlier generations, you probably are not looking at the real source of your problem. Learn the changes you should make now!

The Strategic CFO: Four High-Level Skills
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Today’s CFOs have skills that go far beyond financial accounting. Come get the executive summary on four skills every CFO should have. This session gives quick overviews of the CFO’s role in strategy development, strategic cash management, strategic risk management and strategic financial communications.

Strategic Outsourcing and Supply Chain Excellence
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

A study of over 150 procurement improvement initiatives indicates that significant savings are possible: 10-12% of the total spent over a 3-4 year period. Few, if any, other activities an organization undertakes can have this same bottom line impact. Strategic outsourcing and supply chain excellence represent “low hanging fruit,” yet many organizations don’t recognize its importance or don’t know HOW to proceed. This session highlights the importance of supply chain excellence and shows participants how to do it.
Strategic Risk – The Five Signals of “Dematurity” that Could Affect Your Organization
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

“Dematurity” occurs in established industries when a host of small innovations occur in a relatively short time, re-energizing and rejuvenating even mature industries. This session discusses the five signals of “dematurity” and the ten ways to integrate change and risk into your strategy. Is your organization ready to respond?

Systemic Risk – Six Mega Trends
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

In an inter-connected, multi-polar world, potential events in one area may have global impact. This session discusses six mega-trends and how they create both hazards and opportunities for organizations.

The Trustworthy Leader: Ethics and Trust
Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Betrayals of trust can destroy careers, 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. On the other hand, they will resist or sabotage an untrustworthy leader. Trustworthy business leaders do not simply assume they are trusted or expect that authority and power can take the place of earned trust. Research shows that leaders who continually work to earn and keep authentic trust will reap enormous payback in all aspects of doing business. This session addresses the most important concepts for building and maintaining trust and integrity in business.

Time Hacks: Proven Ways to Save Time, Money and Get More for Less
Don Minges, MBA, Executive Education, Inc.

Are you in a rush? Behind at the office? Have too many emails in your inbox? If you are trying to catch up, or just want some free time to relax – this session is perfect for you. We will share dozens of proven techniques, tricks and tips that can immediately save you time, trouble and money. Prepare to take lots of notes!
Twelve Attributes of Adaptive Cultures
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Prior success does not necessarily equate to future success and many companies try to live in a world that no longer exists. Time and again, companies cling too long to the past, 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.

When Worlds Collide: Integrating Financial and Cultural Due Diligence in Mergers and Acquisitions
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Research indicates that 55%-77% of mergers and acquisitions fail in their original intended purpose because of “culture clash” between the merging parties. Learn how to identify cultural issues up front as part of financial due diligence, develop an action plan to overcome potential areas of conflict and add far greater value to the entire due diligence process.

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 explain how to communicate effectively with your Board and Audit Committee and how to use them as competitive assets.
Here’s What Participants Have to Say

The collection of topics and the speakers were outstanding. Their subject matter thorough, presentation skills sharp, one of the more enjoyable/valuable CPE days.

-Indianapolis, IN

Wonderful speaker, interesting facts!

Novi, MI

Very helpful tips and information that can be used daily.

-Kansas City, KS

Wide variety of interesting topics. Good value.

-Indianapolis, IN

Loved the stories – lots of good practical advice.

-Fargo, ND

He was excellent! One of the best conference speakers I’ve heard.

-Portland, OR

He really involved the audience so it kept your attention.

-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

I found this session interesting. Speaker…kept my interest for the entire session.

-Atlanta, GA

Topics of sessions blended well together.

-Indianapolis, IN

Executive Education, Inc. has a number of interesting topics and has excellent presenters.

-West Columbia, SC

Content was spot on and useful in actual work performance.

-Charlotte, NC

The instructor was simply outstanding as was the course. I would highly recommend it to others and will look for other courses by this instructor.

-Indianapolis, IN

Excellent and captivating presenter with tremendous relevant and practical senior management experience.

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