



In collaboration with

CPA Crossings
Simplifying technology to help CPAs succeed

2017 Conference Catalog

Lively, Informative & Fun!

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

Indiana Society of CPAs Business and Industry Conference March 24, 2016

8:30-9:30 a.m.

General Session

Credibility and You: 20 Tips for Success

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

9:30 – 9:40 a.m.

Networking Break

Breakout Sessions

9:40-11:20 a.m.

A. Systemic Risks – The Six Megatrends

Dan Chenoweth, CPA, MBA, Chenoweth & Associates

B. KPI Dashboards – The New Financial Reporting Model

John Higgins, CPA.CITP, CPA Crossings, LLC

11:20 a.m. – Noon

Conference Luncheon

Noon - 1:30 p.m.

A. Action Makes a Difference!

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

B. Creating Competitive Advantage: Developing a Roadmap for Sustainable Performance

Dan Chenoweth, CPA, MBA, Chenoweth & Associates

1:30 – 1:45 p.m.

Networking Break

1:45 – 3:25 p.m.

A. Excel – Financial, Statistics and Math

John Higgins, CPA.CITP, CPA Crossings, LLC

B. Making Reporting Really Count

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

3:35 – 4:25 p.m.

General Session

Ethics in Action: Protect and Defend

Dan Chenoweth, CPA, MBA, Chenoweth & Associates

4:25 p.m. Adjourn



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 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
- Multi-speaker panel discussions on a current financial management topic
- 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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Sample Agenda

Critical Skills Conference

Anytime in 2017

General Sessions			
8:00 - 8:50 AM	Panel Discussion – Most Important Skills for Financial Professionals in the Next Decade John L. Daly, John Higgins, Don Minges & William F. O'Brien,		
8:55 – 9:45 AM	Introvert Power: Why Quiet Leaders are Successful Don Minges, MBA, Executive Education, Inc.		
9:45 – 10:00 AM	Networking Break		
Breakout Sessions			
	Management	A&A	Technology
10:00 - 11:40 AM	Communicate Financial information to Non-Accountants John L. Daly MBA, CPA, CMA, CPIM Executive Education, Inc.	Private Company Accounting William F. O'Brien MBA, CPA San Jose State University	Excel: Become a Formula Expert John Higgins CPA.CITP CPA Crossings, Inc.
11:40 – 12:30 PM	Conference Luncheon		
12:30 – 2:10 PM	Fraud Alert! Loss Prevention and Control William F. O'Brien MBA, CPA San Jose State University	Crowd Funding Don Minges MBA Executive Education, Inc.	Spotlight on Technology Tools John Higgins CPA.CITP CPA Crossings, Inc.
2:10 – 2:20 PM	Break		
2:20 – 4:00 PM	Prepare for a CFO Role John L. Daly MBA, CPA, CMA, CPIM Executive Education, Inc.	Valuing a Business Don Minges MBA Executive Education, Inc.	KPI Dashboards: The New Financial Reporting Model John Higgins, CPA.CITP CPA Crossings, Inc.

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.



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.



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 Boca Raton, FL.



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 knowledge-base of training, information and consulting services designed to help CPAs make the transformation to delivering client accounting services through the cloud.



Bud Kulesza, CMA CFM is former CFO of ITT Automotive, a multi-billion dollar global company, Chairman of ITT Industries Canada and a respected leader of the accounting profession as a former Chair of the Institute of Management Accountants. Bud brings a wealth of knowledge and an entertaining high-energy style to all of his endeavors. From the boardroom to the podium from the shop floor to the classroom, his direct approach to addressing issues combining knowledge, experience and humor you will not soon forget.



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 Mercier, Ph.D., MBA, CPA, CMA, CGMA is a veteran Controller, Treasurer, CFO and board member who has worked for a Fortune 500 company, a large nonprofit and several medium-sized private companies. His industry experience includes agrichemicals, biotechnology, manufacturing, printing and public accounting. He has also served as an adjunct accounting, finance and tax professor at three different universities. Don lives in Colorado Springs, CO.



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. Patrick 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, Donna 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

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.

Becoming a Great Predictor: Create Better Forecasts



John F. Levy, MBA, CPA, Board Advisory

Imagine being able to see into the future with confidence. The ability to be a great forecaster is not innate but learned. By examining great forecasters, we can learn to improve our ability to predict the future. We will examine best practices and current research to improve our ability to predict events that will affect our business.

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

- A State Society CPE Director

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” theories taught to generations of MBAs. Behavioral economics dispels 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 spot and prevent weak links in performance management and employee incentive programs.

Beyond Traditional Budgeting: Reduce Work and Improve 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 their department’s numbers.

Big Data and Data Analytics - What They Are All About

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC



Unless you have been living under a rock, you have probably heard the terms ‘big data’ and ‘data analytics’ tossed around quite a bit lately. This is because they are the hottest trends in information analysis. For CPAs, the ability to unleash the power of big data and data analytics provides an unprecedented opportunity to enhance their market value.

The data analytics tools are getting easier to use and more powerful. CPAs are in a prime position to be the go to professionals to help businesses use data analytics to make better business decisions. This course provides a primer on what it is all about and how to leverage it.

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

Black Swans: Prepare for the Unexpected

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.

Business Lessons from the Dance Floor: Leadership Secrets from Fred and Ginger



Don Minges, MBA, The Numbers Guy CFO, LLC

Every one of us can improve our leadership skills. This session discusses timeless leadership lessons learned from a seemingly unusual place - the dance floor. The parallels between business and dancing are striking; you need good partners, you must cooperate, someone must lead, someone must follow, you need to practice, you may step on someone else’s toes, and the leader does not have to be attractive. This session examines what made Fred Astaire and Ginger Rogers, two of the most famous dancers in the world, so successful. These leadership lessons from the dance floor can help you be a more effective leader. Learn many timeless leadership lessons that successful businesses employ every day.

The Business Secrets of Trappist Monks

Don Minges, MBA, The Numbers Guy CFO, LLC

"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.

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

- Iowa City, IA

Business Strategy & Leadership: Plan, Execute, Win!

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.



New

This session 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.



New

The CFO's Role in New Product Development

Patrick Stroh, MBA, CMA, Mercury Business Advisors

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.



New

This session discusses 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.

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 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.

Contemporary Cost Concepts: Understanding Activity-Based Costing

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

Companies with poor cost information make bad decisions about products that are not "average". Companies with poor cost information allocate too much cost to easy high-volume products and far too little cost to difficult low-volume products. Activity-based costing provides common-sense techniques to understand the differences. You can take this information directly to the bottom line!

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

- Kansas City, MO

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, Executive Education, Inc.

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 session.

COSO Update: Changing Risk Management Standards

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

John L. Daly, MBA, CPA, CMA, CPIM, 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.

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

- Fargo, ND

Creating Great Projections and Budgets



John F. Levy, MBA, CPA, Board Advisory

Like going to the dentist or running on a treadmill, we know our organization's budgeting process is good for us even though most of us dread the process. However, if we truly understand why budgeting is so important, it becomes both easier and less terrifying. This session will examine budgeting pitfalls, ways to avoid budget traps look at ways to improve the budgeting process through better measurement and reporting.

Creating Better Budgets

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.

Creating Equity Compensation Plans



Don Minges, MBA, The Numbers Guy CFO, LLC

In today's business world, there is a war for talent and the organizations with the best talent will win. There is a clear need to motivate and compensate talented personnel. Equity compensation plans are useful to retain, reward and recruit. Whether the business is large or a small start-up, developing an effective equity compensation plan is a challenge. Virtually every company that implements an equity compensation plan changes it immediately afterwards because it did not function as intended, making the most valuable employees upset, and achieving the opposite of the intended results. This session will discuss the numerous plan considerations. By planning and preparing in advance, you can create an effective equity compensation plan to help retain the key personnel who will lead your business to continued success.

Critical Thinking for Financial Professionals

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

What were they thinking? Why do business leaders sometimes make horrible decisions that severely damage themselves and their organizations? It is tempting to assume that a poor choice must be due to a leader's incompetence, inexperience, bad character, or low intelligence – but such easily attributed factors generally aren't the true cause when leaders blunder. In such situations, many turn to finance and accounting professionals for evaluation, answers, remedies, and solutions for improved future decision-making.

Crowd Funding: What Every CFO Should Know

Don Minges, MBA, The Numbers Guy CFO, LLC

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.

Cybersecurity - Email Threats and Protection

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC



New

The average email user's lack of knowledge leads to gaps that cyber attackers can penetrate. They use social engineering to get us to give them access to our private information.

This session will make you aware of attackers' email schemes so you can use good judgement to prevent becoming their victim. This session will improve your knowledge base in order to change your e-mail-related behavior.

Cybersecurity - Protecting Your PC & Mobile Devices

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC



New

Most security experts will tell you it isn't a matter of 'if' but a matter of 'when' a cyber thief will attack you. In order to reduce your risk of attack or at least the damage of the attack, you must learn how to protect your devices.

This session will help you become more aware of security related risks to all of your devices. You will learn specific strategies that will protect you and your organization from various cyber threats. Our focus will be on protecting devices through strategies like encryption, location tracking, access control, backup, recovery, anti-malware and more. We will also discuss strategies to recover from attacks that render your device unusable.

The discussion leader was outstanding – actually one of the best.

- Indianapolis, IN

Cybersecurity - What CEOs, CFOs and Partners Should Know



John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

IT security is not simply an IT department issue. Breaches, leaks, and cybersecurity attacks impact your brand, your reputation, your employees and your customers. Executives can no longer turn a blind eye, as it is no longer a question of 'if' but 'when' – which may even be now.

With the executive in mind, this session will take an organizational look at cybersecurity to build an understanding of why you need to care about IT security and how to leverage your leadership role to build a culture of security within your organization. We will provide insights into current threats and evolving technological and operational challenges as well as offer suggestions to help you initiate improvements in your organization.

Cybersecurity - Using the Internet Safely and Securely

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

The internet is open to all, which means it is not automatically safe and secure. This session teaches you how to use this vast open world called 'the cloud' in a secure manner. We will explore a multi-level approach to securing your internet use. From browser security to authentication methods to Wi-Fi connections, you will learn what is, and is not, secure as well as techniques to ensure security. You will also learn how to securely use cloud-based storage as well as social networking services.



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.

John Daly was excellent! I hope he will be returning next year.

- Atlanta, GA

Doing More With Less

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

Do you have too much to do and not enough time to do it? Running an efficient accounting and finance functions is not rocket science, but it does require that you get the simple things right. This session covers issues that you may not have thought about that can deeply affect your financial department's operations.

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

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.

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.

- Indianapolis, IN

The Ethics of Risk Management

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 - Creating KPI Dashboards

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



Most accountants use Excel to help them make decisions about their data, but find it difficult to deal with large volumes of information. This session covers how to build robust dashboards for analyzing key metrics in Excel.

We will begin with dashboard design guidelines and then work through importing data, setting up calculated fields and columns, and creating dashboard key performance indicators (KPIs). We will also show how to make your dashboards easily understood by adding charts and eye-catching visuals using Power View.

Excel Data Analysis - Introduction to Business Intelligence (BI)

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



This session will provide a foundation for performing data analysis in Excel that many accountants have never learned despite Excel's powerful data analysis features. You will learn the basics of structuring data and its importance when it comes to data analysis. This session will also introduce you to the Excel Power BI (Business Intelligence) tools so you have a thorough understanding of when to use them.

Excel Defined Names & Tables

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



This session focuses on design techniques you should use when creating formulas. You will learn how to use Defined Names and Excel Tables as an important and fundamental part of *every* spreadsheet. These features will make your spreadsheets significantly easier to build and substantially reduce errors. Using these techniques will place you among the most advanced Excel users

Excel Formula Proofing & Auditing



John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Excel functions are an invaluable tool for building great spreadsheets. This session will focus on how to use Excel's Data Validation feature to build spreadsheets that validate your calculations and data entry accuracy. The session will also cover Excel Auditing Tools and show you techniques to cross-foot your data to ensure accuracy.

Finance and Innovation: Reinvent Your Department and Your 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 Analysis: EVA and the Altman-Z Score

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

John F. Levy, MBA, CPA, Board Advisory

Don Minges, MBA, The Numbers Guy CFO, LLC

Do you want to brush up your financial analysis skills? This session focuses on two sophisticated analysis tools – EVA and the Altman-Z Score. EVA is the most accepted financial metric used by boards to evaluate the CEO and management team.

Companies commonly use the Altman-Z Score to evaluate credit risk. Understand why these metrics might belong in your analytical toolbox.

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.

Find Your Strengths



New

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



New

Don Minges, MBA, The Numbers Guy CFO, LLC
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 get a 20-minute executive summary of five business books. This session makes it easy to catch up with the latest thinking in five very different topics. We change the mix all the time. Recent sessions have included **Leaders Eat Last**, **Zero to One**, **American Icon**, **Slide:ology**, **Brain Rules** and **Snakes in Suits: When Psychopaths Go to Work**. Save time, learn the key lessons of five business books in just 100 minutes.

The Five Dysfunctions of a Team



New

Don Minges, MBA, The Numbers Guy CFO, LLC

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.

- Indianapolis, IN

Galvanizing, Enabling, and Measuring Innovation

By Patrick Stroh, MBA, CMA, Mercury Business Advisors

New

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 innovation value in 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

New

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

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

- Minneapolis, MN

Grant Writing for Nonprofits: What You Need to Know

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

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.

Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations

John F. Levy, MBA, CPA, Board Advisory

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.

Improve Teamwork

Don Minges, MBA, Executive Education, Inc.

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.



New

Introvert Power: Why Quiet Leaders are Successful

Don Minges, MBA, The Numbers Guy CFO, LLC

Leaders were once chosen for their character but today we live in an age where loudmouthed extroverts seem to take center stage in everything, including business, politics and entertainment. While the talkative, charismatic leader makes the front page of business magazines, recent research shows that successful business leaders tend to be more reserved, pensive and sometimes outright shy. Learn why your desire to spend significant time inside your own head may be your greatest asset.



New

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

Indianapolis, IN

Keys to the Balanced Scorecard: Keep Success on Track



New

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

An introduction and overview of the Balanced Scorecard aimed at executives and financial managers who want or need to understand the principles of the Balanced Scorecard and how it works in practical terms.

Know Your Cost – Double Your Profit

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

Companies with poor cost information make bad decisions about products that are not “average”. Poor information causes companies to overprice easy, high-volume “gravy” products and underprice difficult, low-volume “dog” products. Regardless of whether your company sells goods or services, learn how to double your profit by giving the dogs to your competitor and keep the gravy for yourself

Leaders Eat Last



New

Don Minges, MBA, The Numbers Guy CFO, LLC

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



New

Don Minges, MBA, The Numbers Guy CFO, LLC

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.

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.

I really enjoyed the sports analogy as it relates to business. A completely fresh approach...John did a fantastic job of relating all of the course work to the real world. I have multiple take-aways...very thought provoking.

- Greenville, SC

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!

Making Predictions: Plan for the Future



John F. Levy, MBA, CPA, Board Advisory

We all make predictions in our personal and professional lives. We base our decisions to marry, buy a house, launch a new product or hire staff on expectations about the future. In the past few years, research into improving predictions has advanced. We will look at this research and current best practices in forecasting to help us prepare better budgets and projections.

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.

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

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.

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.

- St. Louis, MO

Powerful Presentation Skills

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.

Don Minges, MBA, The Numbers Guy CFO, LLC

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, MO

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.

Don Minges, MBA, The Numbers Guy CFO, LLC

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.

Protecting Your Company From Fraud

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

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

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

Fraud affects almost every company eventually. Insiders perpetrate most fraud, often continuing for years without detection. Most organizations change their systems after detecting a fraud. Why not consider changes now that could prevent a considerable loss. This session will provide insights which could save your organization a lot of money!

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

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

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.

The real world examples are wonderful and extremely helpful. John was very knowledgeable and was a very good presenter.

- Manchester, NH

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.

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!

The instructor was engaging and his use of "Real life" examples made the material interesting.

- Kansas City, MO

Spotlight on Technology Tools

Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, 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.

Staff Retention: Attract and Keep the Best People

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

Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC

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.

Diane D. White, MBA, CPA, CMA, 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.

Systemic Risk – Six Mega Trends

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

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.

Wonderful conference with an excellent variety of topics and enjoyable presenters.

- Iowa City, IA

A lot of audience participation and thought-provoking ideas.

- Kansas City, MO

Teamwork – Create a Cohesive Team

Don Minges, MBA, The Numbers Guy CFO, LLC

Why do some teams produce and win, while other teams fail? What do the leaders of great teams do that make the team a success? Whether you run the executive staff of a multinational company, a small department within a large organization or even if you are a team member in a team that needs improvement, we will share proven techniques to enhance teamwork. It is not complicated to build a team, but it is difficult.

Teamwork is the ultimate competitive advantage both because it is so powerful and rare. “If you could get all the people in the organization pulling in the same direction, you could dominate any industry, in any market, against any competition, at any time” says Patrick Lencioni, the author of the book, *The Five Dysfunctions of a Team*. This seminar is based on the research from this book, which is used in most business schools today.

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, The Numbers Guy CFO, LLC

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!

Twisted Ethics: Dealing with Snakes in Suits



New

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

Good people believe everyone else is just like them. They cannot imagine someone could con them or their company and have no guilt or remorse about what they have done. Lack of guilt and empathy are key traits of a psychopath. Most of us envision psychopaths to be cold-blooded serial killers who are locked away in prison. However, experts estimate that one out of 25 of corporate executives are psychopaths who may initially appear to be more normal than the rest of us. Psychopaths may present a convincing picture of virtue while helping themselves to money, status and sex, leaving a path of shattered expectations, empty wallets, and broken hearts in their wake. Learn how to recognize and deal with others who have no conscience.

Why Black Swan Risks Matter: Manage the Unforeseen

John F. Levy, MBA, CPA, Board Advisory

We can never perfectly predict the future. This session examines the risks that cause actual results to vary from our predictions. Often the greatest risks to our businesses are from risks we cannot possibly know. This session will look at both knowable and those unknown risks and discuss methods to deal with both known and unknown risks.

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.

Your Members Appreciate Taking Conferences by Executive Education, Inc.

How nice! The time flew by. Very useful material - outstanding instructor. I wish all my CPE could be like this! This was my first Executive Education experience. I'll look for these classes in the future.

- Little Rock, AR

Speakers did a superb job of keeping things interesting!!

- Indianapolis, IN

Wonderful session! Really enjoyed and learned a lot.

- Kansas City, KS

This is the type of information our industry needs!

- Atlanta, GA

This is the first controller's conference I have attended and I found it to be a great experience. It was well organized; featured knowledgeable, professional presenters; and provided a great overall learning experience. Thank you so much for offering this type of course.

- Indianapolis, IN

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.

- Troy, MI



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