



In collaboration with  
**CPA Crossings**  
Simplifying technology to help CPAs succeed

2019  
Conference  
Catalog

*Lively, Informative & Fun!*

**Executive Education, Inc.**  
(734) 475-0600  
[www.ExecutiveEducationInc.com](http://www.ExecutiveEducationInc.com)

# Indiana CPA Society

## Controllers Conference

March 22, 2018

### General Session

8:00 -8:50 AM

#### **Leaders Eat Last**

Don Minges, MBA, The Numbers Guy CFO, LLC

8:50 – 9:00 AM

Break

### Breakout Sessions

9:00 AM – 10:40 AM

#### **Becoming a Great Predictor: Create Better Forecasts**

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

#### **3 Market Analysis Priorities to Drive Profitability**

Sherre L. DeMao, CGS BizGrowth, Inc.

10:40 – 10:50 AM

Break

10:50 – 12:30 AM

#### **Introvert Power: Why Quiet Leaders are Successful**

Don Minges, MBA, The Numbers Guy CFO, LLC

#### **Driving Performance with Metrics**

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

12:30 – 1:20 PM

Lunch

1:20 – 3:00 PM

### Breakout Sessions

#### **4 Critical Factors to Create Sustainable Growth**

Sherre L. DeMao, CGS BizGrowth, Inc.

#### **Debt or Equity: Which Will Your Organization Need Next?**

Don Minges, MBA, The Numbers Guy CFO, LLC

3:00 – 3:10 PM

Break

3:10 – 4:00 PM

### Panel Discussion

#### **Most Important Skills for Financial Professionals in the Next Decade**

John L. Daly, Sherre L. DeMao & Don Minges

Adjourn: 4:00 PM



## Nancy Knows...



Dear Friends,

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

- Over 120 different 50 or 100-minute topics of interest to corporate financial managers in these categories:
  - Communications
  - Corporate Finance
  - Diversity and Inclusion
  - Ethics
  - Management
  - Management Accounting
  - Technology
- Multiple sessions presented by the same speaker
- 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

We have launched 40 new conference topics this year. 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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### Your Members Appreciate Taking Executive Education Conferences

*The course and break-out sessions were well worthwhile and very interesting and informative. The speakers and information kept me interested all day! Thank you, thank you!*

- Edison, NJ

*It was a great conference, one of the best, I will attend again next year. I left the conference knowing that I was going to use many of the ideas in the topics discussed.*

- Indianapolis, IN

# Conference Speakers



Jeanne M. Ballew, **MA**, is founder and president of Jeanne M. Ballew Training and Development, a company dedicated to honing employee communication skills. She also owns and operates Edit Prose, a company providing editing and book coaching services to both fiction and nonfiction writers. She has trained over 25,000 people in areas such as business writing, assertive communication, presentation skills, listening skills, meeting facilitation and diversity.



Tim Cordes, **JD**, is an attorney who focuses on family law and probate administration. He is the current Secretary/Treasurer and a founding member of the LGBTQA Law Section of the State Bar of Michigan. Tim has been a member of the Stonewall Bar Association of Michigan since 2008, and served as President of the group from 2011 through 2014. As a straight ally, Tim seeks to be an advocate for the LGBT community on the issues of marriage equality and discrimination. He lives with his wife, Dana, in Bloomfield Township, Michigan.



Gary Cokins, **MBA, CPIM** is an internationally recognized author and speaker. He spent 30 years working with the consulting practices of Deloitte, KPMG, EDS and SAS. Gary has a BS in Industrial Engineering from Cornell University and an MBA from Northwestern University's Kellogg School of Management. His most recent books are ***Performance Management: Integrating Strategy Execution, Methodologies, Risk, and Analytics*** and ***Predictive Business Analytics*** published by Wiley and Sons.

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

- A State Society CPE Director



**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 led continuing professional education seminars since 1995 and does costing and pricing consulting. John authored the book ***Pricing for Profitability***, published by Wiley & Sons, Inc.



**Sherre L. DeMao, CGS**, is the founder and CEO of BizGrowth, Inc., a full-service operational, marketing and strategy consulting firm that specializes in working with entrepreneurial enterprises. She is the author of ***Me, Myself & Inc.***, a book that encourages readers to shift from the guilt-ridden Work/Life Balance mindset to a more effective Life Synergy approach to working and being. Her *Me, Myself & Inc.* concept is also featured in the university textbook, ***Smart Start-Up Management***. Her next book, ***The Profitability Quotient***, is expected to be released globally in 2018.



**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.



**Paul R. Harrison, MBA, CPA, CFP®** is a veteran financial professional with industry experience in securities, financial planning, and software. Today, he teaches accounting at the University of Denver and has a CPA practice focusing on financial accounting, tax, fraud prevention and ethical management. Paul has an MBA from the University of Colorado and lives in Denver.



**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.



**Richard A. Karwic, MBA**, is a management consultant with over 40 years of financial and managerial experience. In addition to fifteen years of broad-based management consulting, he has over 15 years of experience as Chief Financial Officer for several businesses in a wide variety of industries. He has worked in over 100 businesses, including several divisions of well-known, Fortune 500 companies. Richard lives in Wethersfield, CT.



**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, you will not soon forget his direct approach to addressing issues combining knowledge, experience and humor.



**John F. Levy, MBA, CPA**, is the CEO of Board Advisory, a consulting firm that assists public companies, or companies aspiring to be public, with corporate governance, compliance, financial reporting and financial strategies. He has nine years' experience with three large, national public accounting firms and has served as CFO of both public and private companies. John currently serves on the boards of three public companies, serving as vice chairman of one company and audit committee chair of another. He graduated from the Univ. of Pennsylvania's Wharton School of Business.



**Don Minges, MBA**, is a fractional CFO. His expertise is in profitability enhancement, strategic planning, venture capital, mergers & acquisitions, 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 has served on the faculties of Santa Clara University and San Jose State University.



**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 CFO of Raleigh-Durham International Airport.

# Accounting, Auditing, Finance & Economics

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## Accounting Fast and Slow: Thinking About Analysis

*Economics*

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

Do we really understand why we, and our companies, make the decisions? We may believe that we make decisions only after acquiring all the facts, carefully considering all the alternatives and logically choosing the best option. However, Nobel prize-winner in Economics Daniel Kahneman and his long-time collaborator Amos Tversky have proven in numerous experiments and studies that we make most decisions by intuition and not analysis. We will examine Kahneman and Tversky's groundbreaking work and its implications on us, our companies and the accounting profession.

## Accounts Receivable and Payable: "Tricks of the Trade"

*Accounting*

**Richard Karwic, MBA, Executive Education, Inc.**

The new flexible, agile accounting/finance department would be wise to review accounts receivable and payable processes. Automation has brought efficiencies, risks, and opportunities to capitalize on long time relationships and build on new ones. When was the last time you reviewed these processes and thought about ways to add value to your organization?

## Advanced Cost Accounting: Assigning Overhead

*Accounting*

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



**New**

Organizations that use primitive costing methods make predictable mistakes, allocating too much cost to easy, high-volume "gravy" products and too little cost to difficult, low-volume "dog" products. This puts the organization with inferior information at a significant disadvantage against a competitor who has a better cost model. The secret to having a great cost model is learning how to deal with overhead.

This session will show you how to assign 16 key categories of overhead. Whether you work in a wholesale, retail, health care, service or manufacturing business. Get your costing right and you will be able to give the "dogs" to your competitors and keep the "gravy" for yourself.

*This was very informative. Absolutely fantastic. I would love to see John Daly back again next year.*

Bloomington, MN

## Aligning Budgets to Strategy – The Key to Long Term Profitability

*Accounting*

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

In most organizations, strategic planning and budgeting are separate processes, making them out of alignment from their inception. This webinar explores a practical “real world” planning approach that aligns spending to long-term strategy, creates a culture of accountability and responsibility, and might actually be fun when everyone gets on board. The result will create a model for your organization’s future growth and profitability.

## Balance Sheet Management: The Least Understood Risk

*Finance*

**Don Minges, MBA, The Numbers Guy CFO, LLC**



New

Most companies manage their income statement, but many organizations virtually ignore the balance sheet until balance sheet problems create seemingly insurmountable problems. This session discusses how to analyze and manage your financial statements more holistically allowing you to identify and correct balance sheet issues early. The session will also examine several crucial ideas you can incorporate into your analyses to enhance performance and reduce risk. Every organization needs these skills!

## Becoming a Great Predictor: Create Better Forecasts

*Accounting*

**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.

## Beyond Traditional Budgeting: Reduce Work and Improve Control

*Accounting*

**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.

## Black Swans: Prepare for the Unexpected

### *Auditing*

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

## Build Your Personal Net Worth

### *Finance*

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

By the nature of our work and training, financial professionals are more sophisticated than the general population about their own personal finances. However, sometimes we spend so much time planning our company's future that we neglect or defer taking steps to build our own personal net worth. If you are dissatisfied with the speed that you are accumulating savings, this session will help put you on the right track. Even if you are meeting your goals, this session will provide insights and ideas that will add to and reinforce what you may already be doing.

## Cash Conversion Cycle: Tools & Techniques

### *Finance*

**Paul R. Harrison, MBA, CPA, CFP®**

How well do you understand your company’s cash flows? Good cash management techniques can provide a competitive advantage! This session will show you how to effectively measure and manage your cash conversion cycle. With a more complete understanding of how cash flows through your organization, you can eliminate impediments. Better cash management lowers your borrowing costs, reduces financing needs and creates financial flexibility in your company.

## The CFO’s Role in Enterprise Risk Management

### *Auditing*

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

Corporate risk management is under increasing scrutiny from auditors, regulators, and shareholders. Properly managed, an organizations risk management process embraces opportunity and avoids hazards. When risk is improperly managed, the organization's value can plummet and key executives resign in disgrace. While nominal risk management responsibility rests with the board of directors, boards increasingly turn to the CFO to lead risk management efforts. This webcast will help you take a leadership role.

## The CFO's Role in Strategic Cash Management

*Finance*

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

Businesses depend on having adequate capital and cash flow. While someone else may handle day-to-day cash management procedures, the CFO must take the lead in strategic cash management decisions. Those who can't manage cash strategically are often replaced when a company goes into a growth mode. Attend this webcast to gain insights that will allow you to function at the highest level.

## Closing Best Practices: Shorten Month-End

*Accounting*

**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

*Accounting*

**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 during 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. Come hear a veteran CFO tell you how.

## Commodity and Interest Rate Risks: Manage the Unmanageable

*Auditing*

**Don Minges, MBA, The Numbers Guy CFO, LLC**



Risk is everywhere; volatile interest rates, commodity prices, and markets. The best business leaders excel at mitigating risks, but some risks can't be tamed while others can be. How did this happen? Why is market risk increasing and happening more frequently – despite governmental regulations? What can we do to better manage interest rate risk and commodity price changes? We review why market risks are so damaging, and what we can do about them today. If risk is an issue – this session is for you!

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

*Finance*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

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

*Finance*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

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.

## Corporate Performance Management for Strategy Execution

*Accounting*

**Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC**

Poor strategy execution frustrates many executives as their organizations struggle with performance improvement, making decisions using intuition in the absence of hard data. Corporate performance management (CPM) seamlessly integrates many techniques including strategy maps and a balanced scorecard. Together they align manager and employee behavior, actions, and priorities using key performance indicators (KPIs) with specific targets to enable accountability.



*The section on business valuations presented by Don was a very good section.*

- Carmel, IN

## COSO Update: Changing Risk Management Standards



*Auditing*

**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 continue to evolve with a major 2017 revision. COSO guidelines provide a strong foundation for assessing and mitigating risk. The latest revisions help organizations design and implement risk management processes, 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.

## Cost of Capital: What is It and Why Should I Use It?

*Finance*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

Every business needs capital, and capital has a cost. Debt and equity providers demand a return and the combination is the organization's cost of capital. This session discusses how to calculate the cost of capital, how to use it to make superior business decisions every day and some common ways organizations misuse this number.

Who should understand your organization's Cost of Capital? You do! Even if you are not yet the CFO, you need to thoroughly understand the Cost of Capital and its use. Knowing the Cost of Capital allows managers to literally "Get the biggest bang for the buck." If you want to enhance your corporate finance skills, this session is for you.

## Creating Great Projections and Budgets

*Accounting*

**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.

*The presenters were excellent, and the topics were very relevant for my company / position at this time.*

Carmel, IN

## Crowd Funding: What Every CFO Should Know

*Finance*

**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 financing method, including key considerations for each crowd funding type.

## Debt or Equity - Which Will Your Organization Need Next?

*Finance*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

Your organization needs capital and there are numerous financing alternatives. How do you choose whether to raise debt or equity? What are the key considerations and the advantages of each?

This session will provide real examples and detail the process to decide between debt and equity. Why would one be a better choice today and the other be a better choice tomorrow? If you want to enhance your corporate finance skills, this session is for you.

## Develop Your Company's Scorecard: Keep Success on Track

*Accounting*

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

The business world has considered the Balanced Scorecard to be the best practice method for identifying and communicating performance information for more than twenty-five years. Still, many organizations have not yet adopted Balanced Scorecard methods. This session provides an overview of the Balanced Scorecard for executives and financial managers who need to understand how a Balanced Scorecard works in practical terms



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

Indianapolis, IN

## Driver-based Budgeting & Rolling Forecasts for Fast Analysis

*Accounting*

**Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC**



The annual budgeting process is often criticized as a fiscal exercise done by the accountants that is obsolete soon after it is published, prone to gamesmanship, cumbersome, not being volume sensitive, and disconnected from the strategy and needed risk mitigation spending. You can resolve these deficiencies using capacity-sensitive driver-based expense projections. Driver-based budgeting allows for quick scenario planning and far easier analysis of a growing organization whose future may look nothing like today. The budget can be periodically refreshed to create rolling financial forecasts extending beyond the fiscal year end. Learn how managerial accounting can become managerial economics.

## Driving Performance with Metrics

*Accounting*

**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 you how to drive organizational performance using these powerful techniques.

## Effective Management Accounting

*Accounting*

**Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC**



Critics have claimed that traditional managerial accounting is at best useless and at worst dysfunctional and misleading. Most line managers do not trust their management accounting data.

21st Century management accounting develops cost/unit metrics that are useful for budgeting, cost analysis and control. Current methods bring truly accurate fact-based costing visibility, tracing costs and identifying cause-and-effect relationships rather than broadly allocating overhead. This information provides the ability to reveal the true profit margins for products as well as for specific sales channels and customers.

Removing the barriers caused by your current management accounting techniques can provide huge rewards.

## Explaining Variances to Your Management Team

*Accounting*

**C.S. “Bud” Kulesza**, CMA, CFM, Executive Education, Inc.

Your Board, CEO and management team want answers when results do not turn out as everyone planned. The explanation may involve a complicated variance analysis that non-accountants may find difficult to understand. This session provides insight into how to explain these concepts clearly, concisely and visually so that everyone can understand and deal with the issues that challenge your organization.

## Financial Analysis: EVA and the Altman-Z Score

*Finance*

**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!

*Auditing*

**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.

## Fraud Alert! Loss Prevention and Control

*Auditing*

**William F. O’Brien**, MBA, CPA, Executive Education, Inc.

**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.

## Inventory Accounting: GAAP, Software and Variance Recognition Basics

*Accounting*

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

Need to strengthen your inventory accounting skills? This session will help you get there quickly! The session focuses on the basics: inventory GAAP, inventory software, and methods for dealing with variances. Join inventory accounting veteran John L. Daly for this informative session.

## Know Your Cost – Double Your Profit

*Accounting*

**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

## Making Predictions: Plan for the Future

*Accounting*

**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 Managing Customer Profitability: The Why & How

*Accounting*

**Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC**



The only value a company will ever create for its shareholders is the value that comes from customers – current and those acquired in the future. Customers increasingly view suppliers’ products and standard service-lines as commodities. To remain competitive, companies must determine how to retain customers longer, grow relationships profitably. They must provide differentiated services to different types of customers. These have varying costs.

Unfortunately most management accounting systems do not report customer profitability. They are restricted to only product and service line profitability reporting. Gain insights into how to shift from being product-centric to being customer-centric. Leveraging business analytics with accurate costs is essential to achieve this result.

## Measuring and Reporting on Sustainability

*Accounting*

**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.

## Pricing for Profitability: How Finance Can Save the Bottom Line

*Accounting*

**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 often vastly improved profitability. You will leave this session understanding why the company with the best cost information wins!

## Protecting Your Company From Fraud

*Auditing*

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

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

Fraud affects almost every company eventually. Insiders perpetrate most fraud, often continuing for years without detection. Most organization's 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!

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

- Fargo, ND

## Revenue Recognition and Lease Accounting: Changes Have Arrived!

*Accounting*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**



FASB has issued new standards for revenue and lease accounting that will go into effect soon. Some companies will have major revenue recognition changes. Two types of leases remain, each with their own unique accounting treatment, but the old operating lease concept has disappeared. This session will help you become prepared for the reporting changes that await you in the near future.

## Risk Analysis and Management

*Auditing*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

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 Rankins: Cut Through Financial Reporting's FOG

*Accounting*

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

**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.

## Raising Financing

*Finance*

**Don Minges, MBA, The Numbers Guy CFO, LLC**



This session reviews proven methods to raise capital and discusses new methods to raise financing such as Crowdfunding. What are the pros, cons, and sources for each type of financing? What do banks require when you borrow? What do equity investors look for when analyzing making an equity investment? What are the fundraising techniques that small enterprises commonly use that established businesses can now use? How do you present the request for capital to increase your chances for success? If you are involved with raising capital, this material is essential.

## Systemic Risk: Six Mega-Trends Facing Organizations Today

*Auditing*

**Richard Karwic, MBA, Executive Education, Inc.**

Worldwide trends can impact our business. In general, accountants are so detail oriented that we sometimes don't pay attention to the "bigger picture" and don't see the impact emerging business models, innovative technologies or global competition have on our organizations. This session discusses six mega-trends and how they can create both hazards and opportunities for your company

## Use Performance Metrics: Improve Planning and Control

*Accounting*

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

Many financial managers wage a constant struggle to keep their projections current and their operating managers engaged and focused on their budgets. This session will show you how to use performance metrics to reduce forecasting work, improve financial control and manager engagement in their department's numbers. This session will help you answer some of the following questions:

- How do you know what your metrics should be?
- What is the best way to measure activity output?
- Why should financial planning begin with benchmarking your metrics?

Join financial management veteran John L. Daly for this helpful session.

## Business Law

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### LGBT Employees and their Families: What Every Manager Should Know

*Business Law*

**Tim Cordes, JD, Cordes Law**

People with differing sexual orientations and gender identities have always worked among us. Until relatively recently, our lesbian, gay, bisexual and transgendered colleagues may have hidden their private lives from management and co-workers fearing possible repercussions. With increasing social acceptance and legal protections, many of our LGBT colleagues are no longer hiding their true selves in the workplace. Changes in the law now allow gay and lesbian couples to form families, creating new issues that employers and supervisors must understand. This session will help you become aware of the terminology and issues of managing in a diverse workplace that includes members of the LGBT community.

## Protect Yourself: Legal Responsibilities of Directors

*Business Law*

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

The 21<sup>st</sup> 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.

## Communications

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### Communication Skills for Financial Managers

*Communications*

**Jeannie M. Ballew, MS, EditProse**

This session will teach you how to speak *and* listen so that you, your employees and your clients all understand each other. 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.

### Communications Success: Make Your Message Stick

*Communications*

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



New

Great ideas are only great if they are implemented. How can you make your ideas matter to others? Learn the six steps to make your ideas stick.

### Double Your Impact & Cut Your Writing Time in Half

*Communications*

**Jeannie M. Ballew, MS, EditProse**

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.

*I found the program to be very informative and helped me to consider broadening my skillsets as a leader in my company.*

- Carmel, IN

## Performance Analysis: Identifying Profit Improvement Opportunities

*Communications*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

**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.

## The Power of "Why"

*Communications*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

Today's business leaders need to understand more than simply the financial impact of operations. They need to understand "why" these outcomes occur. Only by understanding the causes can you develop the appropriate actions for improved results. Learn how to understand the root causes of your financial performance. Discover how to use the "5 Whys Method" of root cause identification. Explore how to use these root causes in creating actionable reports.

Successful financial managers know how to "Connect the Dots". Put the "Power of Why" in your analytical toolbox! Start connecting today!

## Speak So They Listen!

*Communications*

**Jeanne M. Ballew, MS, EditProse**

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.



## Tell Me a Story

*Communications*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**



Everyone enjoys a good story. Stories create mental pictures, stimulate critical thinking and provide concrete examples of theoretical concepts. Learn to become a memorable speaker who can move, motivate and lead others through the craft of storytelling. Don't just simply relay your financial results. Discover how to mesmerize your company's audiences in a way that makes it easy for them to come away motivated for action that can improve their bottom-line. Remember, if the audience didn't get the message, you probably delivered it in an unmemorable way! Boost your business communication effectiveness through the medium of storytelling.

## Ethics

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### Business Ethics Don't Exist: The Only Ethics Rule You Need to Know

*Behavioral Ethics*

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



Most ethics courses focus on unethical individuals and their terrible misdeeds. We don't need another course on lessons from Enron or individuals committing fraud. Most unethical failures result from unethical individuals. Instead, this session will focus on how good people can do better, why there is no such thing as business ethics and why we only need one rule to lead ethical lives.

### Cases in Corporate Ethics: Real Life Dilemmas

*Regulatory Ethics*

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

Anyone who has ever attended a lecture-format ethics session knows there is a better way. This session examines real world ethical dilemmas that others have encountered. Sometimes professionals handle their situations skillfully; sometimes they are left wondering "what happened?" long after the fact. Get prepared before something happens to you. Once you have taken a case-based ethics session, you will never want anyone to listen to someone just read you the rules ever again.

*Excellent targeted ethics course that is very practical. Very enjoyable presentation, and John is an excellent presenter who is able to engage the audience.*

- Vancouver, BC

## The Civil Advantage: Workplace Ethics and Civility

### *Behavioral Ethics*

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

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.

## Corporate Ethics Cases in Diversity and Inclusion

### *Regulatory Ethics*

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



The AICPA Code of Professional Conduct makes it clear that workplace harassment and discrimination is unacceptable, but gives little further guidance. Other behavior standards can help us fill the gaps. This session will discuss cases involving ethical issues relating to diversity, sexually hostile work environments, gender identity, and discrimination.

## Devious Ethics: Dealing with Snakes in Suits

### *Behavioral Ethics*

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

Good people believe everyone else is just like them. We cannot imagine someone could con us or our company and have no guilt or remorse. Lack of guilt and empathy are key traits of a psychopath. Experts estimate one out of 25 executives is a psychopath and 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.

## Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations

### *Behavioral Ethics*

**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.

## Resolving Ethical Conflicts

### *Regulatory Ethics*

**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!

# Management

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## 3 Market Analysis Priorities to Drive Profitability

### *Business Management*

**Sherre L. DeMao, CGS, SLD Unlimited Biz Growth, Inc.**

If you only analyze financial statements, you are probably missing many opportunities to increase profitability and cash flow. In this session, you will learn a Profit Sizing™ process involving three key types of market analysis areas:

- 1) Business offerings;
- 2) Market segments; and
- 3) Geographic pockets

Developed through 30 years of studying entrepreneurial enterprises, this session brings new thinking around profitability that encompasses an inside-out look, leading to better strategic decisions and profits. You will walk away with an analysis tool you can immediately put to use that will improve your organization's promotional strategy, marketing concentration, price justification, operational decisions and cash flow.

## 4 Critical Factors to Create Sustainable Growth

### *Business Management*

**Sherre L. DeMao, CGS, SLD Unlimited Biz Growth, Inc.**

The world changes rapidly. If your business strategy is not built on this premise, you are already falling behind. Intelligence, emotional acumen, agility, and profitability are all critical to growth, and essential amidst constant change.

Based on validated research and best practices, this session will introduce you to a Sustainable Growth Model™ to enhance your organization's ability to grow organically through four critical success factors: 1) Intelligence Quotient (IQ); 2) Emotional Quotient (EQ); 3) Velocity Quotient (VQ); and 4) Profitability Quotient (PQ). When all four quotients operate at high levels, you are in the best possible position for sustainable, value-building growth.

## 5 Business Books in 100 Minutes



*Business Management*

**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 , ***Brain Rules, Leaders Eat Last, Snakes in Suits: When Psychopaths Go to Work, Quiet: The Power of Introverts in a World that Can't Stop Talking*** and ***Zero to One***. Save time, learn the key lessons of five business books in just 100 minutes.

## 8 Attributes of Every Winner



*Business Management*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

What makes someone a winner? What do the winners do differently? The answer is - a lot. Winners have a plan that we all can follow. This session will review the steps and actions winners take and how we all can become a winner! If you want to win and hate to fail, this session is for you.

## Accounting Reimagined: The Future of Our Profession



*Business Management*

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

In a world of too much constantly changing information, the challenge for financial professionals is how to provide the right amount of information at the right time and in the right way. How can we create truly innovative finance departments? Learn a few simple steps you can take now to create a 21st century finance department, which will add true value to your company.

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

*Business Management*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

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.

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

*Business Management*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

All of us can improve our leadership skills. This session discusses timeless leadership lessons learned from an 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

*Business Management*

**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 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.

## The CFO's Role in Compensation and Bonus Plans

*Business Management*

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

For many organizations, compensation is the single most important cost category. This webcast will discuss why the CFO must involve themselves with compensation and benefit plan design and administration. This session will pay particular attention to bonus plans, covering plan design, administration and common plan features currently in use today.

## The CFO's Role in Developing Competitive Advantage

*Business Management*

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

Boards are increasingly looking to CFOs to participate in, if not drive, corporate strategy. Most financial professionals can identify a strategy that provides a competitive advantage when they see one, but may not know where to look for it. In this session, veteran CFO John L. Daly will lead you through the strategy development process and show you how to turn your organization's search for competitive advantage into reality.

## Creating Equity Compensation Plans

*Business Management*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

In today's business world, there is a talent war and organizations with the best talent will win. We clearly need to motivate talented personnel. Equity compensation plans are useful to retain, reward and recruit. Whether your business is large or small, developing an effective equity compensation plan is a challenge. Most companies that implements an equity compensation plan changes it soon afterwards because it did not function as intended, upsetting the most valuable employees, and failing to achieve the intended result. This session will discuss the numerous plan considerations to help you retain the key personnel who will lead your business to continued success.

## Critical Thinking for Financial Professionals

*Business Management*

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

## Doing More With Less

*Business Management*

**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 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 but can deeply affect your financial department's operations.

## Effective Networking: Energize Your Career

*Business Management*

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

**Sherre L. DeMao, CGS, SLD Unlimited Biz Growth, Inc.**

It is not who you know, but who knows you. You land jobs, win clients, make sales and get promotions based on your visibility within your company, industry and business community. According to several studies, people find 70-75% of all new jobs through networking. Despite knowing we should network, the prospect of talking to others in a room full of total strangers or making new phone contacts may terrify us. This session will help you get the courage to network by preparing you for that phone contact or networking event. We will talk about what to say, how to say it and why you will do your most effective networking when you listen a lot more than you talk. The skills from this session can put you on the path to networking like an expert.

## Finance and Innovation: Reinvent Your Department and Your Company

*Business Management*

**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 Management: 10 Tips for Success, 13 Signs of Failure

*Business Management*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

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



Today's effective financial leader must establish on-going credibility and adaptability to be effective. Finance professionals operate in a landscape of constant flux, yet financial management's fundamental success skills do not vary. Hear a veteran financial executive discuss why some financial managers succeed while others fail.

## The Five Dysfunctions of a Team

*Business Management*

**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.

## Generations at Work: Finding Common Ground

*Business Management*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

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.

## Improve Teamwork

*Business Management*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

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.

## Improve Your Profit: Identify Cost Cutting Opportunities

*Business Management*

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

Could your company survive the next downturn without a staff reduction? Discover ways to make your company more efficient and profitable so you are ready! This fast-paced session will teach you how to use performance and process improvement techniques to identify and implement cost saving operating controls and processes. Based on the Finance Transformation principles and Big 4 consulting techniques, this session will show the experienced financial manager how to make their teams more efficient and value-added then applying these lessons in their organizations.



## Introvert Power: Why Quiet Leaders are Successful

*Business Management*

**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.

## It's All About Action! Deeds, Not Words, Really Count

*Business Management*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**

Talk is cheap! Action moves people better than unfulfilled ideas. Actionable concepts serve as a catalyst for change. This session will assist you in developing actionable messages and achieve buy-in as you implement new processes. Discuss the power of the planning and the impact of the quantity, strategy and tactical trifecta.



Heed the advice of legendary University of Alabama football coach, Paul "Bear" Bryant, and "Cause something to happen."

## Leaders Eat Last

*Business Management*

**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 by the Numbers

*Business Management*

**C.S. “Bud” Kulesza, CMA, CFM, Executive Education, Inc.**

Many people’s memoirs have included lists of advice for anyone who aspires to a leadership position. This entertaining and informative session compares these lists and looks for common themes that can provide important lessons for anyone who has, or aspires to have, a leadership role in their organization.

## Lean Accounting: Doing More With Less

*Business Management*

**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.

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

*Business Management*

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

The Duke of Wellington is credited with saying, *“The Battle of Waterloo was won on the playing-fields of Eton.”* From before the 19<sup>th</sup> Century to today, sports have molded our business and professional leaders. Sports can teach today’s accountants about many 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!

*The speakers I felt were extremely effective in getting their points across while capturing my attention.*

- Carmel, IN

## Managing People: Conquering the Soft Side of Your Job

*Business Management*

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



Financial managers rarely get fired due to lack of GAAP or tax knowledge. They get fired because they fail at the people side of their job. An accountant with good people management skills can rise to CEO, but if you can't manage and develop people, your career scope will be very limited. Attend this session to gain people management insight from C-Suite veteran John L. Daly.

## Negotiating with Your Banker: Get the Best Deal

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

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

**Don Minges, MBA, CPA, The Numbers Guy CFO, LLC**

Some CFOs think that your banker's proposal is a "take it or leave it" proposition. We can negotiate banking relationships just as we would with any other vendor. This session will discuss how to tell your organization's story, why you should regularly communicate with multiple banks, and how to put yourself in the strongest possible bargaining position. Issues discussed include loan terms, interest rates, covenants, and owner guarantees. If your organization needs bank financing, this session is for you.

## Nonprofit Boards: Working with or Serving on Nonprofit Boards

*Business Management*

**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

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

- Manchester, NH

## The NOT Not for Profit: Run Your Organization like a Business

*Business Management*

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



Successful not-for-profit organizations run on passion, drive and creativity. However, successful not-for-profits also need to plan properly, allocate resources efficiently and report tangible results to stakeholders. The best not-for-profits use the same business principles that create the most successful companies to achieve their goals. We will examine how your not-for-profit can benefit from key principles that drive the world's most profitable businesses.

## Open Book Management: Making it Work in the Real World

*Business Management*

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

Some organizations create extraordinary success by broadly sharing financial information with team members at all levels. Others have tried and failed. This session discusses how real-world organizations have transformed their cultures using open book management. You will gain insight into what works and what does not, learning how giving team members a stake in the action can motivate everyone to create company performance far beyond anyone's expectations.

## Optimizing Your Staff's Performance: Creating and Sustaining the Best Team

*Business Management*

**William F. O'Brien, MBA, CPA, Executive Education, Inc.**



A chain is only as strong as its weakest link. The same theory applies to departmental performance—the overall result is only as strong as its weakest contributor. Leave this interactive and entertaining session with insight for developing and sustaining the best team you can possibly assemble.

The four elements in this process are (1) hiring, (2) development, (3) leadership and (4) environment. Discuss how to effectively use these elements in creating outstanding organization. Discover the power of the 10 Attributes for Leadership Success and the negative impact of Leadership's Fatal 13. Above all, learn how to combine these four elements as a successful catalyst for sustained high-quality output and results.

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

- Atlanta, GA

## Prepare for a CFO Role

*Business Management*

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

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 Strategies: Find the Right Fit for Your Products

*Business Management*

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



A logical pricing strategy exists for every situation, but different situations call for different strategies. While choosing the right strategy does not guarantee success, choosing the wrong strategy usually guarantees failure. Attend this session to gain insights into common pricing strategies and learn where your organization's products belong.

## Principled Negotiations: Getting to Yes

*Business Management*

**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.

## A Profession of Many Hats

*Business Management*

**C.S. "Bud" Kulesza, CMA, CFM, Executive Education, Inc.**

Professional success requires us to "wear many hats", often seemingly unrelated to our everyday jobs. This fun-filled, motivating session provides a path to ensure career success. Bud provides anecdotes about the knowledge, skills and abilities you need to advance your career. You will enjoy this informative and memorable presentation.

*My takeaways were lots of the leadership ideas I learned today.*

- Indianapolis, IN

## Profit Improvement: Ten Tips

*Business Management*

**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.

## Reinventing the Finance Role

*Business Management*

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

When everything you must accomplish seems overwhelming, it is often hard to see the big picture. Step back and understand your role as others do. Your board, CEO, peers and the rest of the organization are customers for the information you create. Understanding their perspective will change how you gather, process and distribute information. It will change your focus from dealing with the past to collaborating with others to make the future happen. As a result, you will work more efficiently and will be far more valued. This session will help stimulate your way of thinking about your own position and the department you run.

## Selling Your Business: What You Need to Know

*Business Management*

**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.

## Staff Retention: Attract and Keep the Best People

*Business Management*

**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!

*Speakers did a superb job of keeping things interesting!!*

- Indianapolis, IN

## Step 1 in Change: Understand Your Culture

*Business Management*

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



Corporate Culture is the set of rules, values and norms that define an organization's behavior. Culture is at its core, "the way we do things around here". Ultimately, culture determines not only how the organization defines success, but also how the organization accomplishes it. Understanding corporate culture is critical to the ability of any organization to succeed.

## Teamwork – Create a Cohesive Team

*Business Management*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

Teamwork is the ultimate competitive advantage both because it is so powerful and rare. Why do some teams produce and win, while others fail? What do great team leaders 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.

## Time Hacks: Proven Ways to Save Time, Money and Get More for Less

*Business Management*

**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!

## Understanding Value from the Customer's Perspective

*Business Management*

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



When a company has a unique, well-differentiated product, understanding value from the customer's perspective becomes the most important factor in profitable pricing. Yet, many organizations adopt a "value pricing strategy" without having performed the analysis to understand either how much they could get for their products or the minimum acceptable price.

This session discusses four techniques for understanding value.

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

- Minneapolis, MN

## Top Ten Business Myths: Avoid these Errors!

*Business Management*

**Don Minges, MBA, The Numbers Guy CFO, LLC**

This session discusses ten of the most problematic myths, mistakes, risks, and hidden landmines inherent in every business. We will learn from the mistakes of others who often paid a steep price so that we can learn valuable lessons. If you are a leader who wants your business to become even more successful, this session is for you.

## Working with Your Board and Audit Committee

*Business Management*

**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.

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

Indianapolis, IN

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

- Troy, MI

# Technology

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## 2019 CFO Technology Update

*Information Technology*

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

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



This session provides a comprehensive update of various technology trends and innovations impacting you, your organization and the accounting profession. Topics will include IoT (Internet of Things), artificial intelligence, data analytics, business intelligence, cloud accounting software and more.

## Big Data: Modern Data Analysis

*Information Technology*

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

In 1958 if you bought a hammer in a local store you probably paid cash. The owner would know only he sold something and had more cash at days end. Today if you buy a hammer from you probably pay with a credit card and the stores know what kind of hammer you bought, your past purchase history, where you live and have approximations of your age, income and much more information. As accountants, we are still recording essentially the same information as in 1957, when our businesses need all the other “big data” to make the best business decisions. Are you and your company ready to benefit from big data? This session will discuss how to get started.

## Blockchain Technology – What Every CFO Should Know

*Information Technology*

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

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

One of the most talked about new technologies that has the potential to significantly disrupt the accounting industry is Blockchain. It is getting a lot of attention from many of the thought leaders in the IT industry. This session will provide you with a practical and easy to understand explanation of Blockchain and the potential applications for it in accounting and finance.

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

- West Columbia, SC

## Business Intelligence and Analytics: Make Sense of Your Data

*Information Technology*

**Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC**



Volatility and complexity are the new normal. Most organizations are drowning in data, but starving for information. The finance and accounting function has the opportunity to leverage Big Data and the continuum of analytics – descriptive, diagnostic, predictive, and prescriptive. All are useful for better decision making. Collecting, validating, and reporting data is not the same thing as analyzing information where we can glean valuable, actionable insights. In some ways the finance function is many years behind other disciplines such as marketing, sales, and supply chain managers, in applying analytics. How can the CFO's function catch up?

## Data Analysis and Management

*Information Technology*

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

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.

## Excel – Using Charts for a Non-Financial Audience

*Computer Software*

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

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



This session will show you how to use Excel's charting and formatting features to present financial data to a non-financial audience.

We will explore the many capabilities of presenting your data without showing rows and rows or columns and columns of data. Learn to create charts with ease; customize the elements of your charts; understand which chart will work best in your situation; and use charting to visually communicate your data.

*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

## Excel – Using PivotTables for Data Analysis

*Computer Software*

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

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

Excel is the #1 data analysis tool for accountants. Yet many accountants have never learned the basics of data analysis using Excel or the tools that Excel offers to help with data analysis. This session will teach participants the importance of PivotTables for analyzing data. We will demonstrate how PivotTables can make analyzing data an easy task for all accountants. Participants will learn the systematic process to create PivotTables and PivotCharts. We will also cover all the setup options and features.

## Getting the Most from Your Information Systems

*Information Technology*

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

**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.

## Improving Collaboration Using the Office 365 Teams App

*Computer Software*

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

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



In today's digital world, working in teams can be cumbersome. We have hundreds or thousands of files, emails, voice mails, notes and instant messages stored in different places. If you work in different teams, each team may have their own processes to communicate. There MUST be an easier way you can find all team items in one central place.

That is where Microsoft Teams in Office 365 comes to the rescue. Teams are collections of people, content, and tools that center around different projects and jobs within an organization. Teams is a central "Hub" where all things related to the team are maintained. This includes files, chats, notes, tasks, messages, videos and more. In this course, you will learn how to bring together all your team's conversations, files, and tools in this single workspace.

## Introduction to Data Analytics and Microsoft Power BI Tools

*Computer Software*

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

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

Excel is the #1 data analysis tool for accountants. Yet most accountants have never learned the basics of data analysis using Excel or the tools that Excel offers to help in this area. Those that learned to analyze data using PivotTables, soon learned there were many weaknesses in PivotTables that resulted in elaborate calculations in order to perform simple tasks.

In this session, we will provide an overview of the various PowerBI tools and discuss Microsoft's PowerBI Strategy. We will begin by explaining the challenges faced by many accountants when it comes to analyzing data in Excel. You will learn how each PowerBI tool reduces the challenges and improves your data analytic skills. You will also gain a complete understanding of when to use which tool.

## KPI Dashboards – The New Financial Reporting Model

*Computer Software*

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

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



CEOs, entrepreneurs, and management professionals are all clamoring for real time financial dashboards. KPI (Key Performance Indicator) dashboards is that application. One of the primary drivers of this dynamic financial reporting model is cloud based accounting systems.

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

## Leverage Big Data and Data Analytics to Make Better Decisions

*Information Technology*

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

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



Two of the hottest topics in business today are big data and data 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.

## Make Your Information Systems Work for You

*Information Technology*

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

The first few decades of computerized accounting systems failed to result in any accounting costs reductions and many financial professionals had the vague impression that they were working for the computer system rather than the other way around. The last 25 years have yielded great cost savings for companies who use their information systems effectively. However, many organizations are getting far less from their accounting systems than they should. This session will help stimulate your thinking about how to make your accounting system work for you!

## MS Office 365 - Software Applications Lightning Round

*Computer Software*

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

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

At last count, there were over 20 unique applications available in the Office 365 bundle. These range from the traditional Office desktop applications such as Excel, PowerPoint, Word, etc., to a whole new generation of cloud-based applications such as OneDrive, SharePoint, Yammer, Delve and more. These newer cloud-based applications will help you transform to a digital business model. This session will provide a high-level review of all the core Office 365 cloud applications, so you can assess the strategic potential for your organization.

## MS Word: Advanced Features

*Computer Software*

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

*Content was spot on and useful in actual work performance.*

- Charlotte, NC

## Office 365 – What You Need to Know Before You Subscribe

*Computer Software*

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

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



This course will provide you with all of the information you need in order to understand what Office 365 is all about. It is important to understand that the traditional Office suite of applications is just a small part of what Office 365 has to offer. The real game changer is the Office 365 cloud-based applications that enable and enhance internal and external communication, collaboration and information sharing. Office 365 will do for communication and collaboration what spreadsheet software did for columnar work papers.

Upon completion of this course, you will have a solid foundation of knowledge about Office 365 from which to make the appropriate strategic decisions for your organization. It is not a matter of "if" you should deploy Office 365, it is more likely a matter of "how" and "when."

## OneNote – Mastering Organization of Your Notes & Correspondence

*Computer Software*

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

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

OneNote is rapidly becoming one of the most popular applications in the Microsoft Office and Office 365 product suites. The reason for this becomes evident when you learn about all you can do with OneNote to record and manage notes, to do lists, meeting agendas and much, much more. This session reviews all the features OneNote offers and examines how to apply them.

## Outlook – Manage Your Email with Maximum Efficiency

*Computer Software*

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

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



Are you finding it more and more difficult to manage the volume of your email messages? Do you worry about missing the follow-up on important emails? Do you feel like you waste a lot of time dealing with unimportant or unwanted emails?

If you answered yes to any of these questions, this session is well worth your investment. We will review Outlook features to manage your inbound and outbound email, saving yourself at least an hour of time each week.

## PowerPoint Advanced – Take Presentations from Good to Great

*Computer Software*

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

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



Learn how to leverage the more advanced features of PowerPoint to take your presentations to the next level. You will create more effective presentations with a multitude of advanced features. We will cover slide transitions and animations as well as embedding audio and video content into your presentations. We will show you how to leverage the full capability of SmartArt to make your presentations pop!

We will also discuss how to customize the master layouts to visually improve your presentation by creating a standard custom look. You will learn how to build your own theme and slide layout templates. Once your presentation is complete, we will take you through advanced slideshow presentation techniques. Be prepared to wow your audiences!

## PowerPoint Fundamentals – Create Engaging Presentations

*Computer Software*

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

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



In this course you will learn how to create presentations that look professional and clearly deliver your message to your audience. You'll benefit from a step-by-step guide for building a presentation, including understanding the PowerPoint interface. We will also dive into topics such as using themes and layouts; adding graphics, photos and other objects to engage the viewer; and tips & tricks for delivering your PowerPoint presentation.

## Roadmap to Excel's Data Analysis and PowerBI Strategy

*Computer Software*

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

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



We are entering an era where CPAs are expected to have data analytics and business intelligence skills. Why is this happening? What can you do to prepare yourself? We will explain data analytics and business intelligence from the perspective of a CPA, both in public and private practice. We will provide a clear and concise review of Microsoft's new Excel and Power BI tools that are built on the Excel platform and provide a roadmap for the most cost-effective way for you to develop these skills.

## Roadmap to Microsoft's Office 365 Ecosystem

*Computer Software*

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

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



For any organization that uses the Microsoft Office suite; Excel, Outlook, Word, etc. It is not a question of "if" you should move to Office 365, rather it is "when" and "how." This session is designed to introduce you to the Office 365 ecosystem of over 20 cloud-based applications that are directly integrated with the desktop Office suite of applications.

If you want a quick and easy way to get up to speed on what Office 365 is all about and the strategic impact it can have on your organization, this is a "must attend" session.

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

- Atlanta, GA

*Excellent program. Excellent presenters.*

- Iowa City, IA



## 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

*Loved it! Will be back for future sessions*

Vancouver, BC

*Very helpful tips and information that can be used daily.*

- Kansas City, KS

*This year's team of speakers was outstanding, and the topics were right on target. Thank you for offering such a great learning opportunity!*

- Indianapolis, IN

*Loved the stories – lots of good practical advice.*

- Fargo, ND

*In particular, I enjoyed the presentation by Sherre which was backed up by real life experience.*

- Carmel, IN

*He really involved the audience so it kept your attention.*

- Atlanta, GA

*Likely the best presenter I've heard at any MICPA 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



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