

CPA Educators' conference

March 23-25
2022

SOFITEL CHICAGO MAGNIFICENT MILE

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Speaker biographies & materials

Getting Our Mise en Place: Setting our Table for the Future

State of the Profession Update and Discussion

Business Case for Designing an Experience-Led Organization

1A. Upskilling Brought on by COVID

1B. Future of Learning

2A. Data Analytics using Power BI for State Societies

2B. Hybrid Events Panel

3A. LMS Choice & Implementation: Lessons Learned

3B. Automating CPE Tracking: Including Hybrid Events

4A. The Balancing Act Between Learning & Membership

4B. Post COVID Event Planning

Closing Session: DEI & Ethics - What's in it for Business Professionals

Wednesday, March 23, 2022

Time	Session	Room
3:00-3:10pm	Welcome & Opening Remarks Todd Shaprio	Paris Ballroom
3:10-3:50pm	Getting Our Mise en Place: Setting our Table for the Future Tom Hood	Paris Ballroom
3:50-4:30pm	State of the Profession Update and Discussion Hayden Williams	Paris Ballroom
5:00-6:30pm	Welcome Reception Sponsored by ZOHO	Chicago Ballroom

Thursday, March 24, 2022

Time	Session	Room
7:45-8:25am	Registration and Breakfast Sponsored by: AICPA	Chicago Ballroom
8:30-8:45am	Opening Remarks	Paris Ballroom
8:45-10:00am	Business Case for Designing an Experience-Led Organization Ed Bodensiek	Paris Ballroom
10:00-10:15am	Morning Break Sponsored by: ACPEN	Chicago Ballroom
10:15-11:15am	Breakout Sessions	
	1A. Upskilling Brought on by COVID Jon Lockhorst	Cannes
	1B. Future of Learning Russell Collingworth	Paris Ballroom
11:15-11:30am	Break	Chicago Ballroom
11:30-12:30pm	Breakout Sessions	
	2A. Data Analytics using Power BI for State Societies John Higgins	Cannes
	2B. Hybrid Events Panel Jon Lokhorst, Nick Rial, Nichole Favors, Paul Burton	Paris Ballroom
12:30-1:30pm	Lunch with Exhibitors	Chicago Ballroom

	Sponsored by: K2 Enterprises	
1:30-2:30pm	Breakout Sessions	
	3A. LMS Choice & Implementation: Lessons Learned Hayden Williams, Nick Rial	Cannes
	3B. Automating CPE Tracking: Including Hybrid Events John Pytel	Paris Ballroom
2:30-2:45pm	Afternoon Break	Chicago Ballroom
2:45-4:00pm	CPE Roundtables	Paris Ballroom
4:00-5:00pm	Sponsor Showcase Sponsored by: Surgent CPE	Chicago Ballroom

Friday, March 25, 2022

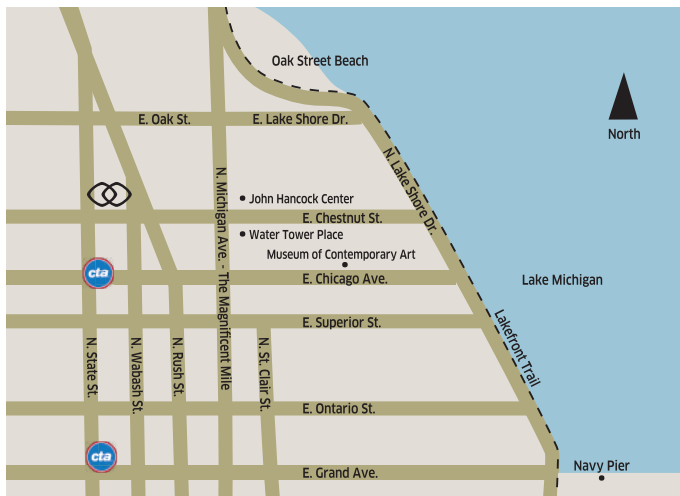
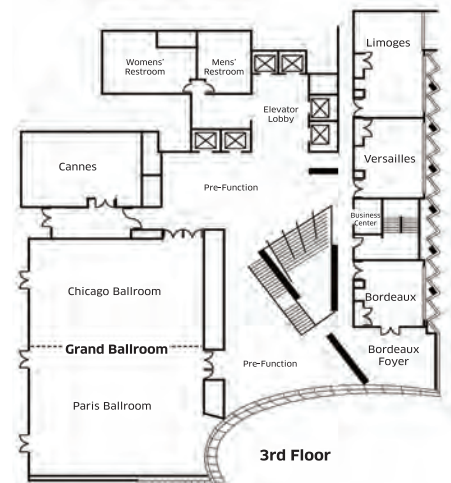
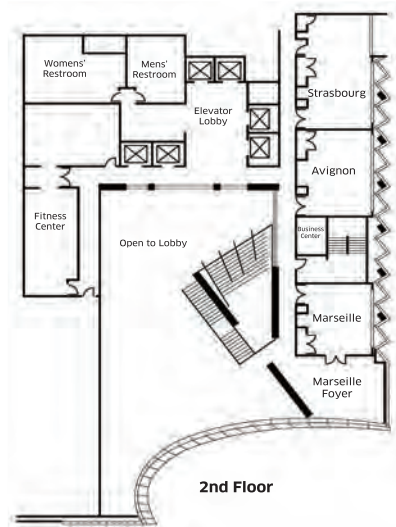
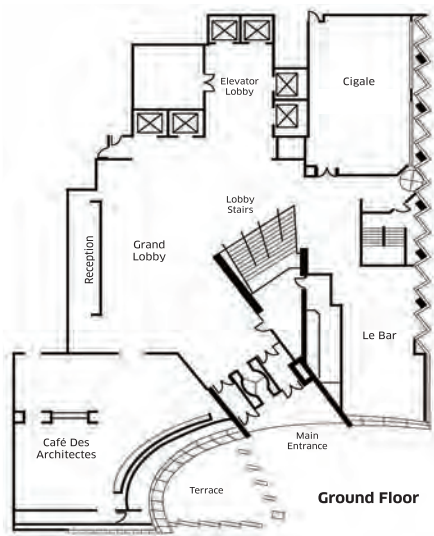
Time	Session	Room
8:15-8:45am	Breakfast with the Sponsors	Chicago Ballroom
8:50-9:50am	Breakout Sessions	
	4A. The Balancing Act Between Learning & Membership Josh Goldman	Paris Ballroom
	4B. Post COVID Event Planning Aaron Wolowiec	Cannes
9:50-10:20am	Checkout Break	
10:20-12:00pm	Closing Session: DEI & Ethics - What's in it for Business Professionals Clare Levison	Paris Ballroom

5TH Annual CPA Educators' Conference

March 23 - 25, 2022

Chicago, IL

Hotel Map & Meeting Rooms



NEARBY

- **Museums** Museum of Contemporary Art, Art Institute of Chicago, Shedd Aquarium, The Field Museum of Natural History, Museum of Science and Industry, Adler Planetarium
- **Attractions** The Magnificent Mile, Navy Pier, Millennium Park, Lincoln Park Zoo, Chicago Lakefront Trail, Oak Street Beach, Cloud Gate

TRANSPORTATION

- ✈ O'Hare International Airport (28 km / 16 mi)
- ✈ Chicago Midway International Airport (21 km / 13 mi)
- 🚇 Chicago El Train System



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Thank you to our sponsors!



W E S T E R N TM C P E

A LITTLE BIT ABOUT OUR SPONSORS

ACPEN – Break Sponsor

The Accounting Continuing Professional Education Network (ACPEN) is the largest and most comprehensive CPE network in the nation. Through our partnership with many associations and our NASBA accreditation, ACPEN brings world-class CPE to your desktop in the most engaging and interactive way possible! ACPEN offers a vast catalog of live video webcasts and live webcast replays, ranging in length from 1–8 CPE credits. All ACPEN webcasts are written and taught by the author, which we believe provides our viewers with the highest quality instruction, information, and the most authentic learning experience possible.

In addition, ACPEN can work with its partner organizations in a variety of ways to support the needs of each organization. We offer remote production services for hybrid events, virtual conference hosting, distribution of partner content through the ACPEN network, as well as LMS services.

AHI

For over 40 years, AHI Associates has provided quality, hands-on staff training through our five integrated courses. We offer both virtual and in-person staff training options. All courses are led by dynamic discussion leaders with CPA firm experience. Participants will be actively engaged throughout each course, whether in-person or virtual (using Zoom breakout rooms), rather than passively listening to a lecture or a webcast.

New for 2022, AHI Associates is partnering with state societies to provide virtual staff training to your member firms. We will handle all the course administration, including Zoom setup, issuance of CPE certificates, and attendance polling and registration reports. Your society will continue to handle the marketing, registration, and fee collection but will have no responsibility for course day monitoring. Stop by our sponsor table and speak with Rich Ferdinand, AHI's Director of Virtual Learning, who can give you all the details.

AICPA – Breakfast Sponsor

The Association of International Certified Professional Accountants (the Association) is the most influential body of professional accountants, combining the strengths of the American Institute of CPAs (AICPA) and the Chartered Institute of Management Accountants (CIMA) to power opportunity, trust and prosperity for people, businesses, and economies worldwide. AICPA & CIMA represents 696,000 members, students and engaged professionals in public and management accounting and advocates for the public interest and business sustainability on current and emerging issues.

Conference i/o

Conferences i/o is an attendance tracking and engagement tool designed specifically for the accounting / CPE industry. Conferences i/o offers 100% NASBA Compliant attendance tracking functionality for all group-based CPE events -- in person, virtual and hybrid. Conferences i/o is used by hundreds of organizations, from Top 10 Accounting firms to associations and state societies, to reduce the amount of time spent reconciling CPE attendance and credits by 80%.

CPA Crossings

CPA Crossings was founded by two information technology experts who are also CPAs – John Higgins, CPA.CITP and Bryan Smith, CPA.CITP, CISA. Having extensive experience working with CPA firms on the design and deployment of strategic technology solutions, John and Bryan possess a keen understanding of the issues and opportunities of leveraging information technology to maximize efficiency and the quality of your client service. Their focus is always on your organization's profitability. Providing technology-based learning for CPAs that need to stay on the cutting edge of a dynamic profession.

K2 Enterprises – Lunch Sponsor

K2 Enterprises, named after the world's second-highest mountain, is a partnership of instructors formed in 1988 to teach CPE sessions focused on information technology. Our goal is to produce and deliver the highest quality technology-focused seminars and conferences available to accounting, financial, and other business professionals. In addition, the entire K2 team seeks to maintain the highest level of integrity, family values, and friendship among all involved.

K2 Enterprises is one of the largest providers of technology-focused education to accounting and financial professionals in North America. Additionally, our team has delivered educational content in locations as far away as Great Britain, Israel, Australia, and South Africa. Our curriculum includes sessions on Excel and other Microsoft Office applications, budgeting, accounting applications such as QuickBooks, internal controls, artificial intelligence, and other technology-related topics.

For more information on partnering with K2 Enterprises, please get in touch with Tommy Stephens (tommy@k2e.com) or Pam Falconello (pam@k2e.com).

Surgent Accounting & Financial Education

Senjii

At Sengii we've created a comprehensive Events solution, for both virtual and physical events and wrapped it with Online Community. Our solution provides you with everything you need to run a successful Event, provides convenience for registrants, and reduces staff time.

Typically, your members look forward to an Event, then it happens, then it's over. We extend the value of your existing Events and allow people to engage before, during, and after the Event. We give you the tools to measure, consistently improve, and differentiate your offerings from that of the competition. Give your sponsors and exhibitors an opportunity to enhance your attendees' experience by creating virtual booths.

If you're applying for NASBA or similar compliance standards, you may be required to verify attendance and levels of participation. You can save your organization hundreds of hours of tedious work with our low cost and easy to use attendance and interactivity solution.

Save time, save your sanity, and increase registrations.

Contact Cate@Sengii.com or Noeli@Sengii.com to create a customized event.

Sunflower Media – Live Streaming Sponsor

Sunflower Media is a boutique production company specializing in live and original video services. Whether you need a professional camera operator to cover your event or an experienced director of photography to bring your creative vision to life, Sunflower Media can help you from concept to completion. In addition to providing personalized service and engaging content, we can help you develop a media strategy and leverage the latest online tools to deliver your message to your target audience. From startups to established businesses and non-profits, Sunflower Media offers one-time, recurring and multi-video packages to meet your needs.

Surgent Accounting & Finance Education – Reception Sponsor

Surgent is a leader in the field of continuing professional education for CPAs and other financial professionals. We provide thousands of CPE webinars, self-study courses, CPE packages, and live seminars each year for accounting, tax preparation, and financial professionals all across the country. For more than 30 years, we have partnered with nearly all state societies of CPAs. No matter the format, Surgent CPE courses cover the very latest information, regulatory changes, and practical issues related to tax, accounting, audit, ethics, government, non-profit, and technology -- topics that affect practicing CPAs, including those serving in public accounting, as well as accountants working in corporate roles such as CFOs, Controllers, and Comptrollers.

TaxU

The Tax U (© The Garvs, LLC) was developed to provide the most comprehensive and up-to-date tax and financial planning training courses for business professionals of all types. The Tax U courses distinguish themselves from the competition by using practical and real-world case studies. All of our training manuals are designed to serve as reference materials that provide continued benefit for our course participants. In addition to maintaining a library of quality material, our highly-rated and award winning instructors utilize tried and true content delivery methods. All training material delivered by The Tax U are authored by J. Patrick Garverick CPA, MT, CFP®.

Taymes

The Taymes organization was created to provide comprehensive and up-to-date education for business professionals of all types. The material that we deliver will always be based on real world applications and case examples and our manuals are designed to serve as reference materials that provide continued benefit for those that participate in our courses. In addition to maintaining a library of quality material, we have highly rated instructors that utilize tried and true content delivery methods.

Our presentation techniques make the sessions we offer not only informative but interesting as well. Finally, we provide numerous delivery formats for our sessions. These include on site group live presentation, livestreamed web broadcasted instruction, and pre-recorded web-broadcasted classes. The latter two can be presented by either using our learning management platform or one provided by another party. Taymes will always work to provide high quality education and learning opportunities for business professionals.

Van Der Aa Tax Education

At Van Der Aa Tax Ed, LLC, we focus on the most current topics affecting the tax and accounting industry. Doug combines his many years of professional experience in both the firm and the classroom with an entertaining style to provide a full (or half) day of quality training.

Bringing the classroom to your members has never been easier! Our webinars are cost effective, user friendly, and provide the most up-to-date information on hot topics practitioners need to know about now!

At Van Der Aa we also provide in-firm training solutions as a great way to customize programs based on the needs of your members and clients. You manage the logistics of the presentation....we manage the content of the materials and deliver them in the comfort of your own conference room.

Zoho Corp – Reception Sponsor

Software is our craft and our passion. At Zoho, we create beautiful software to solve business problems. We believe that software is the ultimate product of the mind and the hands. When you choose Zoho, you get more than just a single product or a tightly integrated suite. You get our commitment to continuous refinement and to improving your experience. And you get our relentless devotion to your satisfaction.

Western CPE

Since 1991, Western CPE has been a leader and innovator in the continuing professional education industry, focused on accounting and finance from the very beginning. Western CPE's roots in education run deep, beginning with our original partnership with the University of Montana, and extending to nationally respected instructors and technology partners. Our business began by offering unique Live Conferences, always conducted in ideal locations for mixing learning with fun — just as our CPE Conferences are today. However, Western CPE quickly expanded and became among the first in the industry to offer online Self-Study and CPE Webcasts, raising the bar for high-quality online learning. Today, we're one of the most trusted producers of CPE in the accounting and finance industry, helping professionals meet their CPE credit requirements through best-in-class continuing education.

Online Attendee Instructions

Access to the Sunflower Media Live Stream

- Link to access course: www.cpe.live/cpaec
Link will be active 24 hours prior to the program
- Questions for the speaker: If you have questions during the presentation, please use the “You Ask We Answer” Chat box found the lower right corner of your screen (when in the webcast platform, using the link above). Your question will be relayed to the speaker.
- Technical Support: If you experience any technical difficulties, please do not hesitate to call Sunflower Development (our webcast partner) at 785.274.9105.
- The CPE Roundtable on Thursday, March 24, 2022, at 2:45pm CST will be held via Zoom. During the virtual roundtable, Dee Sullivan from Maryland, and Tiffany Carson from Colorado will guide the virtual attendees through the same discussion the in-person group is having. Your insights will be collected and added to the insights from the group in the room and sent out to everyone.

Access Information for CPE Round Table:

<https://us06web.zoom.us/j/83401021834?pwd=YkYrRmw2amFSS2UrZnRpWU9xdkYxZz09>

Passcode: **473663**

To launch the session, select the link above

- Press launch to start the program, which will bring you to Zoom.
- Enter your first name, last name, and email address to join the meeting.
- You will be placed into a waiting room until the event begins.
- Zoom will ask you to choose ONE audio option for a better event experience. We recommend computer audio.
- You will be muted upon arrival.

2022 CPA Educators' Conference Survey

It is time to tell us what you think!

Take out your smartphone, open your camera, hover over the code below and select surveymonkey.com. This will take you to the conference survey.



We appreciate your feedback!

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1. Getting Our Mise en Place: Setting our Table for the Future

The Boston Consulting Group described the Fourth Industrial Revolution as this, “...we will experience endless waves of disruption, and complacency can be the kiss of death.” Against the backdrop of change and uncertainty, there’s an immediate need for the finance and accounting function to evolve and shift from being reactive to being anticipatory and proactive. The megatrends of technology, demographics, and regulations and standards are driving massive changes in companies and firms.

The opportunity has never been greater, the stakes have never been higher, and the risk of doing nothing is growing every day. What’s today’s accounting and finance professional to do? This session talks about getting your ‘mise en place’ and setting the table for the future.

Tom Hood, CPA, CITP, CGMA

EVP Business Engagement & Growth; AICPA-CIMA & BLI

Tom Hood, CPA, CITP, CGMA, is the executive vice president of Business Growth & Engagement for AICPA-CIMA and the Business Learning Institute. Tom recently stepped onto the global stage of the largest association of certified professional accountants in the world, representing over 690,000 CPAs, CGMAs and students. He was named the second most influential person in accounting-by-Accounting Today Magazine for the 10th year. His focus is elevating and accelerating the role of CPAs and CGMAs in corporate and management accounting. In 2012, LinkedIn recruited Tom as one of their top 100 influencers and he now has a following of over 730,000. He is a member of Forbes Finance Council and was inducted into the Accounting Hall of Fame. He is the former CEO of the Maryland Association of CPAs and former CFO of a highway construction company. He has a Master’s in finance from Johns Hopkins University and a bachelor’s degree in accounting from Loyola University of Maryland. He lives in Baltimore with his wife Sharon.

Presentation is
coming. We
will let you
know when it is
posted.

2. State of the Profession Update and Discussion

Join Hayden Williams in a discussion on trends in the accounting profession and how State Societies may play a future role in helping advance and support the profession. Hayden will discuss the trends happening today and what the future of accounting may look like. Afterward, there will be a breakout and reporting session to discuss and report back to the whole group on ideas on how State Societies will play a future role in supporting the profession.

Please note: There will be no handout or presentation for this session. The Subject Matter Expert encourages you to ask questions and take notes.

Hayden Williams, CPA, CGMA
Washington Society of CPAs

Hayden Williams, CPA, CGMA, is currently the CFO of the Washington Society of CPAs (WSCPA). Prior to this position he was the Director of Education for the WSCPA and the Director of Finance for the Arizona Society of CPAs and spent five years in public accounting.

3. Business Case for Designing an Experience-Led Organization

In an age when word-of-mouth has become weaponized, traditional marketing approaches to brand and reputation are no longer sufficient. This course educates business leaders on the changing market conditions of our Experience Economy, where experience-led brands have begun to dominate. It features an introduction to customer experience, employee experience, and intentional culture management, use cases, and metrics.

Ed Bodensiek

Cravety

Ed first founded Cravety in 2018 as a consulting firm to help clients solve business problems by applying the principles of customer experience. Clients included Coca-Cola, Marriott, CareFirst, the University of Miami, the City of Baltimore, AICPA, TEK Systems, and ICAT Logistics, among others. In 2020, together with JG Staal, Ed re-launched Cravety as a SaaS-based company obsessed with treating employees like customers. Ed served as the first Chief Experience Officer for a major law firm in the United States, head of brand and customer experience for Select Medical (NYSE: SEM), head of communications and outreach for the Fulbright Scholar Program, the Johns Hopkins Berman Institute for Bioethics, and Junior Achievement Worldwide. His background also includes a presidential appointment as director of communications and outreach at the U.S. Department of Treasury. Ed frequently consults on the future of marketing, talent brand, and customer and employee experience. He is a sought-after public speaker, trainer, and facilitator. He is the co-founder of the Customer Experience Professionals Association and Hacking HR in Maryland.



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Business Case for Designing an Experience-Led Organization

Ed Bodensiek

Business Learning Institute Provider

PRESENTED TO

Illinois CPA Society - CPA Educator's Conference

In-person (Chicago, IL)

March 24, 2022



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Ed Bodensiek, CXO

Ed's background includes serving as head of brand for Select Medical, a \$5B public company, where he oversaw a stable of 30 brands in B2C and B2B verticals. Ed also served as Chief Experience Officer for Miles & Stockbridge, the first person among U.S. law firms to hold such a role. His work has been published as a case study in providing value as an experience-led brand in the 2018 book, "Innovations in Client Experience," by Wilmington's Ark Group. Ed is a sought-after public speaker at industry conferences such as the Qualtrics X4 Summit, IQPC Chief Customer Experience Officer Exchange, and the Customer Experience Professionals Association's Insight conference. Ed owns Cravety, a boutique firm focused on human experience design, customer insight, and next-generation marketing.

Ed's background includes brand and marketing leadership roles with the Fulbright Scholar Program, Johns Hopkins University, and JA Worldwide. Ed was also appointed director of outreach and communications at the U.S. Department of the Treasury by the President of the United States.



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800-782-2036, ext. 321 | pam@aicpa-cima.com

Business Case for Designing an Experience-Led Organization

The Business Case for Designing an Experience-Led Organization

Edwin Bodensiek
Faculty Member
Business Learning Institute

CEO & Founder
Cravety
ed@cravety.com

Edwin (“Ed”) Bodensiek

- Marketing and communications background
- Healthcare, corporate law, education, software sectors
- Former presidential appointee at U.S. Treasury
- Fulbright Scholar Program
- 10+ years designing better human experiences for business growth



Co-founded
Cravety in 2018

Platform
connects with
HR systems to
solve for
candidate
ghosting and
high turnover
among
employees

What We Will Cover Today

- Understand what's changed in the “Experience Economy”
-- what clients (members) and your own employees now want and expect from you, and why
- The critical connections between the future of work—redesigning organizations so “Employee Experience” (EX) and Customer Experience (CX) reign
—so you can win the battle for talent and members

The Experience Economy (“Terms and Conditions”)

“Your brand is what people say
about you when you’re
not in the room.”

Jeff Bezos

The Experience Era of Business

“What do
you
know?”

“How many stars?”

“They really care.
LOVE LOVE LOVE
these guys.”

“NEVER again.”

“SUCH a
hassle”

“Psst! Would
you work
there?”

Word of mouth has been weaponized.



Why Customer Experience (CX)?

According to a Walker study, **customer experience has overtaken price and product** as the key brand differentiator.

86% of buyers will pay more for a better customer experience.

<https://www.superoffice.com/blog/customer-experience-statistics/>

emotion

how we *feel* drives our decision making

"People will forget what you **said**, people will forget what you **did**, but people will never forget how you made them **feel**."

— Maya Angelou

Definitions

Functional vs. Emotional Competence

Functional competence = table stakes. The “core” of your product or service.

Emotional competence = a significant competitive advantage to drive loyalty and promoters, and to mitigate detractors.

An example of the difference between functional and emotional competence ...



Customer Experience (CX)

This is what forms *reputation*.

*And that is how clients decide
on whether to use your services or not.*

13

Customer Experience (CX)

However, your customer experience goals will never exceed your **employee experience**.

An example of CX Failure, and then Success (CX + EX)



14

Align internal
+
external drivers



Total brand
experience

3 powerful ways to delight customers

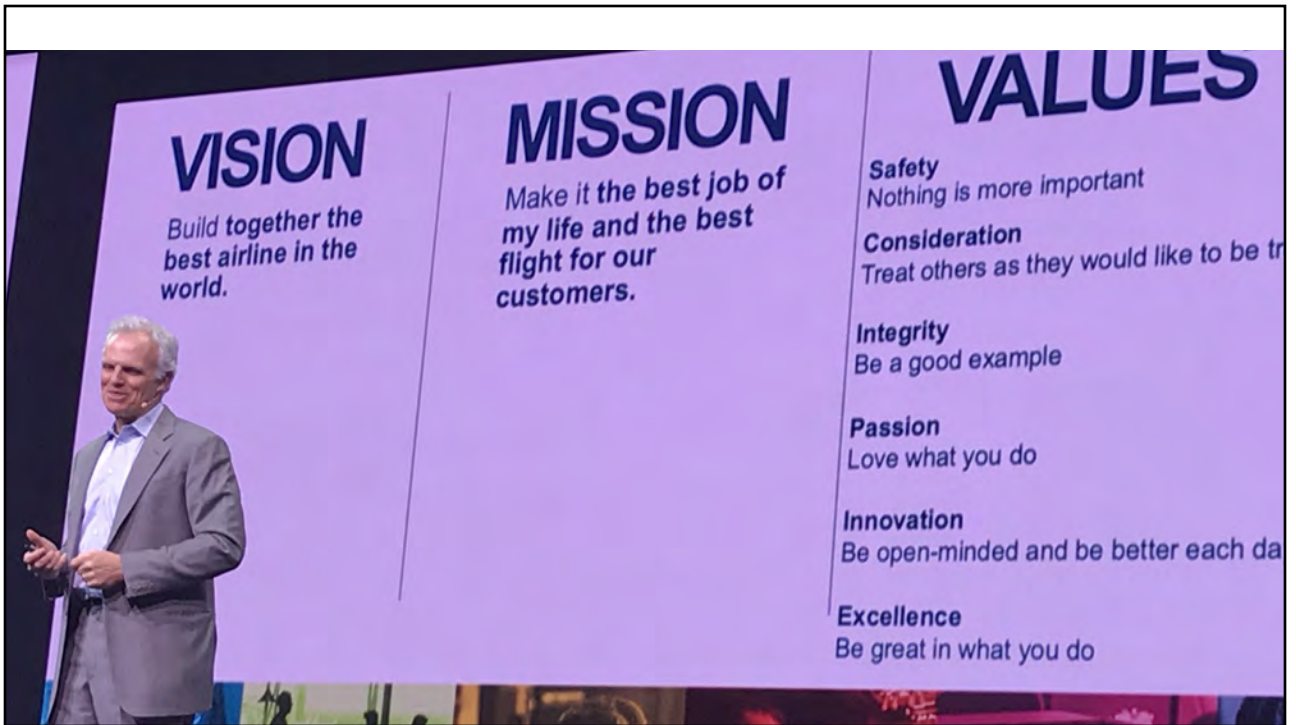
#1 training employees to act as
ambassadors of the brand

#2 creating products and services
that are as flawless as possible

#3 transforming problems into
opportunities to please customers

Constant Customer, Gallup Business Journal, June 2001

David Neeleman, Founder of Azul (and JetBlue).



Experiences impact business results

What brands do

service
sales
apps
people
marketing
products
price

Experiences impact business results

What brands do

service
sales
apps
people
marketing
products
price

How we feel



Experiences impact business results

What brands do

service
sales
apps
people
marketing
products
price

How we feel



How we respond

stay or leave
spend more
or less
tell others
value
relationships
co-create

Experiences impact business results

What brands do

service
sales
apps
people
marketing
products
price

How we feel



How we respond

stay or leave
spend more
or less
tell others
value
relationships
co-create

Impacts to the brand

revenue
share of wallet
reduce costs
referrals
retention
new customers

Impact of Customer Experience

CX Leadership can improve your revenues by 27% - 48% over 3 years
(Depends on your industry)

qualtrics^{XM}

Revenue Increases From Moderate Improvement in CX for Companies With Annual Revenues of \$1 Billion
Additional revenue over 3 years (\$ million)

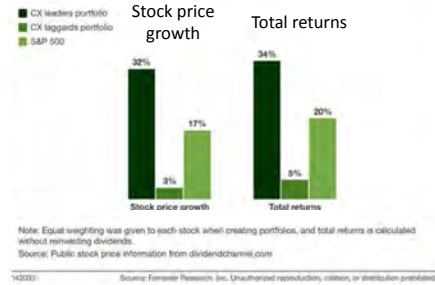
	Retaining existing business	Additional purchases	New business from word of mouth
Hotels	\$164.2	\$193.8	\$105.3
Fast food chains	\$160.6	\$172.8	\$106.4
Retailers	\$156.1	\$171.9	\$101.2
Supermarkets	\$143.3	\$174.3	\$107.6
Airlines	\$149.1	\$177.5	\$95.1
Rental car agencies	\$147.2	\$176.8	\$97.5
Software companies	\$159.9	\$111.5	\$96.6
Computer makers	\$142.6	\$159.6	\$87.7
Credit card issuers	\$146.3	\$129.4	\$97.1
Banks	\$148.3	\$137.7	\$83.3
Major appliances	\$166.5	\$106.9	\$89.8
Parcel delivery services	\$190.7	\$163.5	\$103.2
TV service providers	\$126.9	\$142.9	\$77.5
Auto dealers	\$166.6	\$152.4	\$73.8
Investment firms	\$92.9	\$147.0	\$91.0
Internet service providers	\$112.6	\$121.1	\$78.1
Insurance carriers	\$133.0	\$88.2	\$81.9
Wireless carriers	\$140.1	\$72.4	\$76.0
Health plans	\$142.3	\$65.9	\$74.0

Base: 10,000 U.S. consumers
Source: Temkin Group Q1 2014 Consumer Benchmark Study
Copyright ©2014 Temkin Group. All rights reserved.

qualtrics^{XM}

CX Leaders grow 5X faster than Laggards
(Over 5 years, depends on your industry and position)

FORRESTER



Break

Part 2

Case Studies for Competitive Advantage

What makes for a “good” experience?

Degree to which **problems are solved**


Degree of **ease of use** (i.e. no pain points)

Degree of how **good it makes a person feel**



What matters across every journey...

Totality
+
Tonality

A photograph showing a person lying on a stretcher, likely in an airport or travel setting. Medical staff or travel agents are attending to the person, with one person holding a smartphone. The scene suggests a medical emergency or a need for assistance during travel.

A culture of **care**
beats a culture of compliance.



UNITED
AIRLINES



“Ma’am, we need to pull you off this flight.”

Southwest[®]



Virgin HOTELS





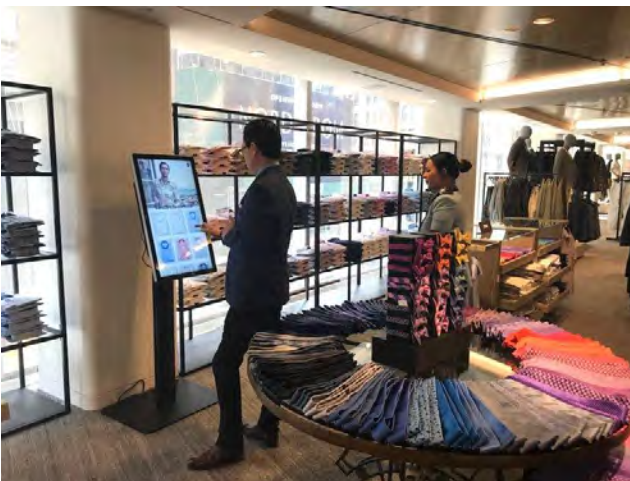
Disney's consistent business results are driven by strategically focusing on certain business functions and opportunities where competitors fail to see value and potential.

*This is the key source of what differentiates us. **We have learned to be intentional where others may be unintentional.***



-The Disney Institute, May 2017.

Intentionally designed, defining moments



NORDSTROM



THE RITZ-CARLTON®



placing a sign above patient's beds with select patient information, we can improve how we connect with patients. 'We' being anyone who goes into the room- dietary, EVS, docs-anybody. The hope is that by printing these 'About Me Boards' we can work to get them recognized as the people they are, not the patients they're being forced to be.



Call Me: Joe

I want you to know:
I love the intersection of innovation and public health, and aspire to make an impact on a global scale.

If I weren't here I would be:
Traveling through Latin America searching for that perfect cup of coffee, and writing about my travels.

My Biggest Concern is:
Most public health agencies require philanthropy to be successful. What if we could make them self-sustaining?



Call Me: Matt

I want you to know:
I was raised with both sets of grandparents nearby, which fueled my love and appreciation for older adults.

If I weren't here I would be:
Hanging with my daughter, playing some manner of frisbee, or spending quality time with my wife.

What is most important to me?
Being a positive face for new ways of doing things at Society.



Call Me: Janet

I want you to know:
I started working at the Hub in November 2015 and will be retiring in February 2020. I love about Society's history and the Society Community.

If I weren't here I would be:
Hanging out with my husband and dog.

My goal is:
To be the most helpful person I can be, and help others do the same.



Call Me: Andrew

I want you to know:
I love breakfast and cooking and writing the Hub Blog.

If I weren't here I would be:
Out at my favorite gym, spending time with my Dad, or just trying to keep up with things!

My Goal is to:
Make everyday items and experiences as fun as possible.



Call Me: Nick

I want you to know:
I am a member of the Hub and I love to help others get involved in the community.

If I weren't here I would be:
Working on a project that would help the community.

My Biggest Concern is:
I am concerned about the future of the community and how we can keep it thriving.



Call Me: Jess

I want you to know:
I believe to be a physician entrepreneur, my sector is really important to me, and I love to be involved in my community.

If I weren't here I would be:
Going to school, working on my OG bucket list, trying new foods, or post on my food Instagram.

My goal is to:
Working at the foundation, volunteering as a tax professional, or...

$$B_x = E_x + C_x$$

brand experience **employee** experience **customer** experience

The employee: a new kind of “customer”

Personalizing
the
**employee
experience**
through
behavioral
science and
corporate
intention

A single “toxic” worker has been shown to cost a company more than **\$12,000 a year**. American businesses lose an estimated **\$500+ billion annually** to issues related to disengagement. “

The Toxic Worker,” Harvard Business Review

Globally, disengaged employees cost companies **\$7 trillion (USD) per year in lost productivity**.

State of the Global Workplace, Gallup

Lost Productivity. Lost Profits.

Annual cost of lost productivity
from actively disengaged employees in the U.S.?

\$370 billion

*2019 Gallup State of the American Workplace

Significant generational change at work also underway. **Generation Z** (born after 1995), entering the workforce, cites "**empowering work culture**" (29%) over high salary (15%) as no. 1 reason to work for and stay with an employer.

HR Technologist

By 2022, **75% of organizations will include employee experience improvement as a performance objective for HR and IT groups.**

Gartner Research

Why employee experience?

- wins the battle for attracting talent
- drives engagement and retention
- positively charges employer branding
- increases productivity

Why employee experience?

- positive employee experience=happy employees
- happy employees=productive employees
- productivity = profitability
- joy = revenue.



What Are The Three Biggest Employee Challenges?



**Poor
Communication**



**Job
Dissatisfaction**



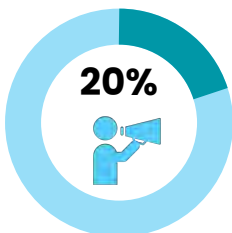
**Work
Disconnect**

49



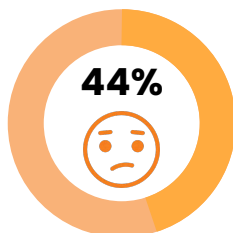
What Does The Research Say?

Poor Communication



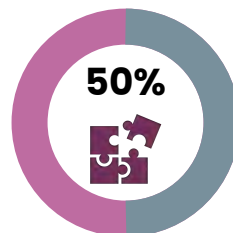
of a work week is spent sending, reading, and receiving emails (that's one day a week!)

Job Satisfaction



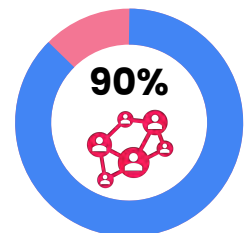
of employees would change jobs for a more innovative environment

Work Disconnect



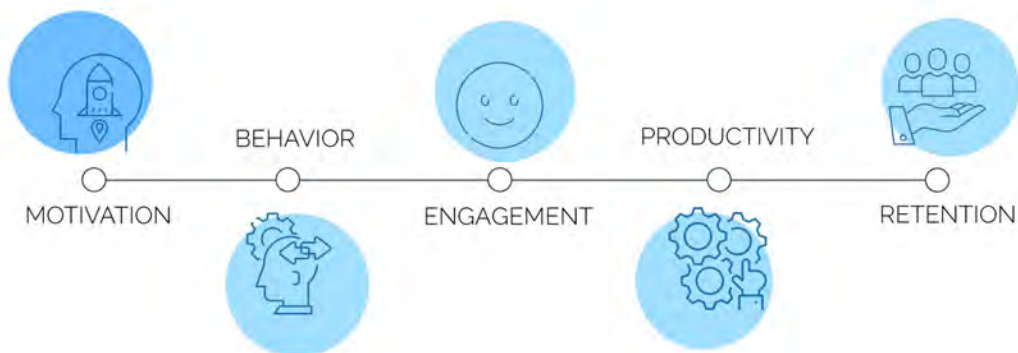
of employees don't understand how their work aligns with the company's strategic vision

Influence Motivator



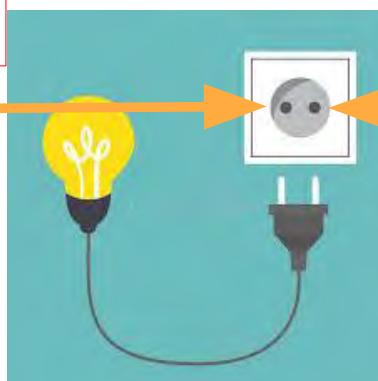
of employees want their opinions heard and want their managers to involve them in workplace decisions

Motivation Matters



Performing an action or behavior because you enjoy the activity itself. Motivation that comes from inside the individual.

Performing an action or behavior in order to receive an external reward or outcome. This type of motivation arises outside the individual.



$$HP = I + E$$

(High Performance = Intrinsic + Extrinsic)

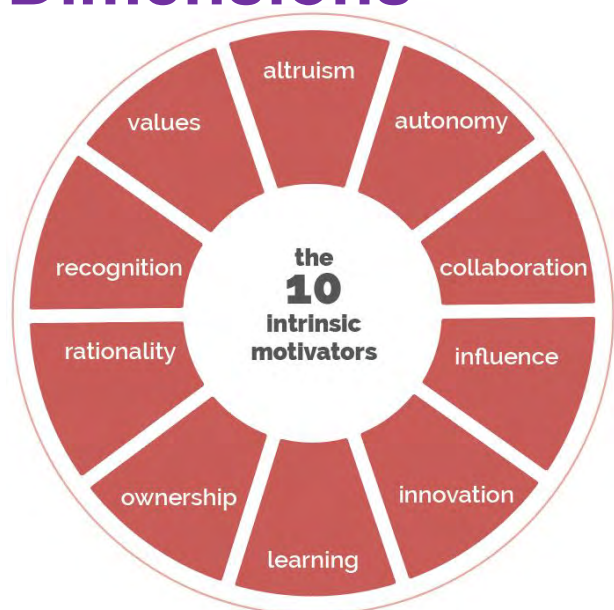
Ten Intrinsic Motivators

- **Values:** align with own beliefs and confidence in organizational mission
- **Learning:** acquire knowledge and master skills
- **Influence:** participate in decision-making, policies and procedures, goals
- **Recognition:** be valued/appreciated and be outwardly recognized
- **Innovation:** experiment with new ideas and use of imagination/creativity
- **Rationality:** think logical and make decisions based on facts
- **Autonomy:** work without much supervision and micro-management
- **Ownership:** be responsible for parts and seeing things through to the end
- **Altruism:** help coworkers and mentor younger colleagues
- **Collaboration:** work in a team-oriented environment

Motivation Dimensions

People are naturally motivated by these 10 dimensions...

Of these, **Learning & Recognition** have the greatest predictive impact on **engagement**. **Values & Learning** have the most impact on **retention**.



Understanding employee motivations
creates more engagement and loyalty, i.e.
a better *experience*, which leads to...
more productivity!

Business Benefits



Strategic Thinking

Instead of task-based focus, employees who are shown the strategy behind the tasks can begin to think along the company mission



Future Leaders

Employees are looking to grow and develop, and creating paths for them to do so will create loyal, intrinsically motivated employees



Better Decisions

The best decisions are made with the most accurate information, and employees are the ones who have laid that groundwork



Invested Employees

When employees are involved in business decisions, they are motivated to see the results of their work, and have higher morale overall



Cost Savings

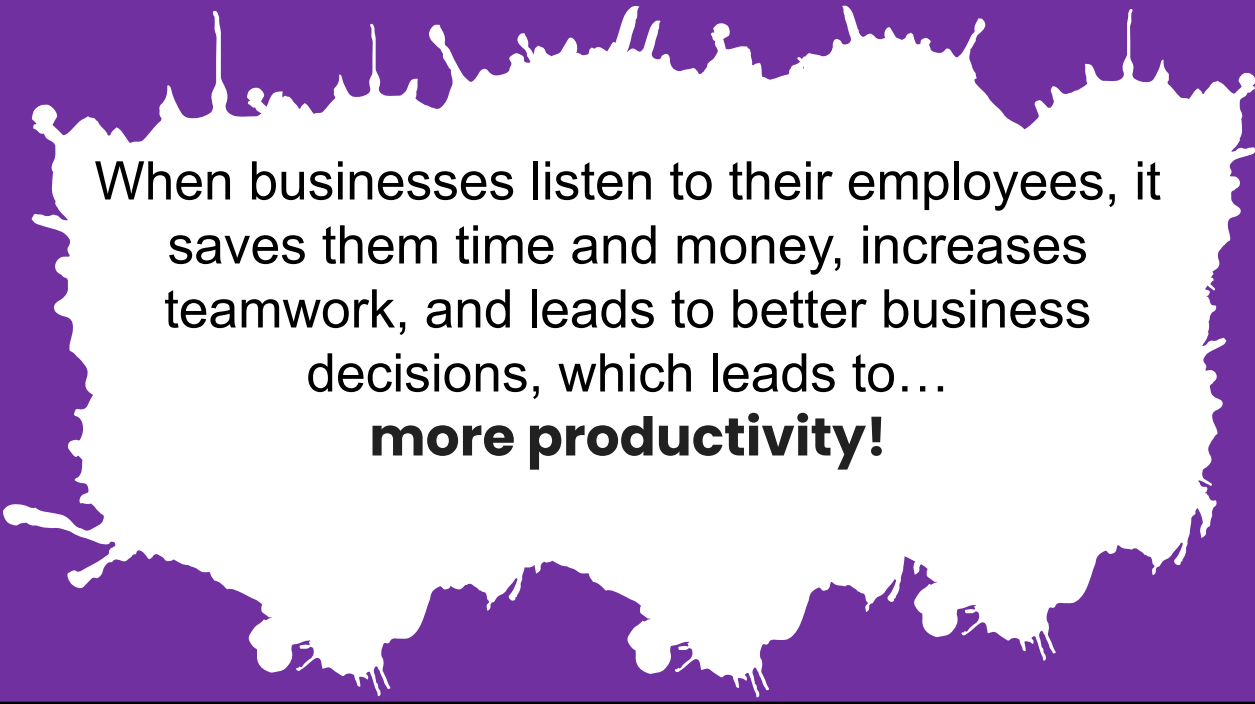
By tapping into the minds of employees, there's no need to outsource for company needs



More Teamwork

Employees working together create better results, and more input allows the best ideas to come forward





When businesses listen to their employees, it
saves them time and money, increases
teamwork, and leads to better business
decisions, which leads to...
more productivity!

To Create a Highly
Profitable, Experience-Led
Organization, Ask the Most
Important Question

What does the *customer* value? (Members AND Employees)

- **Economic.** *Will this waste my money? Will it provide good return for the cost? Could this hurt my business?*
- **Functional.** *Will this work and be reliable? Will I have to worry about it breaking?*
- **Social.** *What will others think of me? What brand do I belong to?*
- **Physical.** *Will this cause me great effort or stress?*
- **Psychological.** *Will I regret I did this? Will I be treated well?*



Break

Part 3

The How: Human-Centered Design and a Model for Governance and Change

Customer experience equals emotion,
which drives behavior, which drives
results.

Think about
your own
experiences
with
businesses!

Think about your own experiences

“I felt good about that.”

- Making it memorable

“I didn’t have to work hard.”

- Ease/Effort

“I accomplished my goal.”

- Success/Satisfaction

As loyal customers we are more likely to repurchase, more likely to recommend a brand and more likely to pay a **premium price**. As loyal employees, we are more likely to unlock discretionary effort and stay longer.

Mindset needed for human-centered design...



Empathy.

Step into someone else’s shoes, and see the experience we are trying to create *from their point of view*.

Design Thinking

“A human-centered approach to innovation that draws from the designer’s toolkit to integrate:

- the **needs of people,**
- the **possibilities of technology,** and
- the **requirements for business success.”**

—TIM BROWN, IDEO PRESIDENT & CEO

The Journey Map

Starter Tool

The Journey Map

Different customers might have different experiences with your product or service at different points in time.

By creating a customer journey map you can analyze the experience of different personas along every step of the journey.

Starter Tool

The Journey Map

First, choose a **persona**. Who is your target customer? Is it a client type you most want to see growth from (playing offense)? Is it a client type you are in danger of losing (playing defense)? Is it an employee type or other kind of stakeholder (partner onboarding experience, etc.)?

Starter Tool



Using a **Persona**: Junior Sales Exec.

Age: 32
Location: Arkansas
Job: Senior Sales Executive
Status: New Hire

Key Traits

Tim made the decision to accept Vistra Energy's job offer because he is looking forward to learning about a new industry while successfully utilizing his key traits:

He is an Achiever. Tim is extrinsically motivated and driven to beat his own track record, *and win*. He has consistently over performed in many areas of his life, and enjoys the challenge.

He Likes People. He has a positive attitude and has no problem with social interactions and understands how to read people in such a way as to discern a target or business prospect.

He's Curious. He likes to get to the bottom of a problem and be prepared- by understanding how to ask the right questions that enable him to suggest the right solution. He enjoys learning and he likes to consume information that can be helpful.

He's a Great Communicator. He is easily able to communicate through virtually any medium and position himself in a positive and convincing way. To him, it is his most important tool in his toolbox for closing a sale.

Tim's Story

Tim is a semi-experienced sales executive with a proven track record of meeting or exceeding his quarterly and annual objectives. His career in sales began in his second job out of college where he worked as a sales rep in a manufacturing company and had a mentor who taught him the importance of being a big picture thinker and thoroughly understanding how the sales organization's performance affects the company as a whole. He approaches his job each day with a clear focus - helping customers solve their problems, providing straight answers and clear insights, while not losing sight on closing the sale.

Tim is well liked, respected, and well connected. He is self disciplined and likes to set goals for himself and others. People gravitate to Tim, as he has perfected the art of listening, relates easily to others through personal experiences and as such, makes each relationship count for the long haul. Not surprising, the result is that Tim has a roster of long-term personal friends he interacts with regularly and works diligently to maintain these trusted relationships.

He is also well informed. Tim is the person who understands that information is a key necessity for people to make a decision. Understanding why things work as they do is how he is able to work with customers to not only to understand their unique problems but also to provide recommendations based on personal experience.

Tim is health conscious, active, deeply engaged in his community, married, owns a home and is expecting his first child within the year.

WHAT MOTIVATES TIM to ENGAGE:

Learning
Collaborating
Rationality

Pain Points

- Unclear goals & objectives
- Inaccurate information or inability to capture important customer insights
- Internal obstacles, processes that keep him from helping the customer
- Lack of urgency from others
- Things that don't work as they should- from internal sales tools, to technology- or even the product he is selling
- Inauthenticity of any kind
- Lack of measurement that keeps from showing progress
- Negativity
- Poor, or lack of communication
- Lack of integrity

The Journey Map

Starter Tool

It's critical to understand each step for the target persona. After the journey you choose to map is complete, categorize it into different **stages**.

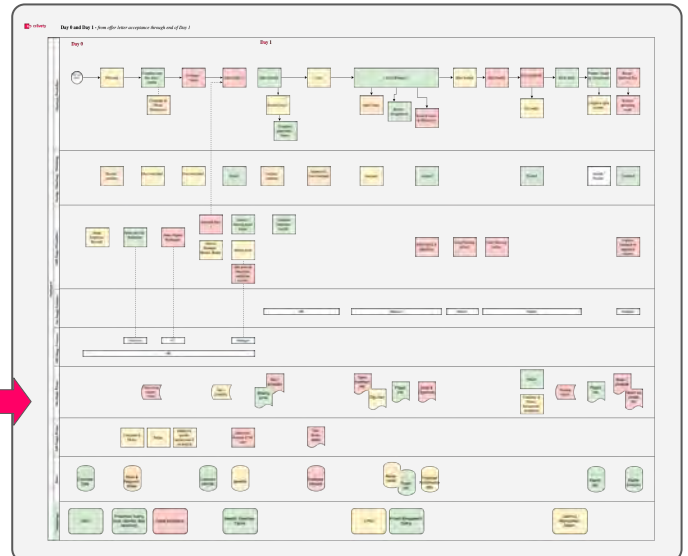
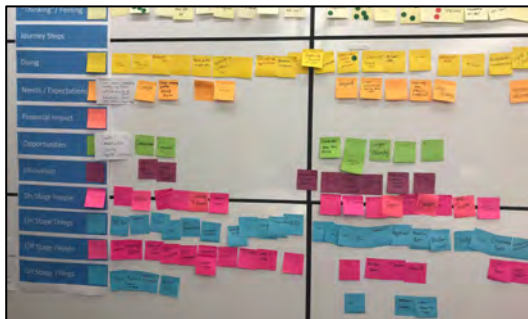
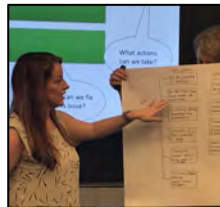
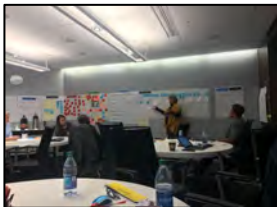
Map out **steps** and **touchpoints** to understand each situation your persona experiences, and what you want that persona to see, hear, do, and *feel*.

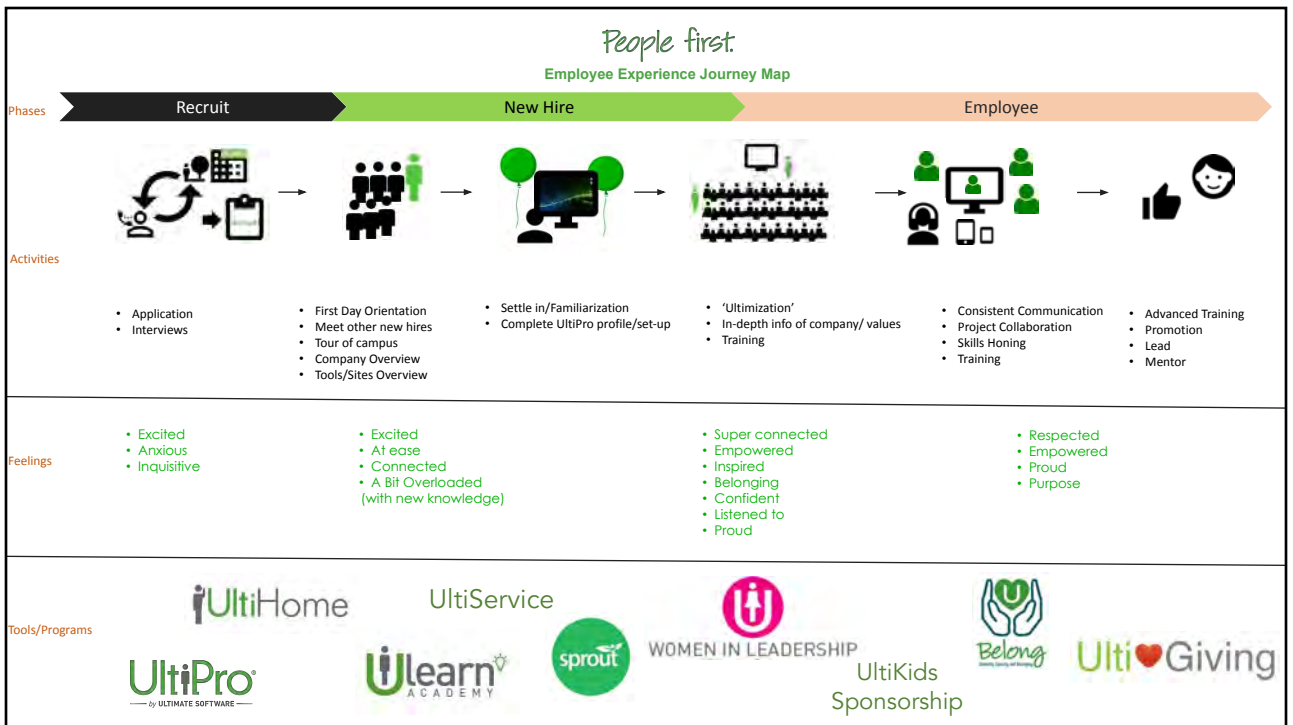
From customer to employee journeys, design your business experience around the moments that matter most. This is done through the **journey mapping** tool.

EMPLOYEE JOURNEY		DAY ZERO: EMPLOYEE NEEDS	DAY ONE: EMPLOYEE NEEDS
FOCUS	THOUGHTS/ FEELINGS		
	ACTIONS (DOING)		
	NEEDS/ EXPECTATIONS		
REALITY	BUSINESS OPPORTUNITIES		
	ON STAGE (PEOPLE, THINGS)		
	OFF STAGE (PEOPLE, THINGS)		
	TECHNOLOGY		
	DATA		

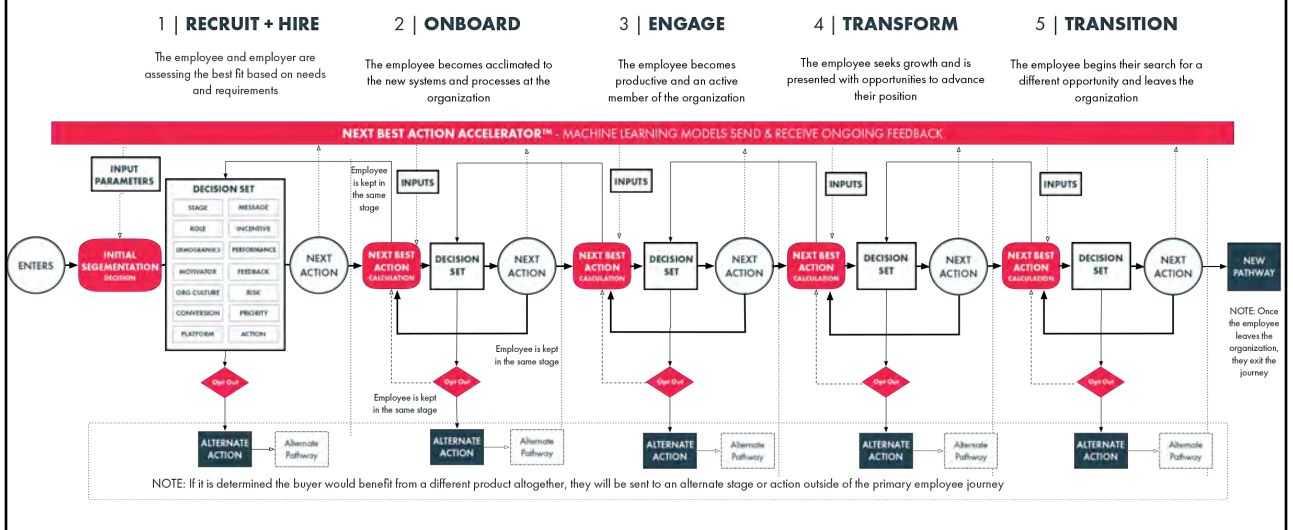
A crucial mindset for human-centered design...

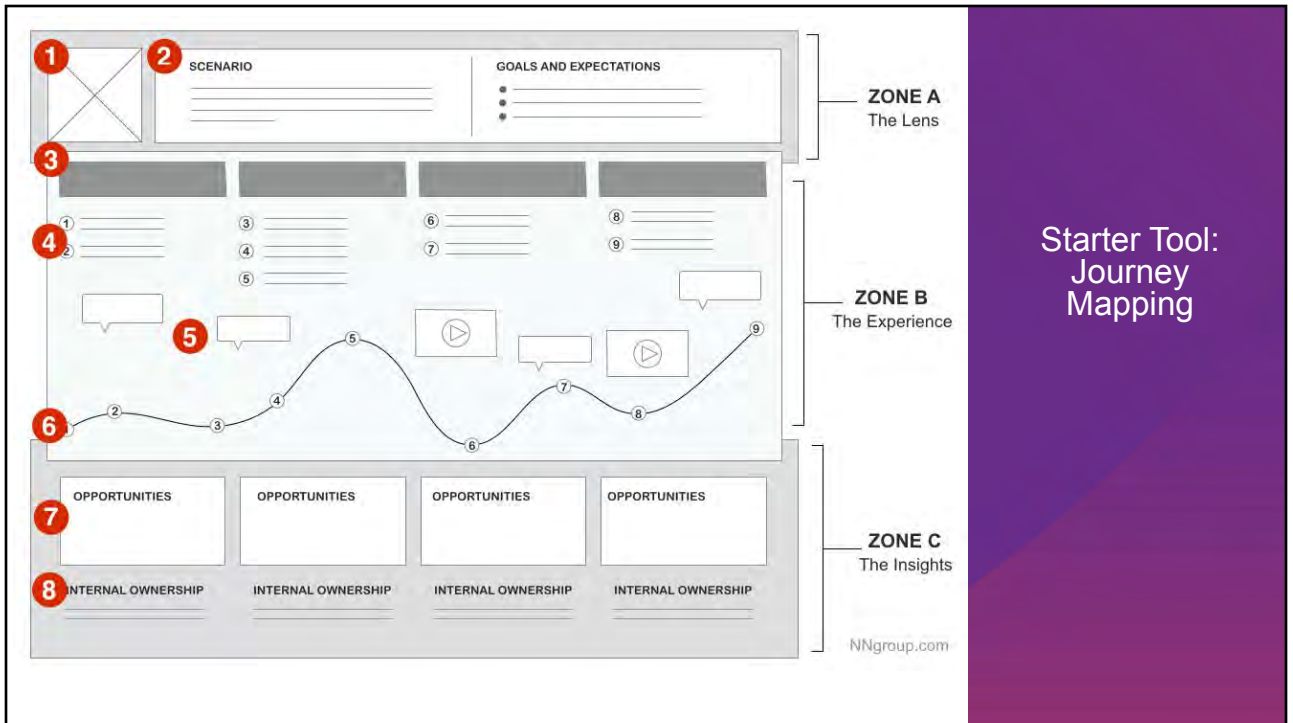
Step into someone else's shoes. See the experience you're trying to create *from their point of view*.





Employee experience workflows





Understand which experiences most affects loyalty

Ex. Asset Management Firm



Empathy Map Canvas

Designed for:
Designed by:
Date:
Version:

1 WHO are we empathizing with?
Who is the person we want to understand?
What is the situation they are in?
What is their role in the situation?

2 What do they need to DO?
What do they need to do differently?
What job(s) do they want or need to get done?
What decision(s) do they need to make?
How will we know they were successful?

7 What do they THINK and FEEL?

PAINS
What are their fears, frustrations, and anxieties?

GAINS
What are their wants, needs, hopes and dreams?

3 What do they SEE?
What do they see in the marketplace?
What do they see in their immediate environment?
What do they see others saying and doing?
What are they watching and reading?

4 What do they SAY?
What have we heard them say?
What can we imagine them saying?

5 What do they DO?
What do they do today?
What behavior have we observed?
What can we imagine them doing?

What other thoughts and feelings might motivate their behavior?

Some Inspiration

The Miles & Stockbridge Story

Professional
Services Setting



Miles & Stockbridge

500+ lawyers and
“non-lawyers”

Founded in the
1950s.

Largest law firm in
Maryland and top
firm in the
Mid-Atlantic.

Revenue
flattening was in
2016 with severe
downward rate
pressure.

The Challenge: An Urgent Need for Change Among a Change-Resistant Culture

- Decentralized corporate structure with a weak board (by design).
- Excellent critical thinkers/natural skeptics (“show me the money”). Trained to look for precedent first
- Research on lawyer personalities show they score low on resiliency (the degree to which a person bounces back quickly from criticism, rejection or setbacks -- Dr. Larry Richard)

Miles & Stockbridge

500+ lawyers and
“non-lawyers”

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downward rate
pressure.

The Challenge: Urgent Need for Change Among a Change-Resistant Culture

- Lawyers feel pressure to quickly show expertise and have answers for clients, when clients often want more active listening.
- Most influential audiences are peers and clients
- Incorporating a “co-design” approach to any change management is mission critical

Miles & Stockbridge

500+ lawyers and “non-lawyers”

Founded in the 1950s.

Largest law firm in Maryland and top firm in the Mid-Atlantic.

Revenue flattening was in 2016 with severe downward rate pressure.

First, a Little “Strategy”

Rainmakers as Allies

The Client Advisory Board



The Power of Peer Pressure

+

Influential Clients

Why Law Firms Get Fired



When a client's workflow slows down, **nine times out of 10 it's because of a client service issue.**

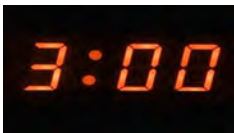
LAW360 "Why GCs Dump Their Law Firms," published Oct. 13, 2016 on Law360.com

Next, Some Research

What Became Center Stage



"By the end of the year, the client's appreciation for us was even greater. I feel this visit set much of that up."



"It was a stressful period for everyone but we were able to arrange a final deal that did not result in any jail time and allowed the son to continue in his field of practice."



"I know the client very much appreciated the timely, seasoned, and human counsel. In my mind, these services were very much in the extra mile category."

Uncovering the
"Voice of the
Client"

Pro Tip:
When it comes
to change,
data are
important, but
stories are even
better.

What Became Center Stage



"For our client, the fire was just a news cycle away. They were not aware these extra services even existed, and were very appreciative of our efforts to provide specific proposals and staffing solutions."



"The corporate litigation was extremely complex. In the middle of all of it, we took the time to listen and act on what his son liked. His reaction later was so appreciative. Best \$400 we have invested in the relationship, and far better than other impersonal things we have offered in the past."

Uncovering the
"Voice of the
Client"

When it comes
to change,
data are
important, but
stories are even
better.

What do our clients see when they observe the firm in action? How do we make them *feel*? Together, these are the client experiences that define, in their minds, our true brand. The key to enhancing that brand is to exceed their expectations, in every area.



Start asking
questions.

Prototype a
framework for
change.

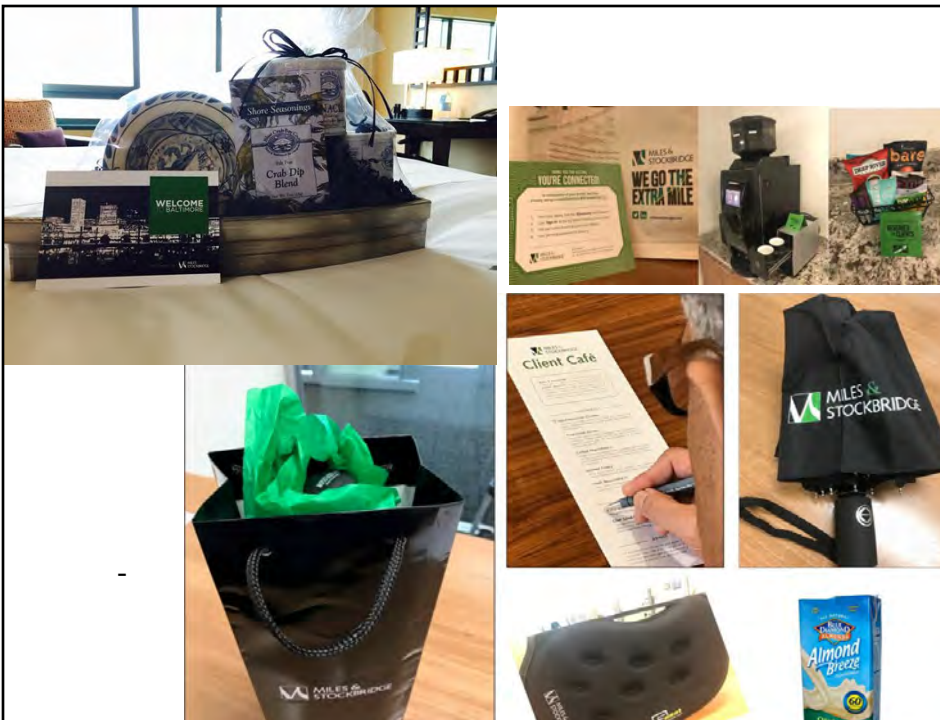
Create an
internal
governance
structure and
cross-functional
group of
empowered
people to
innovate

Creating the Ultimate Client Experience



Adopting the principle of discretionary effort became a rallying cry:

WE GO THE EXTRA MILE



Multiple, reinforcing "moments that mattered"



Additional
pressure points
for change:

Tying metrics to
compensation



Additional
pressure points
for change:

Tying metrics to
compensation

Core Elements of the M&S CX/EX Model

Client Advisory Board

Voice of the Client video series (CX Center on the portal) + **Voice of the Client Survey** (early warning system for revenue erosion)

Ongoing Training/Workshops: Empathetic communications; transforming relationships through active listening and “presence,” curiosity, compassion, and the art of inquiry (“**Mile Marker**” coursework)

Five-Star Service for Distinct Client Journeys: (Caller Experience, Visitor Experience, New Client Intake Experience; Matter Management Experience; Service Ambassador Program)

Candidate Experience: New onboarding journey in collaboration with HR, IT, marketing, and practice group leaders

M&S Shared Service Program (gestures of gratitude as cross-selling opportunity)

VIP Program (top 20 clients)

ClientMatch

Social Impact Report

Revamped Holiday Gift Program + Client Anniversary Gift Program

Peer-to-peer recognition and rewards program

CX metric in annual evaluations

The Miles & Stockbridge Client Experience and Employee Experience Model was published by Wilmington Press as case study in the 2018 book, “Innovations in Client Experience.”

Start with Business Questions

Customer measures and metrics reflect how how your firm/organization (your brand) is becoming customer-focused.

The ability to measure progress and results is a critical tool for your CX efforts.

-

Start with the business questions, not the experience you want to create.

Remember, customer/employee experiences are a means to an end.

Your business results are the desired end.

Start with Business Questions

“How will I know the benefit of creating a customer-centric organization?”

Growth and new business
Revenue enhancement (repurchase)
Cost reduction (reduce necessity to spend marketing, optimizing processes)
Customer retention

-

Start with the business questions, not the experience you want to create.

Customer/employee experiences are a means to an end.

Your business results are the desired end.

Start with Business Questions

“How will I measure how customers (or clients) feel about my organization?”

Customer Satisfaction
Customer Advocacy (are they telling others)
Customer Loyalty (are they spending more, paying premium price and staying longer)

-

Start with the business questions, not the experience you want to create.

Customer/employee experiences are a means to an end.

Your business results are the desired end.

Start with Business Questions

“How can I target issues that create negative customer experience and define new ways to create differentiating experiences?”

Touchpoints: Action and conversion rates, transaction amount, frequency and efficiency, service rates, issue resolution.

Relationships: Exceed expectations, co-create new products and services, care for the customer's lifecycle needs.

Start with the business questions, not the experience you want to create.

Customer/employee experiences are a means to an end.

Your business results are the desired end.

Start with Business Questions

“What do customers need from us and how do they achieve their goals?”

Behavioral and Psychological:

- Audience of one (personalize things, first by persona, then by individual)
- Wants and needs
- Channels (where they interact)
- Behaviors (how they interact now vs. how they *want* to interact)

Start with the business questions, not the experience you want to create.

Customer/employee experiences are a means to an end.

Your business results are the desired end.

Dig Deeper: Defining and Tracking Success for Experience

- What are the operational measures that define success?
- What are the measures that we want to monitor for each touchpoint of the journey?
- What would our clients use as a measure or metric for us?

Dig Deeper: Defining and Tracking Success for Experience

- How do we measure trust, relationship strength and other intangibles?
- What indicates we are providing an excellent experience? How will we track emotion?
- How will we define financial success for our experience changes? What baselines do we need to identify?

Clarifying Terms: Measures, Metrics and Value



Experience Measures

- Things you can count
- Measures the behavior or action
- More actionable

Examples:

Calls/clicks to resolve, time to renew contract, social media mentions (+/-), product complaints, feedback rates, referrals

Clarifying Terms: Measures, Metrics and Value



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Experience Metrics

- Reflects perception
- Reflects expectation, experience and emotion
- Less actionable

Examples:

NPS, Customer Effort Score, Brand Index

Clarifying Terms: Measures, Metrics and Value



Experience Measures

- Things you can count
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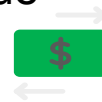


Experience Metrics

- Reflects perception
- Reflects expectation, experience and emotion
- Less actionable

Examples:

NPS, Customer Effort Score, WOM Score, Brand Index



Experience Value

- Financial impact
- Experience translated to measurable value
- Results that help prioritize and drive actions

Examples:

Cost to serve/acquire, revenue, share of wallet, customer lifetime value, retention

Closing Thought on How to Approach Employee Experience:

- Treat Employees the Way You Want Your Customers to Be Treated.

For **employees**, use measures and metrics to determine how every employee is executing on your brand promise

CX Measures and metrics are the feedback loop to:

- Maintain alignment
- Focus and prioritize efforts
- Track progress
- Understand impact of change to the experience





Our Mission:

Deliver the friendliest, cleanest
and most convenient customer experience,
by first being the best place to work.



Thank you

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What is the Business Learning Institute?

BLI is a training affiliate of the AICPA-CIMA. BLI's mission is to deliver competency-based courses, content and community that enhance learning and foster organizational and executive leadership.

BLI has grown into the largest provider of on-site training in the country. Pam and the Customized Learning Solutions team have grown the business in three core segments – Corporate, Firm and Government.

The BLI Curricula

Today's business environment demands the need to gain competencies and share strategic knowledge. BLI delivers competency-based curriculum, courses, content, and community to enhance learning and grow intellectual capital for organizational and executive leadership.

These soft skills are essentially people skills – the non-technical, intangible, performance skills that determine your strengths as a leader, manager, and team member.

STRATEGIC MANAGEMENT

Strategic conversation reflects the dynamics between the organization and its environment. The closer the language reflects current and potential customer dynamics, the higher the company's profit potential.

LEADERSHIP DEVELOPMENT

Great leadership is one of the most valued of all human activities. Modern myth holds that "leaders are born not made," but leadership is a set of observable and learnable practices - it is the process people use when they bring out the best in others and themselves.

BUSINESS MANAGEMENT

As the business world moves at an incredible pace, keeping up is a key to success. Today's financial managers must be able to translate strategy to operational and corporate growth.

TECHNOLOGY AND COMPUTER SKILLS

Harness the technology you use every day to make your business life easier and allow you to work smarter.

PERFORMANCE MEASUREMENT MANAGEMENT

Executives and managers must effectively transform their firms or companies into high performance organizations and progressively identify and develop the appropriate core competencies and link them to their business strategies.

COMMUNICATION SKILLS

Many people in the business field cannot communicate effectively and, even more damaging, don't realize it. Success is not defined solely by a product line or service - it relies on relationships formed and maintained through skillful communications. Your competitors know this. Do you?

TECHNICAL EXPERTISE

Keeping up with technical competencies is a core business requirement for financial professionals. Staying attuned to the latest changes, updates, and regulations are necessary components to staying competitive in an ever-changing business environment.

Please note that many programs in this catalog are available in webcast format. Contact a BLI Customized Learning consultant if you are interested in a webcast.

Breakout 1A. Upskilling Brought on by COVID

As a variety of forces continue to disrupt the marketplace, it is mission-critical that you continually develop your leadership skills. The aftermath of the pandemic, talent challenges, and economic shifts call for leaders who not only adapt to changes in their environment but are able to lead themselves and others through them. This session will focus on three opportunities for leaders to upskill and take their leadership to the next level. Expand your view of leadership, grow your emotional intelligence, and become more innovative to deliver your best value as a leader.

Jon Lokhorst, CPA
Lokhorst Consulting

Jon Lokhorst, CPA, ACC, is a leadership coach, keynote speaker, corporate trainer and author of the new book “Mission-Critical Leadership: How Smart Managers Lead Well in All Directions.” He works with organizations to develop leaders everyone wants to follow, build teams no one wants to leave, and deliver exceptional results. Before launching Lokhorst Consulting LLC, Jon enjoyed a 30-plus year career as a CPA, CFO and organizational leader. He is recognized by the International Coach Federation as an Associate Certified Coach. He also serves as adjunct faculty in the School of Business and Nonprofit Management at North Park University. Jon is a member of the National Speakers Association and serves as Vice President of the Minnesota chapter.

Upskilling Brought on by COVID

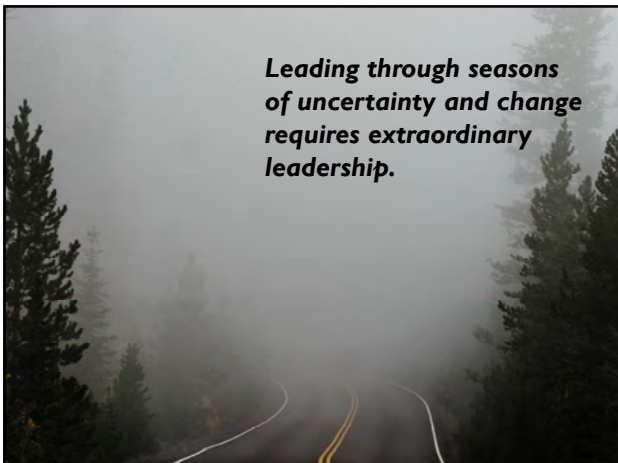
Moderator: Jon Lokhorst, CPA, PCC
CPA Educators Conference
March 24, 2022



1



2



***Leading through seasons
of uncertainty and change
requires extraordinary
leadership.***

3

Jon Lokhorst, CPA, PCC



4

Top Skills of 2025

Analytical thinking and innovation

Active learning and learning strategies

Complex problem-solving

Critical thinking and analysis

Creativity, originality and initiative

Leadership and social influence

Technology use, monitoring and control

Technology design and programming

Resilience, stress tolerance and flexibility

Reasoning, problem-solving and ideation



—Future of Jobs Report, World Economic Forum

5

Today's Focus on Upskilling

1. Lead well in all directions.
2. Develop your emotional intelligence.
3. Innovate by identifying your customer's problem to be solved.
4. Continually increase your capacity to learn.



6

Lead Well in All Directions



7

Expand Your View of Leadership

- Lead up to your boss
- Lead across among your peers
- Lead down to your team members
- Lead yourself first



8

**If you want others to see
you as a leader...**



9



10



11

Coach Yourself!



Identify an opportunity to show up as a leader by taking initiative.

 **LOKHORST**
CONSULTING

12

Develop Your Emotional Intelligence



13

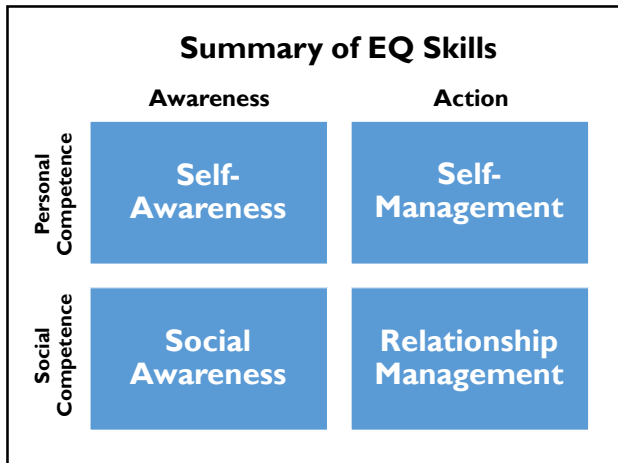
What is emotional
intelligence (EQ)?

14

- Understanding the emotional makeup of yourself and the people around you.
- Use that understanding to manage yourself and your relationships with others.


--Daniel Goleman,
Harvard Business Review

15




16

Assess Your EQ



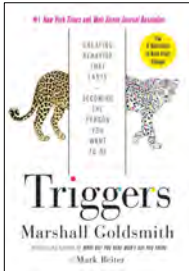
Emotional Intelligence Appraisal®
ME EDITION

Emotional Intelligence 2.0
By Travis Bradberry & Jean Greaves

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17

Identify Your Triggers



“A behavioral trigger is any stimulus that impacts our behavior.”

--Marshall Goldsmith

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How Triggers Work

TRIGGER →

Impulse>Awareness>Choice →

BEHAVIOR

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Coach Yourself!



What trigger typically keeps you from showing up as your best self as a leader?



20

Innovate by Identifying Your Customer's Problem to be Solved



21

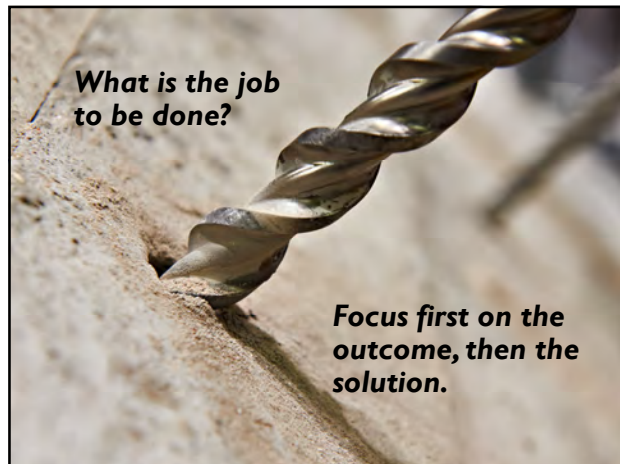
What is the job to be done?

“When we buy a product, we essentially ‘hire’ something to get a job done. If it does the job well...we hire that same product again. And if the product does a crummy job, we ‘fire’ it and look around for something else we might hire to solve the problem.”

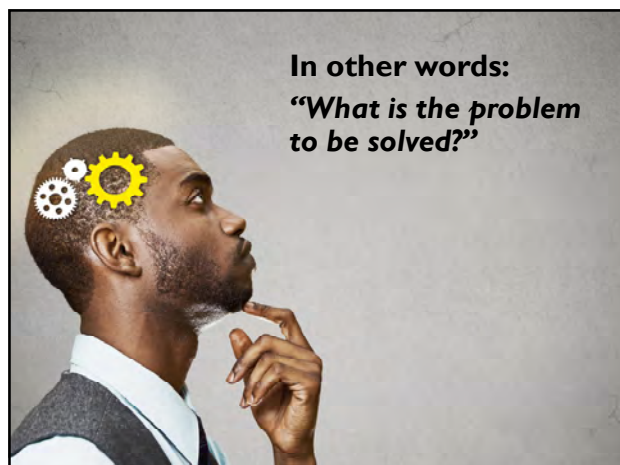
—Clayton Christensen (1952-2020)
Author, *The Innovator's Dilemma*



22



23



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**What is the
problem to be
solved?**



25

**How do you determine the
problem to be solved?**

- *Industry research*
- *News stories*
- *Staff discussions*
- *Client/customer surveys*
- *Prospect meetings*
- *Niche interviews*
- *Keen observation*



26

**What is the
problem to be
solved?**



27

Coach Yourself!



How can you better identify your customer's problem to be solved and start working on meaningful solutions?



28

Continually Increase Your Capacity to Learn



29



Masaru Ibuka
Founder, Sony

30

Accelerate Your Learning

- *Practice self-reflection*
- *Seek feedback from others*
- *Turn insight into action*
- *Teach others*
- *Create a development plan*



31

Coach Yourself!



What's your next step to put into practice what you've learned today?



32



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**LOKHORST
CONSULTING**

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 Website: lokhorstconsulting.com



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***Lead well and
multiply your impact!***



35

Breakout 1B. Future of Learning

The world has certainly turned upside down in the last 2 years. Think back to March 2020 – could you have imagined that Covid would have affected you and your CPE program to this extent? This is only the beginning. In this session, we'll dissect the effect the pandemic has had on professional education in the past year and propose solutions for your organization and your CPE program.

Russell Collingworth

ProDio

Russell is an experienced business and finance professional, speaker and facilitator with an MBA in Strategy from Simon Fraser University, and he has delivered in-person professional development and corporate training courses for over 8 years.



THE FUTURE OF LEARNING

A CPE PERSPECTIVE

Russell Cullingworth
President, ProDio Audio Learning Inc.

EXCEL HACKS

YOU DON'T KNOW
ABOUT



Is Miss Excel the future of Professional Education?

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President, ProDio Audio Learning Inc.



TO AVOID ANY CONFUSION:

COMPARATIVE TERMINOLOGY

CPE = CPD = PD

SOCIETY = ASSOCIATION = INSTITUTE

STATE = PROVINCE = JURISDICTION

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Survey

How are you feeling about the future of your CPE program?



Optimistic/Excited



Comfortable



Somewhat Concerned



Very Concerned

WHAT JUST HAPPENED?

How has the Covid affected your CPE program in 2020 and 2021?



Who am I?

**An extraverted Entrepreneurial
ex-Accountant with a passion for
learning through storytelling.**



LET'S STEP BACK A BIT AND REFLECT...



**WHY A CPE
REQUIREMENT?**

WHY?

California Board of Accountancy

“Qualifying Continuing Education (CE) Acceptable CE must be a formal program of learning which **contributes directly to the professional competence** of the licensee in public practice and is consistent with the CBA educational program requirements. It is your responsibility to select acceptable CE courses.”

California Board of Accountancy” License Renewal Handbook, III. Continuing Education” Revised 2/25/2021

WHY?

CPA British Columbia

“Professional Competence: Rule 203 of the CPABC Code of Professional Conduct may require a member to complete more than the prescribed minimum number of CPD hours **to maintain the level of professional competence necessary for the work in which they are engaged.**

<https://www.bccpa.ca/member-practice-regulation/continuing-professional-development-cpd/cpd-requirements/>

WHY?

CPA Ontario

“The core purpose of mandatory CPD requirements is to help members meet the obligations under Rule 203 of the CPA Code of Professional Conduct **to maintain professional competency**.

Members should use their professional judgment when selecting relevant and appropriate CPD to meet their regulatory Requirements.

CPA Ontario, “A Simple Guide to CPD Requirements”, November 2021

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WHY?

NASBA Registry Statement on Standards for CPE Programs

“2.1 Professional Competence. All CPAs should participate in learning activities that **maintain or improve their professional competence.**

Selection of learning activities should be a thoughtful, reflective process addressing the individual CPA's current and future professional plans, current knowledge and skill level, and desired or needed additional competence to meet future opportunities or professional responsibilities, or both.

WHY?

INTERNATIONAL CODE OF ETHICS FOR ACCOUNTANTS

Fundamental Principal: **Professional Competence and Due Care**

“Maintaining professional competence requires a continuing awareness and an understanding of relevant technical, professional and business developments. Continuing professional development enables a professional accountant to develop and maintain the capabilities to perform competently within the professional environment.

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WHY?

Continuing Professional Education is about

ETHICS

Is the Profession taking enough care
and oversight to meet this
Professional Competence requirement?

Remember the good ol' days?

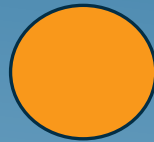


Survey

To what extent do you see **in-person CPE and conferences** making a comeback as part of your CPE program?



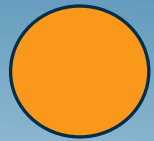
25%



50%



* conferences specifically



75%



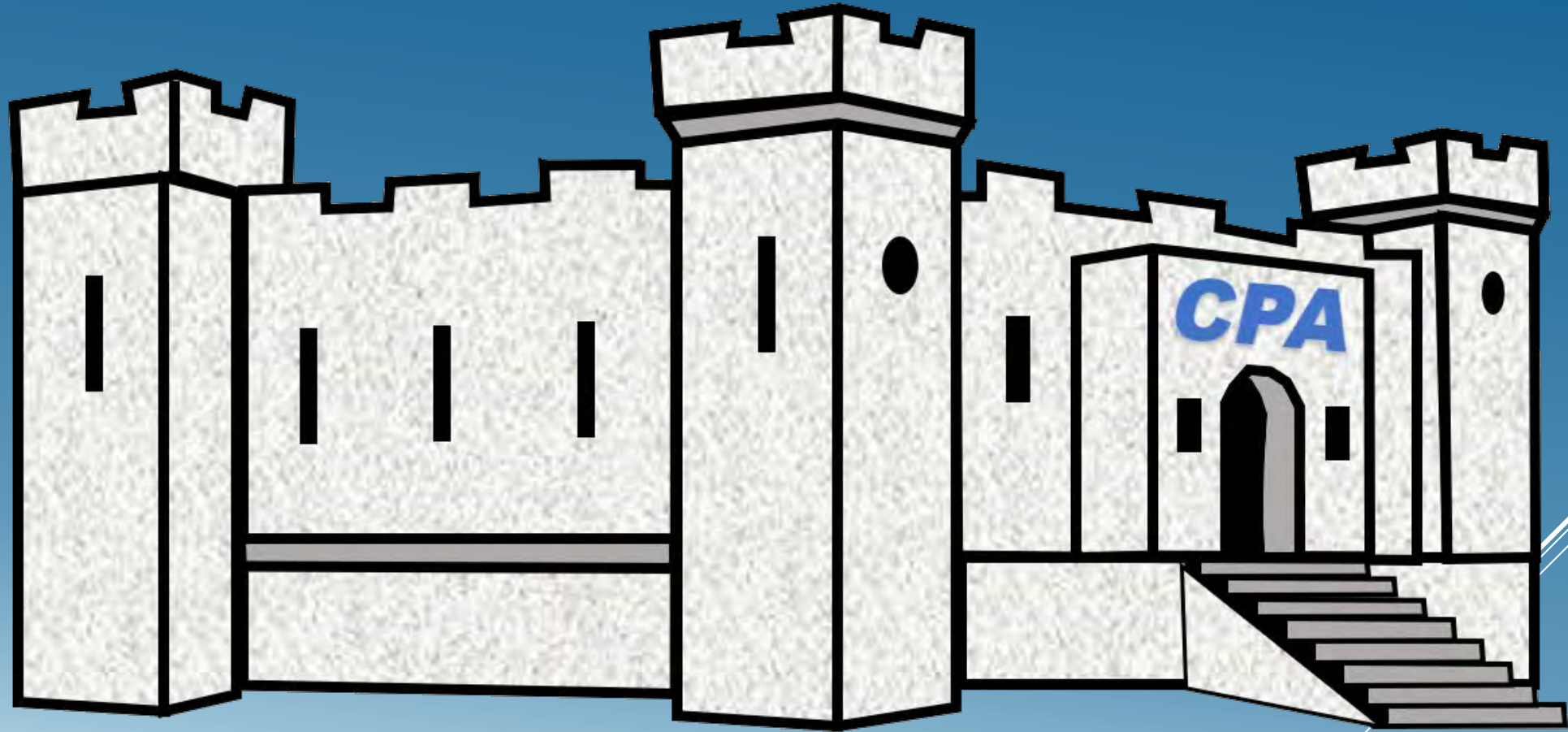
100%

Survey

"I'm very excited to see how excited individuals are to go back to in-person extracurricular social activities [e.g. sports events/games, dining/restaurants, and parties/pubs]. What I'm not sure of as yet, is if this level of excitement to be "in-person" will translate into going to "in-person" learning sessions.

Not having clarity on how human behavior will unfold in this realm makes it more challenging to plan out our programs for the upcoming seasons. And given that "in-person" sessions carry higher overhead costs and require being locked in before having a clear sightline to actual demand, fingers are anxiously drumming to see what will actually occur."

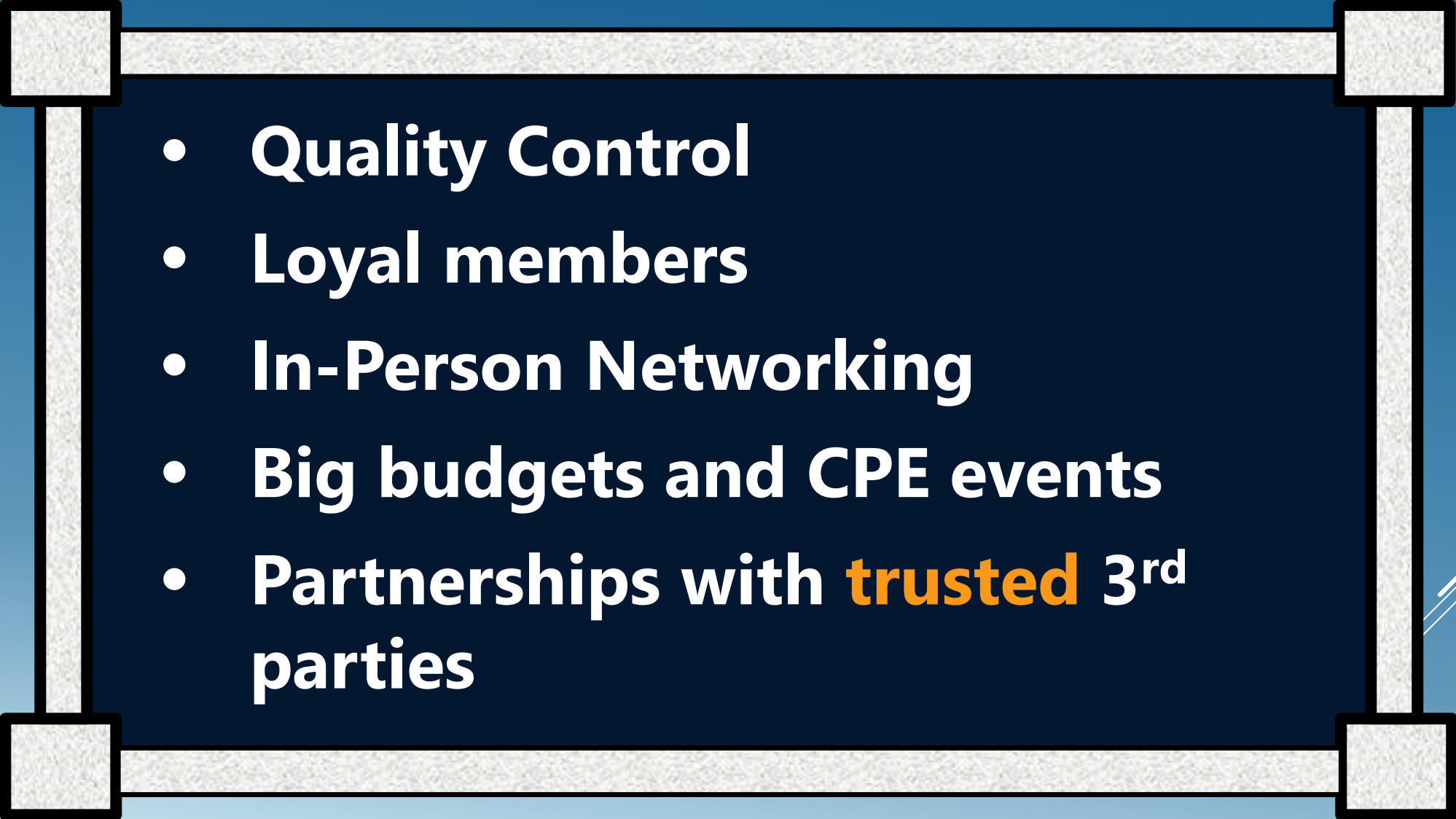
THE FORTRESS



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The way things were **INSIDE** the Fortress:

- 
- **Quality Control**
 - **Loyal members**
 - **In-Person Networking**
 - **Big budgets and CPE events**
 - **Partnerships with **trusted** 3rd parties**

2020/2021 Response to Covid

INSIDE THE **FORTRESS**



Switch to Online Courses

Target New Markets

Acquisitions

LMS Implementation

Offer Free Content

**HAVE I MISSED
ANYTHING?**

Survey

What do you think is the **greatest threat** to your CPE program?

- Reduced corporate budgets
- Private sector competition (online learning)
- Competition from other professional Associations
- Oversupply – prices driven down



OUTSIDE THE FORTRESS



OUTSIDE THE FORTRESS

THINKIFIC – AUG 2020

“The United States and Canada saw a combined growth rate of 691% compared to course creation in the 6 months preceding COVID-19.”

<https://www.thinkific.com/blog/online-course-industry-trends-covid-19/>

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OUTSIDE THE FORTRESS

THINKIFIC – AUG 2020

“Arts & Entertainment courses exploded by a mammoth **2108%**

Education came next with a growth of **881%**”

<https://www.thinkific.com/blog/online-course-industry-trends-covid-19/>

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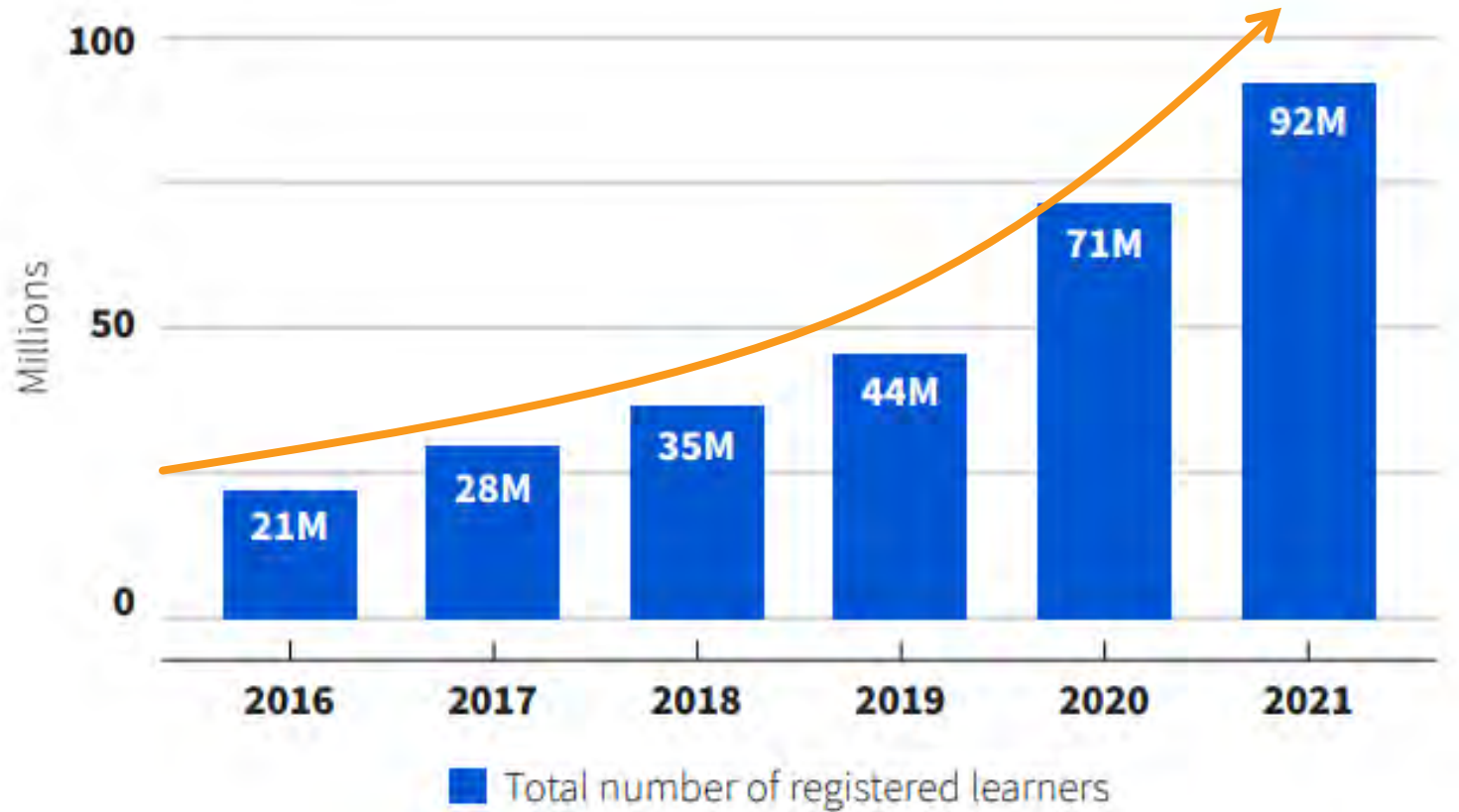


OUTSIDE THE FORTRESS

Coursera 2021 Impact Report

REGISTERED LEARNERS

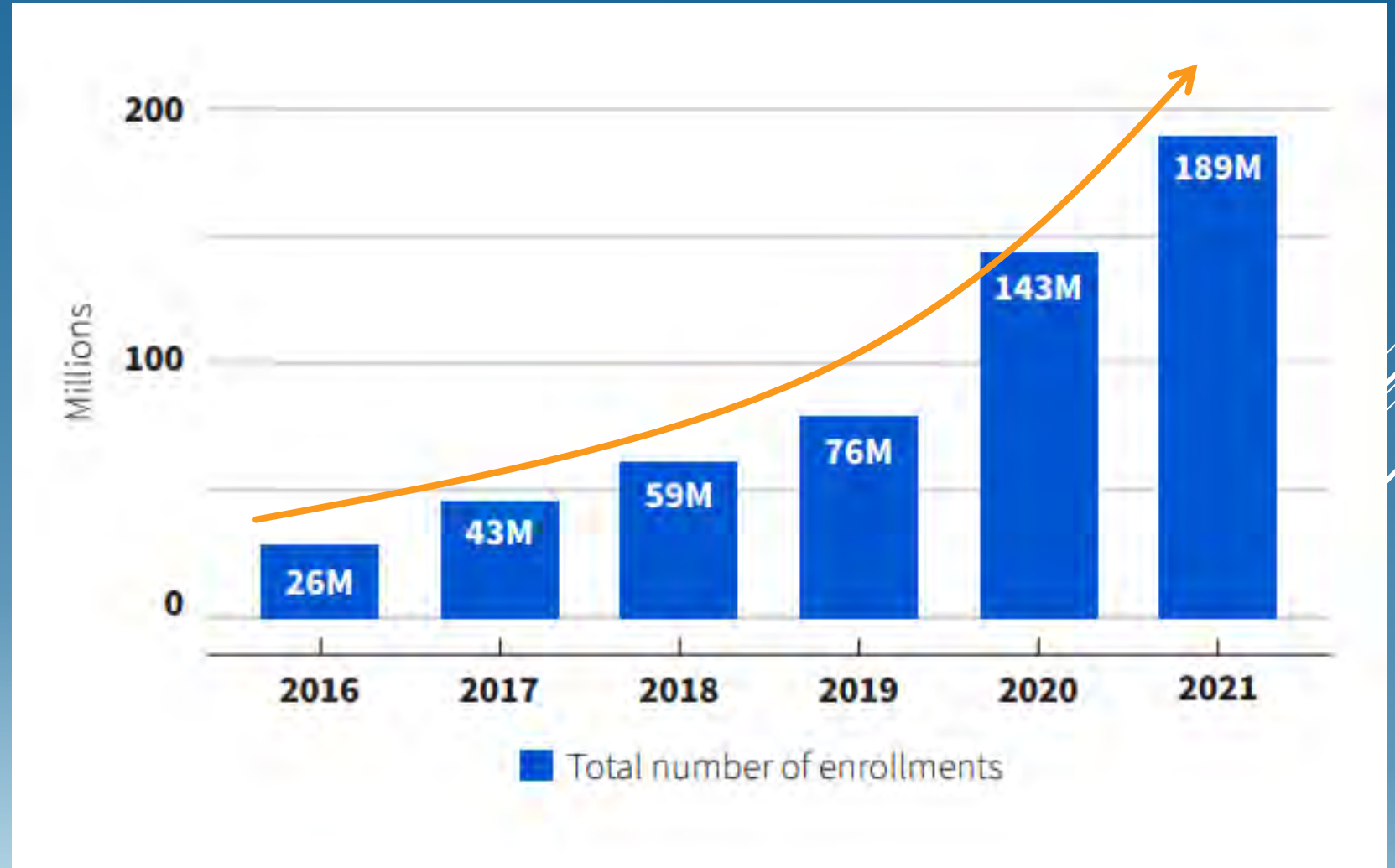
The demand for online learning on Coursera continues to outpace pre-pandemic levels.



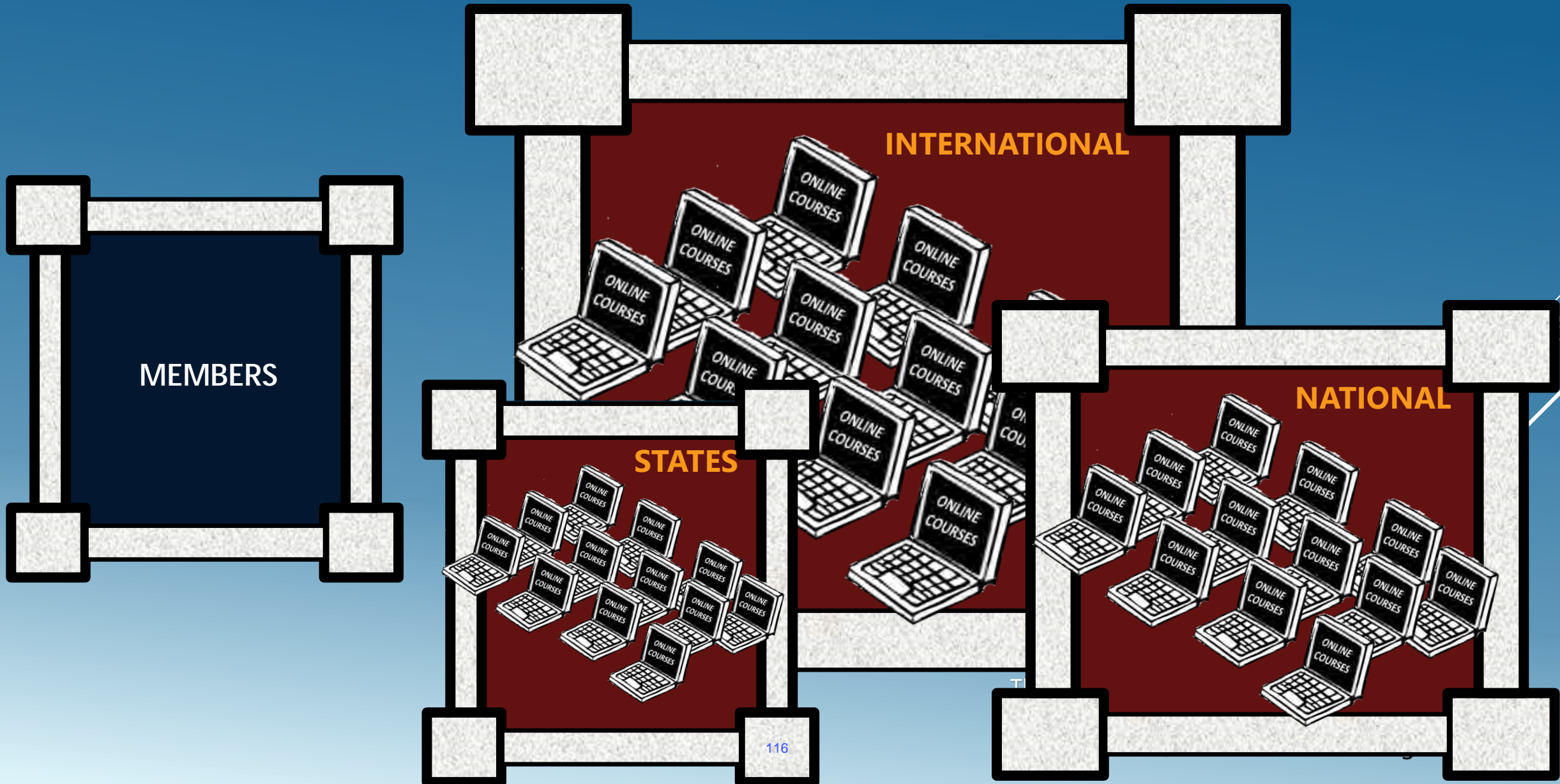
OUTSIDE THE FORTRESS

Coursera
2021 Impact Report

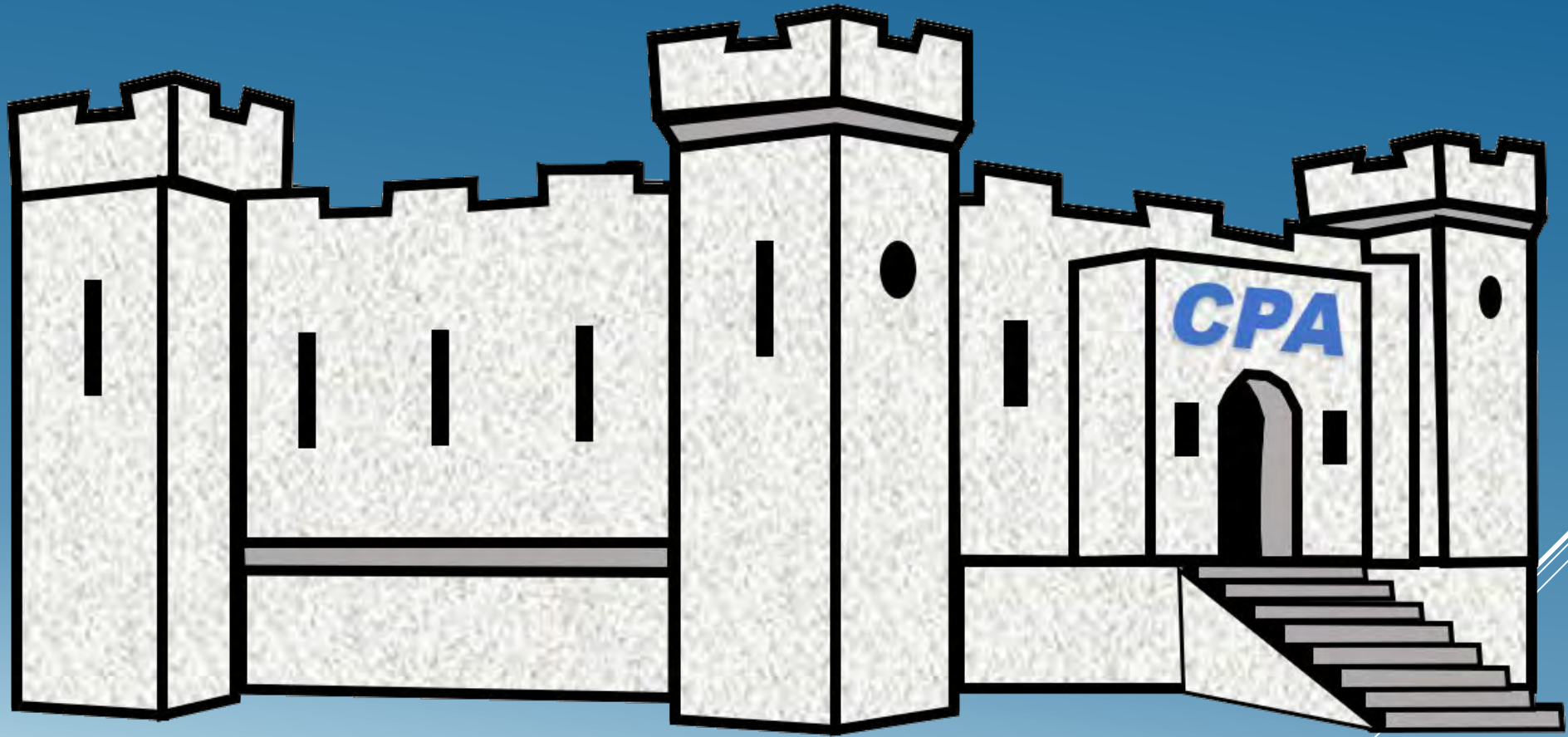
ENROLLMENTS



OUTSIDE THE FORTRESS



How is your Fortress holding up?





What is the Market selling?

<https://www.cpecredit.com> › cpe › Free-CPE-201

Free CPE Courses for CPAs - CPECredit.com

<http://www.thecpediscountstore.com>

Store: Buy Fast and Easy CPE for CPAs

Easy Discount CPE Credits for over 8 Years.

<https://cpe365.com>

CPE365 – Fast and Easy CPE

Easy to Complete CPE Courses

The CPE365 site makes it easy

You visited this page on 08/03/22

<https://cpdformula.com>

CPD Formula

save up to 50% off! More Details. CPD for CPAs - Canada's Largest CPD Marketplace ... Audit

Proof and Easy To Stay Compliant. Up-to-date materials.

You visited this page on 08/03/22.

Started on Your CPD Hours - ajag.ca

and new courses launching throughout the year. Get a

jump on your 2022 CPD hours with AJAG! Register for one of our courses today. Webinars &

<https://www.cpedepot.com>

CPE Depot - Home

Try our sample course and discover how easy it is to take courses or you can start earning your CPE credits immediately.

<https://checkpointlearning.thomsonreuters.com> › CPEasy

CPEasy - Checkpoint Learning

Bask CPEasy users will love how we make CPE easy with Checkpoint Learning training ... Our robust selection of courses cover taxation, audit, accounting, ...

<https://www.cpecredit.com> › cpe › Free-CPE-201

Free CPE Courses for CPAs - CPECredit.com

CPE Credit offers free CPE for CPAs to help meet your continuing education requirements. Try an 8 hour CPE Course for free today.

Online CPD Courses for CPAs

courses for Canadian CPAs. Get your VERIFIABLE CPD hours today!

Canadian CPA PD Courses - Get CPD Hour For Free

We offer verifiable **CPA** PD hours. Up to 50% Off for All **Courses**. Winter Sales is On. Choose

Any 20HR **CPD** Package and SAVE \$500. Verifiable PD Hours.

20-Hours Bundle (55%-Off) · Top Courses & Package · Verifiable PD Certificate

<https://www.cpe247.com> › information

Free CPE for Accountants - CPA - CPE247.com

Free CPE for Accountants - CPA ... How to Get Your Free CPE? ... Simply follow the link below and fill out the simple sign up form. Once you sign up your ...

What is the Market selling?

FAST FOOD CPE



The market is forcing Professions to ask two important questions:

1. Have CPE credits become a cheap commodity?
2. Has the professional competency requirement been compromised?

Managing the Technology Gap

Offer broad range of options

In person events
Conferences
Books & articles

Online learning websites
Webinars
E-books, Audio books

Mobile apps
Gamification
Micro-learning
Audio learning
Podcasts

VR Learning
Adaptive Learning
Artificial Intelligence

Tech
Challenged

Tech
Innovation



The Changing World of Accounting

Technical Skills

Accounting
Auditing
Tax
Software
Payroll

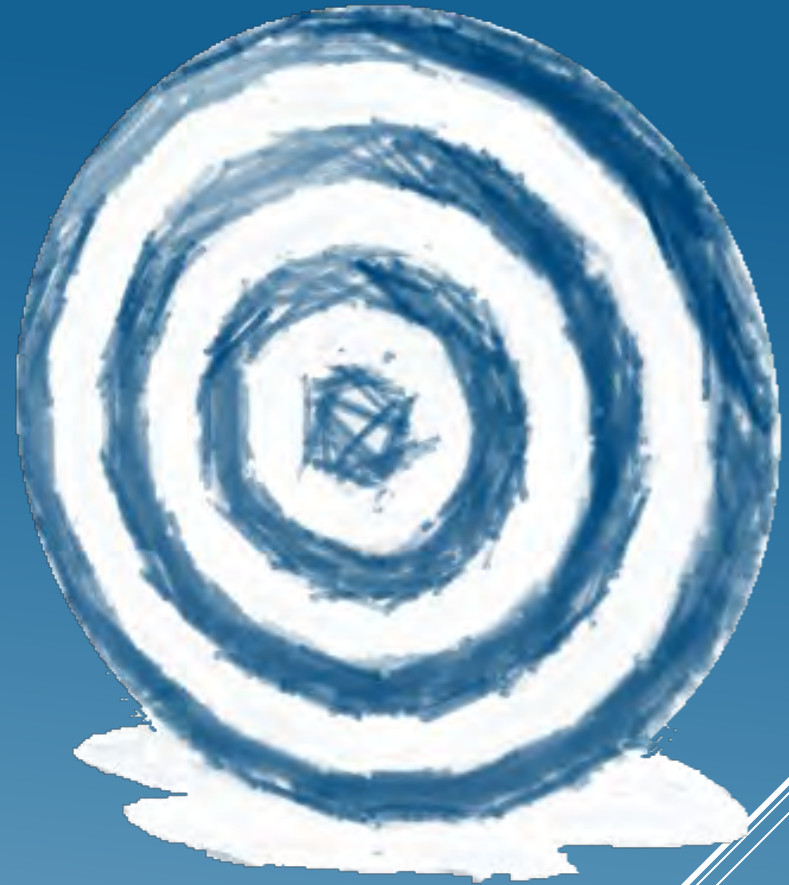
Interpersonal (Power) Skills

Leadership
Influence
Collaboration
Change Management
Employee Engagement
Retention
Client Relationships

Ethics



RECOMMENDATIONS



At the State/Provincial Level

Consider greater return to In-Person events
Although expensive and time-consuming

- Connection with membership
- Professional networks
- Control over content and value

At the State/Provincial Level

Leverage your **SUPPLIER POWER**

- Annual CPE subscriptions or “passports”
- Remove the per-course buying decision



At the State/Provincial Level

Create **trusted partnerships** with providers:

- Understand the purpose of CPE
- Understand professional standards
- Don't compete against but with you
- Listen and adapt to your needs and standards
- Provide a broad range of options

At the National Level

Need to re-examine CPE Requirements from a CONTENT perspective

- NASBA Registry
- State Boards
- Other State or Provincial Standards setting bodies or departments

At the National Level

Need to re-examine CPE Requirements from a DELIVERY perspective

- Our adaptability
- New Technologies
- Hybrid models of delivery
- User experience
- Competition between jurisdictions

Protecting the Profession

In light of what is happening in the private sector...

Is it still reasonable
to leave it to members'
professional judgment
to determine their own needs for
professional competence...

Protecting the Profession

or will they just end up consuming



FAST FOOD CPE?

The Future of Learning – a CPE Perspective
© Russell Cullingworth
President, ProDio Audio Learning Inc.





Questions or Comments

The Future of Learning – a CPE Perspective
© Russell Cullingworth
President, ProDio Audio Learning Inc.



Breakout 2A. Data Analytics using Power BI for State Societies

This session will provide an easy-to-understand explanation of how you can better understand your CPE performance with data analysis. You have a treasure trove of information in your AM system to help you better understand what your members want. This session will discuss and demonstrate how you can go in there and mine your data to provide meaningful information to help you make more informed programming decisions.

John Higgins, CPA, CITP
CPA Crossings

John H. Higgins, CPA, CITP, is the co-founder of CPA Crossings, LLC. John serves as a strategic technology advisor to CPAs in the planning and deployment of effective technology solutions and workflow automation. In 2015, John established CPA Crossings' new Cloud Accounting Learning Center, a knowledgebase of training, information and consulting services designed to help CPAs make the transformation to delivering client accounting services through the cloud.

The Power of Analytics – Delve Into Your Data



Presented By
John H. Higgins, CPA.CITP

[Return to TOC](#)
133

John H. Higgins, CPA.CITP

Strategic Technology Advisor



jhiggins@cpacrossings.com

Co-founder of CPA Crossings, LLC

Strategic technology advisor to CPAs w/ 35+ years of experience

Nationally recognized author and presenter on CPA technology trends, strategy and applications

Former Top 10 National CPA Firm Technology Partner with BDO

Recognized by CPA Practice Advisor as a Top 25 Thought Leader for the accounting profession (2011 – 2022)

AICPA Business & Industry Hall of Fame Inductee

MACPA Innovative User of Technology Award

Past Chair of the Michigan Association of CPAs



Learning Goals

After attending this presentation, you will be prepared to . . .

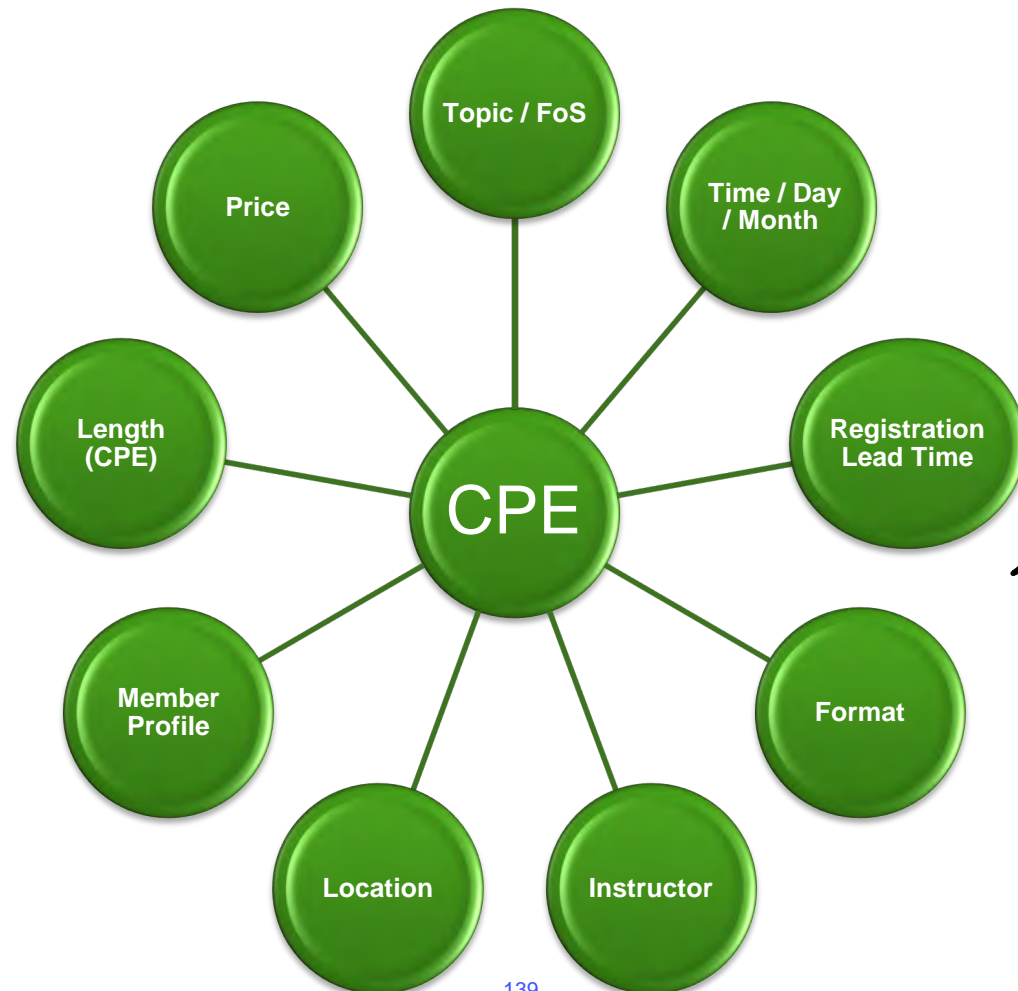
-
- 
- What is Data Analytics?
 - What Do You Want to Measure?
 - The Data Analytics Process
 - The Value is in the Reporting
 - Wrap-Up

WHAT IS DATA ANALYTICS?



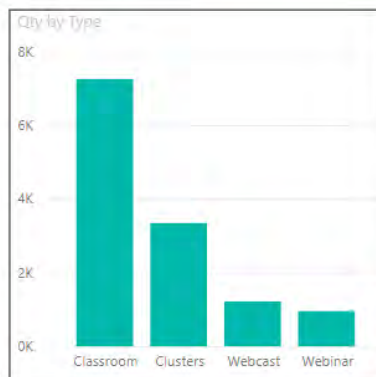
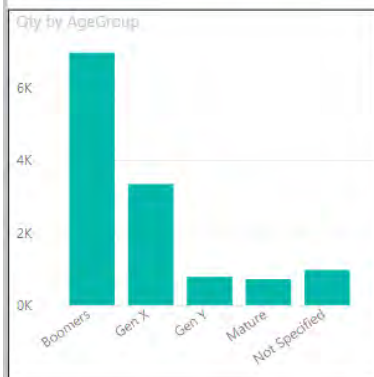
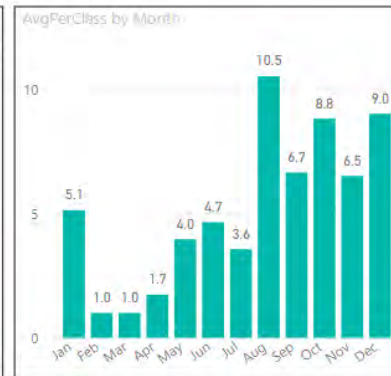
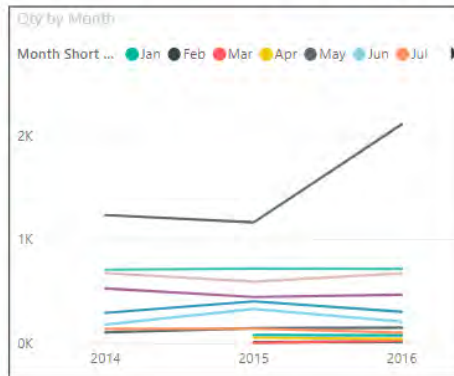
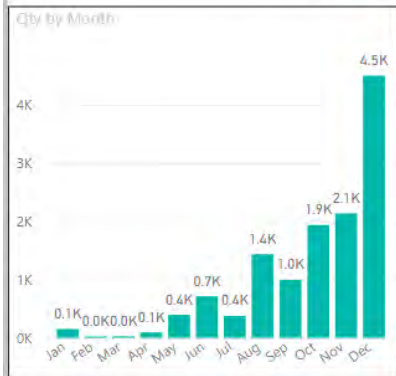
WHAT IS DATA ANALYTICS?

What Do You Want To Measure?



Measures
\$ Amount
Registrations
Total
Average
Top xx
Bottom xx

Registration Analysis by Month



Calendar Year

- ☐ 2014
- ☐ 2015
- ☐ 2016

Type

- ☐ Classroom
- ☐ Clusters
- ☐ Webcast
- ☐ Webinar

AgeGroup

- ☐ Boomers
- ☐ Gen X
- ☐ Gen Y
- ☐ Mature
- ☐ Not Specified

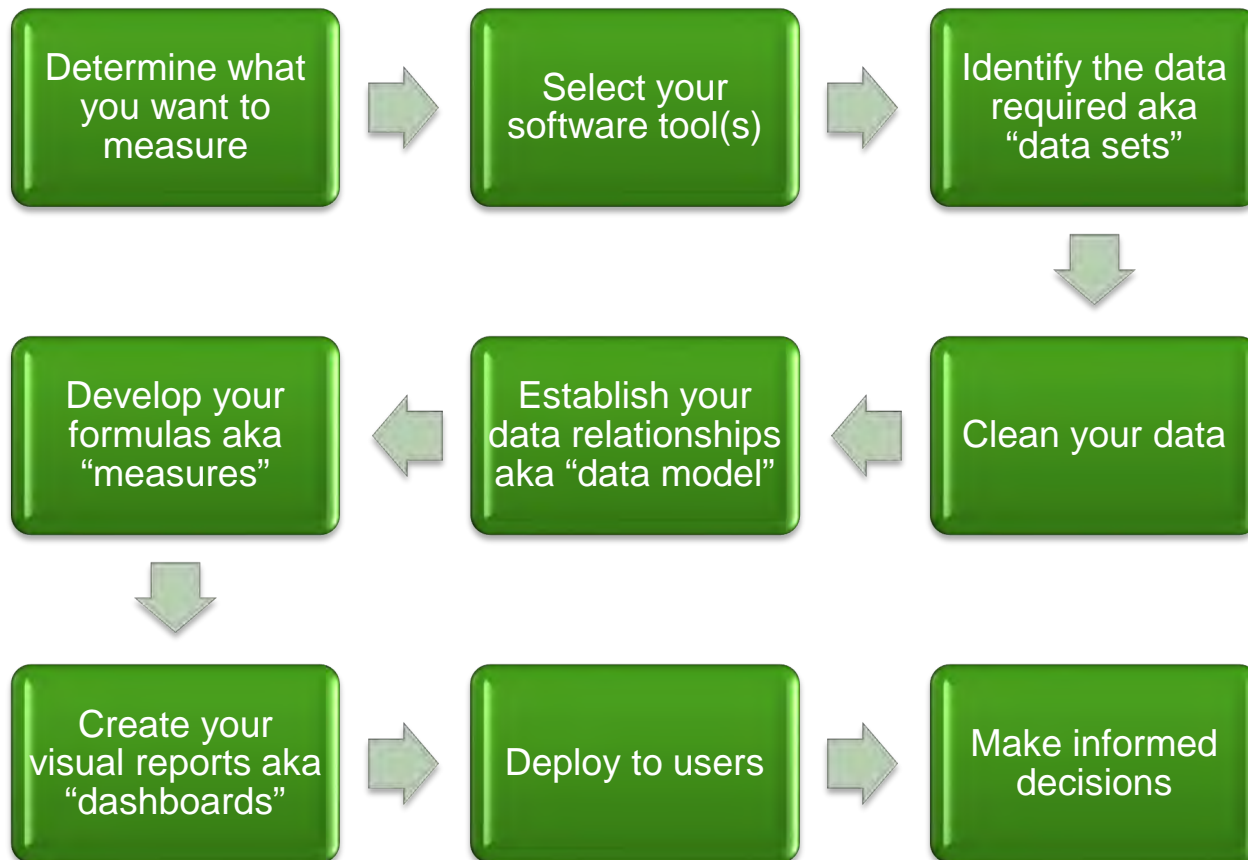
Month Short Name

- ☐ Jan
- ☐ Feb
- ☐ Mar
- ☐ Apr
- ☐ May
- ☐ Jun
- ☐ Jul
- ☐ Aug
- ☐ Sep
- ☐ Oct
- ☐ Nov
- ☐ Dec

Gender

Multiple select... ▼

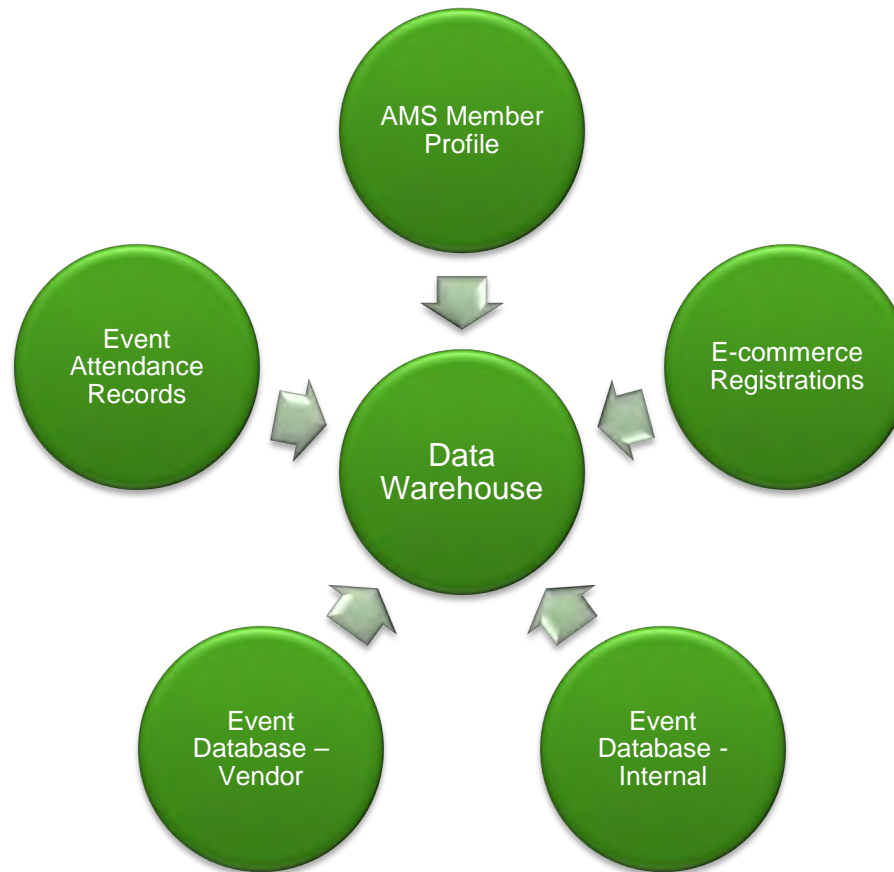
The Data Analytics Process



Data Set(s)

- Registration Transactions
- Member Profile Database
- CPE Events Database
- Attendance Database
- Course Catalog Database
 - Internal
 - Vendor

Develop Dataset Relationships



Clean Your Data!

- Date field example (all transactions need to be formatted / structured the same)
 - 6/3/22
 - 06/03/22
 - June 3, 2022
 - 060322
 - 06032022
- Use formulas
- Excel can work well for this
- Data validation in the source app works the best

Data Cleansing Example

	A	B	H	I	J	M	P	
1	Cust#	Customer Name	Product Category	Order date	Order Quantity	Sales Amount	Size	Color
411	46840	Roger L Huang	Jerseys	10/29/2010	1	49.99	XL	
412	49330	Sophia Mitchell	Jerseys	9/13/2010	1	49.99	XL	
413	23040	Drew D Raje	Jerseys	9/9/2010	1	49.99	XL	
414	33750	Julie G She	Jerseys	8/29/2010	1	49.99	XL	
415	39200	Madison C Martin	Jerseys	5/13/2010	1	49.99	XL	
786	46030	Ricardo C Nath	Mountain Bikes	2/20/2011	1	3374.99	38	Black
787	44060	Omar L Liu				3374.99	38	Black
788	36650	Kristy Rubio				3374.99	38	Black
789	52370	Troy M Suri				3374.99	38	Black
790	35000	Kathryn Chapman				3374.99	38	Black
791	29880	Jarrod E Suri	Mountain Bikes	11/7/2010	1	3374.99	38	Black
792	45030	Rachael Sai	Mountain Bikes	10/8/2010	1	3374.99	38	Black
793	13420	Antonio G Patterson	Mountain Bikes	9/30/2010	1	3374.99	38	Black
794	45060	Rachael M Rodriguez	Mountain Bikes	9/20/2010	1	3374.99	38	Black
795	34660	Kate L Raji	Mountain Bikes	7/22/2010	1	3374.99	38	Black
796	23090	Dustin Chander	Mountain Bikes	6/29/2010	1	3374.99	38	Black
797	44160	Orlando J Carlson	Mountain Bikes	6/4/2010	1	3374.99	38	Black
798	15600	Brett Mehta	Mountain Bikes	1/26/2010	1	3374.99	38	Black
799	20430	Cynthia Malhotra	Mountain Bikes	1/21/2010	1	3374.99	38	Black

Blank cells s/b blank not a space

Data must be of the same type throughout a column

When a column is mixed, they should all be text

All Text

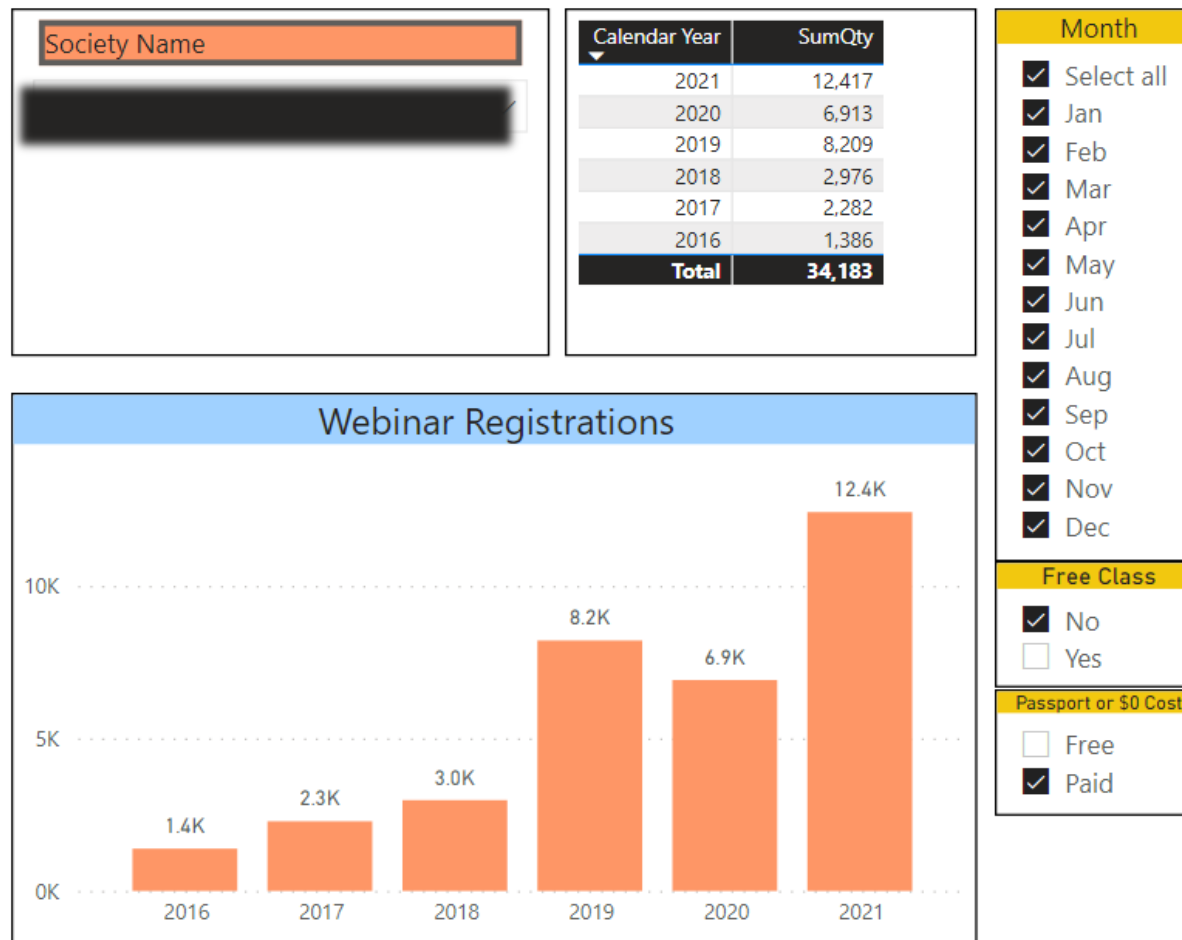
All Dates

All Values

Develop Your Measures (Calculations)

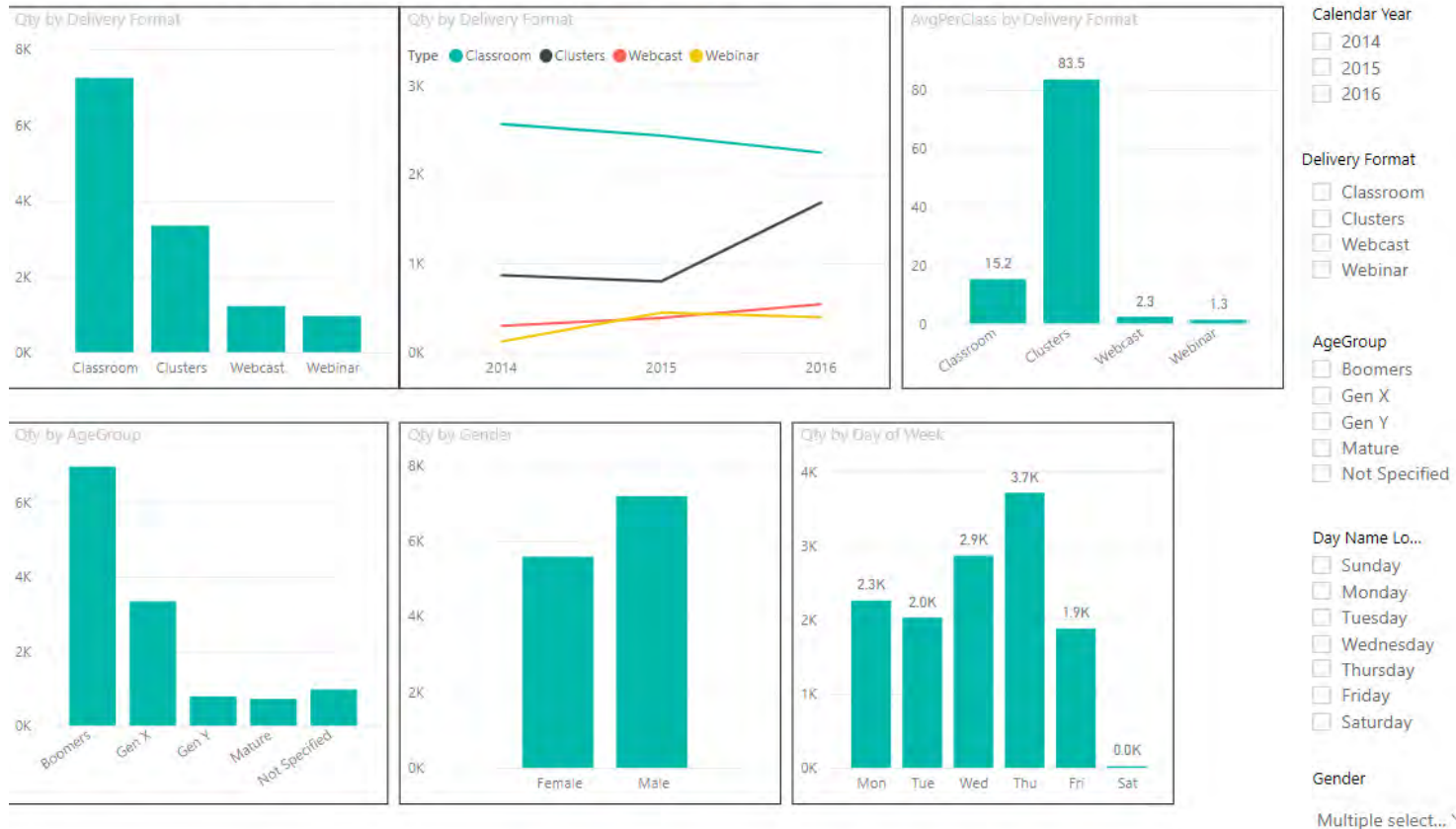
- Total attendance divided by events
- Total revenue divided by total events
- Events by FoS divided by total events
- Total revenue divided by total events
- Count number of events by day of week
- Total CPE credits awarded by total attendees
- Total revenue divided by number of members
- Other?

The Value is in the Reporting



-
- Determine what to show
 - Data or graphic
 - Drill down option?
 - Bar chart / line chart / pie chart / other
 - How many visuals in total and per page
 - Filters
 - Interactive
 - Date range
 - Subset of data element
 - Get user input / feedback as you are creating it

Registration Analysis by Delivery Format



Deploy To Users

- Options / process tied to software tool used
- “Responsive” to mobile device
- Provide a live / interactive training session
- Provide a recorded training session
- Listen to their feedback!

Select Your Software Tool(s)

- Excel
 - Table Format / Pivot Tables
- Power BI (Office 365)
- Tableau
- Built-in App
 - AMS
 - E-Commerce
 - Event Management System

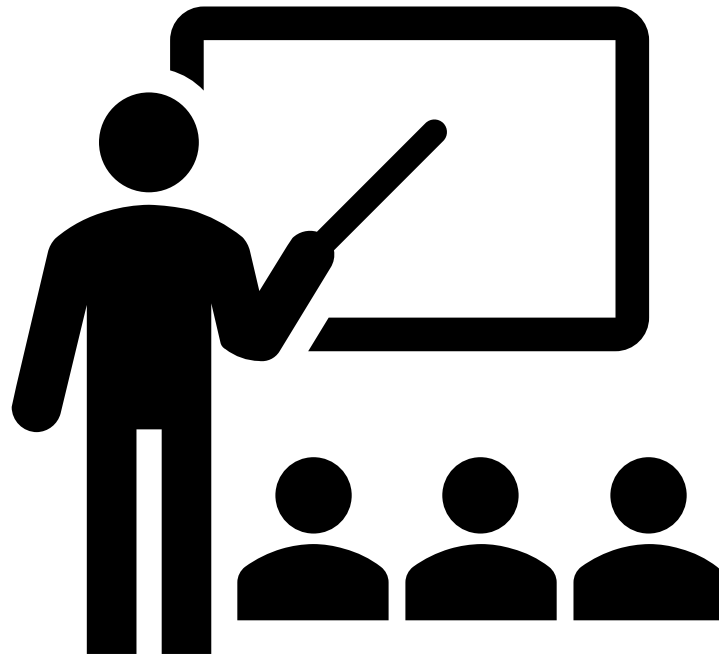
Next Steps

- Establish Team
 - CPE / Membership / Accounting / IT representation
- Apps training
- Build reports
- Start simple!

Complimentary Training for State Society Personnel

- Webinars or on demand
- Excel and Power BI
 - [Excel - Two Must Know Features: Defined Names & Tables](#)
 - [Power BI - Analyze Your Data With Excel Pivot Tables](#)
 - [Microsoft Power BI Series](#)
- Contact Marcia Sheehy (msheehy@cpacrossings.com) to register

WRAP-UP



Presentation Wrap-Up

- Data analytics can range from simple to complex
- You can accomplish a lot with Excel
- Consider getting help from members
- Collaborate with your peers
- Keep it simple!

Questions ?



Breakout 2B. Hybrid Events Panel

Hosting a successful event now means being able to cater to an in-person or virtual crowd – but success goes beyond just a simple simulcast. The last two years have pushed both subject matter experts and educators into new, unfamiliar territory quickly. Identifying the needs of our attendees while traversing a landscape of new learning requirements to keep things flowing seamlessly has been a challenge, but what have we learned? Where do we go from here? Join this panel discussion and let's find out!

Moderator

Jon Lockhorst

Cravety

Panelists

Nick Rial

Washington Society of CPAs

Nichole Favors

Indiana Society of CPAs

Paul Burton

Illinois Society of CPAs

Hybrid Events Panel

Moderator: Jon Lokhorst, CPA, PCC
CPA Educators Conference
March 24, 2022



1

Moderator: Jon Lokhorst, CPA, PCC, CVP

Executive Leadership Coach
Lokhorst Consulting LLC
Princeton, MN
jon@lokhorstconsulting.com



2

Paul Burton

Assistant Director – Education Production
Illinois CPA Society
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3

Nichole Favors

Director – Learning & Collaboration
 Indiana CPA Society
 Indianapolis, IN
nfavors@incpas.org



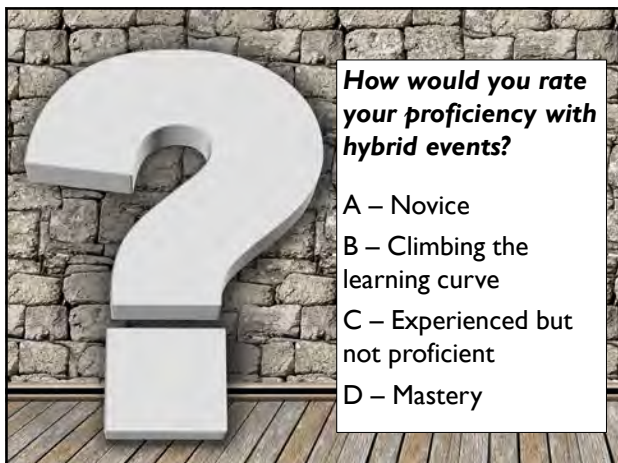
4

Nick Rial

Education Content Coordinator
 Washington Society of CPAs
 Bellevue, WA 98005
nrial@wscpa.org



5



6

What are the minimum viable resources necessary to deliver an exceptional hybrid event?



7

How are you getting staff on board and trained to deliver seamless hybrid events?



8

How do you juggle between adaptability and managing costs with the potential for costly last-minute changes?



9

***What are you doing to engage
the two sides of the audience to
provide an equally excellent
experience for everyone?***



10



11

***Thank you for
participating in
today's panel
discussion!***



12

Breakout 3A. LMS Choice & Implementation: Lessons Learned

State boards, NASBA, and certificates: oh my! When it comes time to report CPE, sometimes you need more than just spreadsheets and PDF's. Learning Management Systems can help: providing convenience for your members and the potential for an integrated learning solution across all your systems.

In this session, Hayden Williams and Nick Rial of the Washington Society of CPA's will explain their choices, struggles, and successes in choosing and implementing an LMS.

Please note: There will be no handout or presentation for this session. The Subject Matter Experts encourage you to ask questions and take notes.

Hayden Williams, CPA, CGMA
Washington Society of CPAs

Hayden Williams, CPA, CGMA, is currently the CFO of the Washington Society of CPAs (WSCPAs). Prior to this position he was the Director of Education for the WSCPAs and the Director of Finance for the Arizona Society of CPAs and spent five years in public accounting.

Nick Rial
Washington Society of CPAs

Nick Rial has been a part of the education team for the WSCPAs for five years, serving as a main point of contact for technology execution at events and on the customer service team. He attributes his technical wizardry to his time spent at Carnegie Mellon University. He hails from the great state of Pennsylvania, and spends his days hanging out with his dog, as well as listening to too many audiobooks.

Breakout 3B. Automating CPE Tracking: Including Hybrid Events

The Virginia Society of CPAs (VSCPA) has leveraged an integration between Conferences i/o and AM.Net to move from paper sign-in sheets and post conference forms to a fully automated, digital attendance tracking process for Group Live CPE programs.

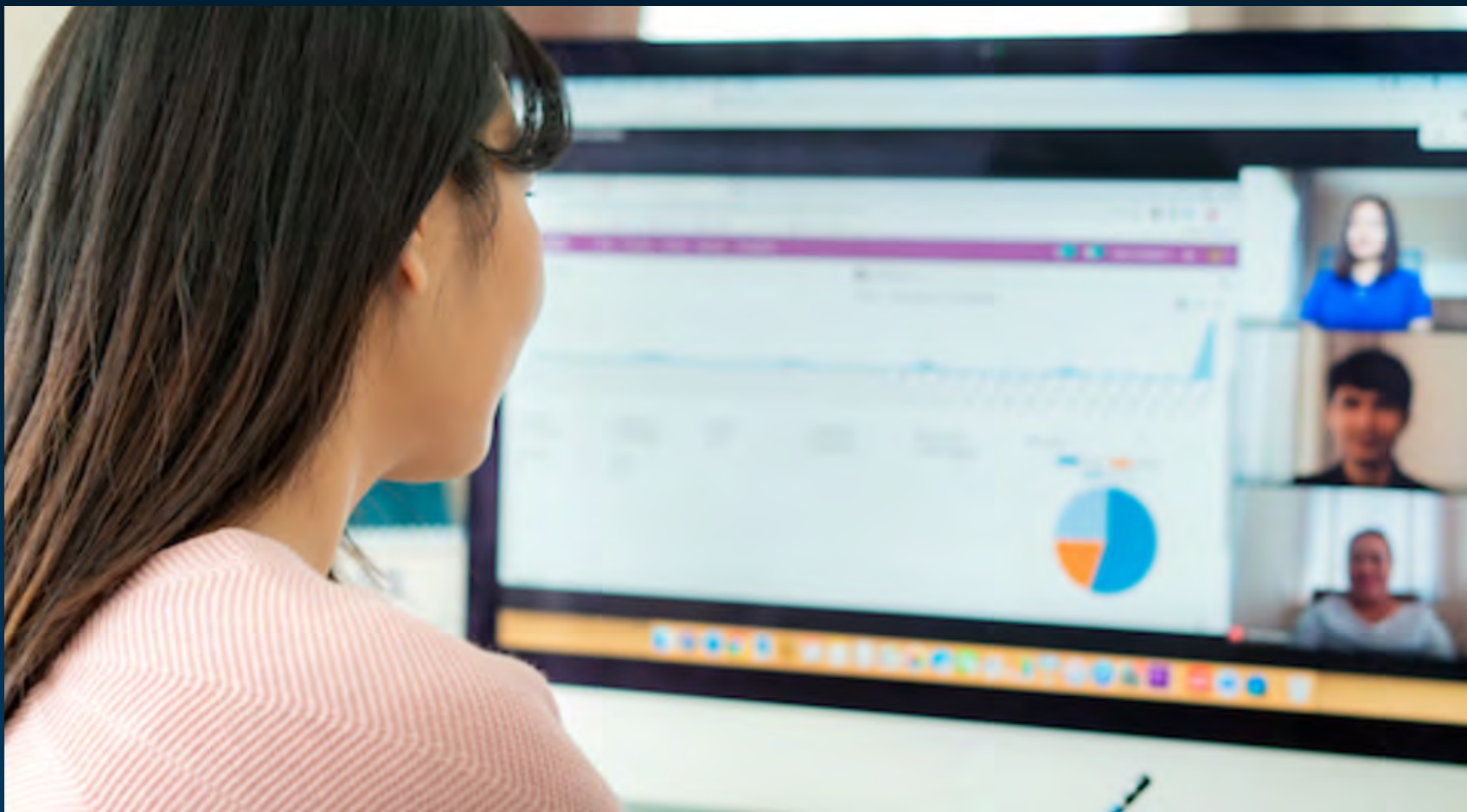
John Pytel

Conferences i/o

John Pytel is a co-founder of Conferences.IO. John graduated from Michigan State University with a BA in Marketing and Entrepreneurship and after a brief stint with The Nielsen Company, left to pursue his entrepreneurial dreams.

Completely Automate Your CPE Attendance Tracking

— Group Live, Virtual and Hybrid events —



Open your browser
and go to

cpa.cnf.io

OR just point your
phone's camera at
the QR code



cpa.cnf.io



powered by
conferences i/o

The Future of CPE Event Technology

Go Back

What is your relationship to Conferences i/o?

- ☐ I am a current customer
- ☐ I am a former customer
- ☐ I'm not a customer but familiar with the tool
- ☐ This is the first time I'm learning about the tool

Submit

Agenda

- Brief History of Conferences i/o
- Conferences i/o Functionality Overview
 - Group Live
 - Group Internet
 - Hybrid
- AM.Net Integration
- VSCPA Case Study
- Q&A

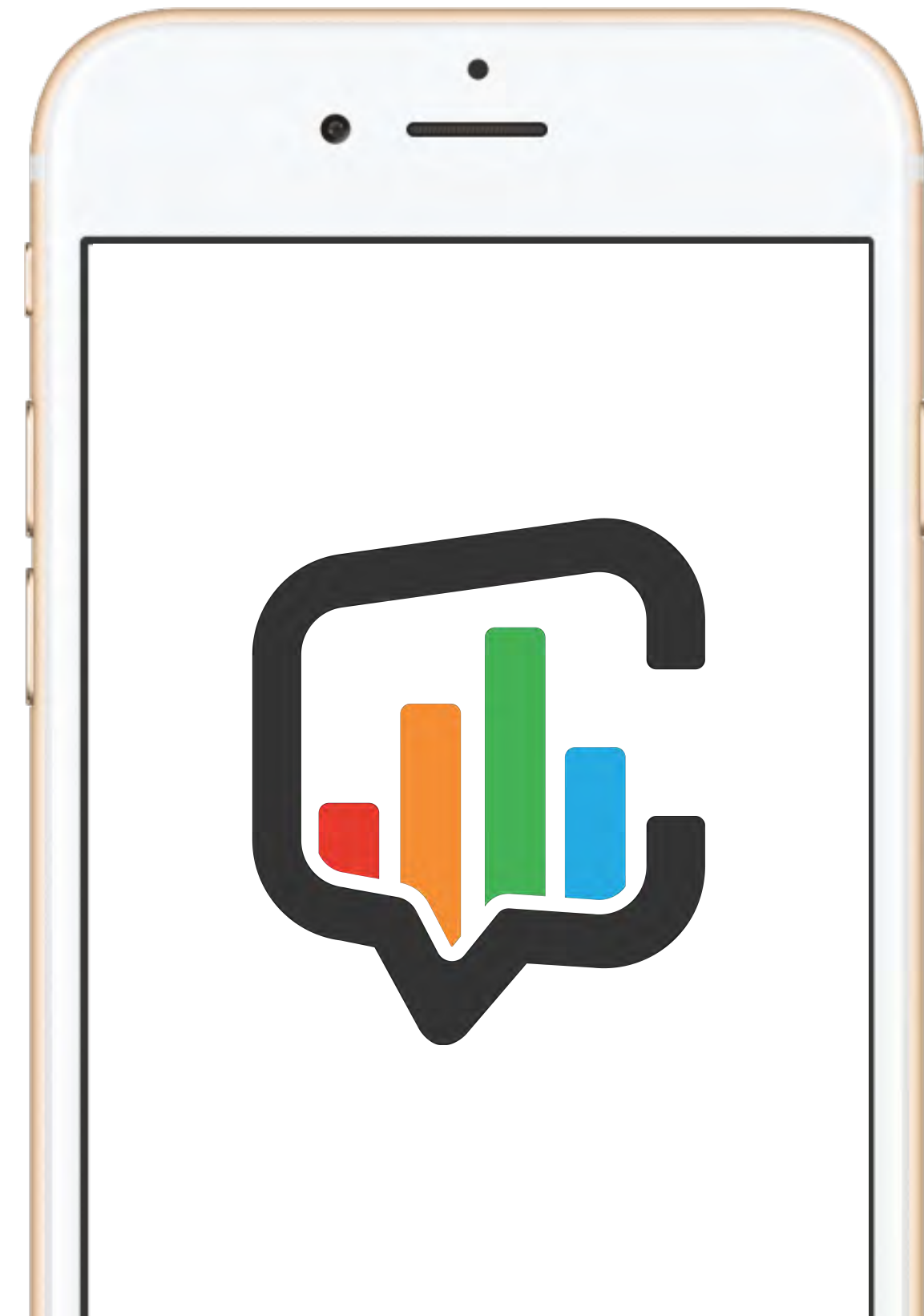


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Poll

Which CPE event format(s) do you expect your org to offer in 2022?

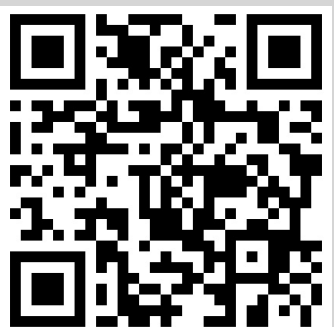
- A) In-Person Seminars / Trainings
- B) Virtual Seminars / Trainings
- C) Hybrid Seminars / Trainings
- D) In Person Conferences
- E) Virtual Conferences
- F) Hybrid Conferences



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A Brief Review of the history of Conferences i/o



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We Started With Engagement For Live (in-person) Events



2013



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Organizations Naturally Started Adopting Our Tool In Continuing Education Settings. Our CPA customer base began to grow.



2013



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We Helped Satisfy NASBA Group Live Requirements For Engagement, Q&A and Session Evaluations



2013



Participate at cpa.cnf.io

In 2018 We Launched Our Attendance Tracking Solution Designed For Group Live Programs



2013

2018

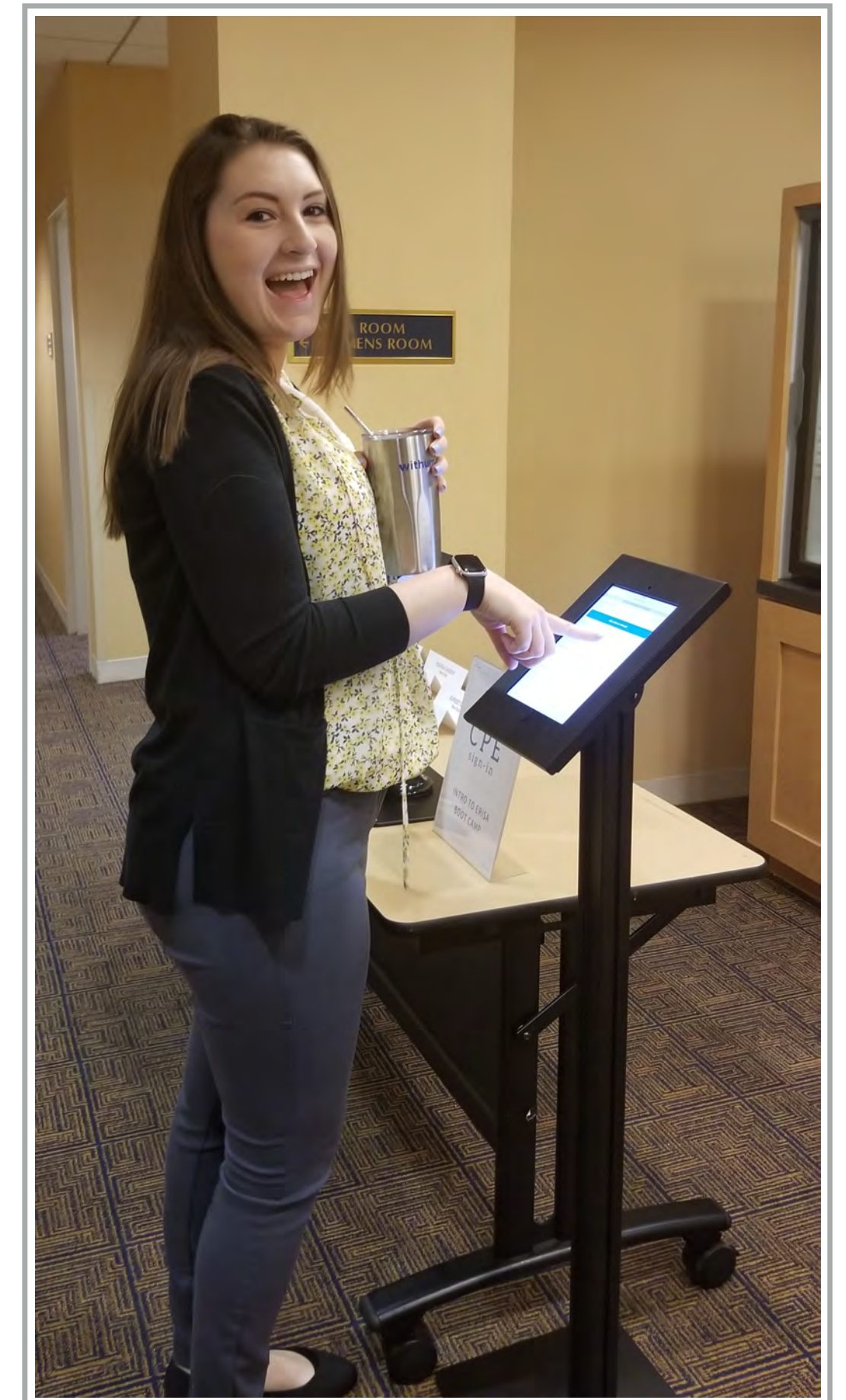


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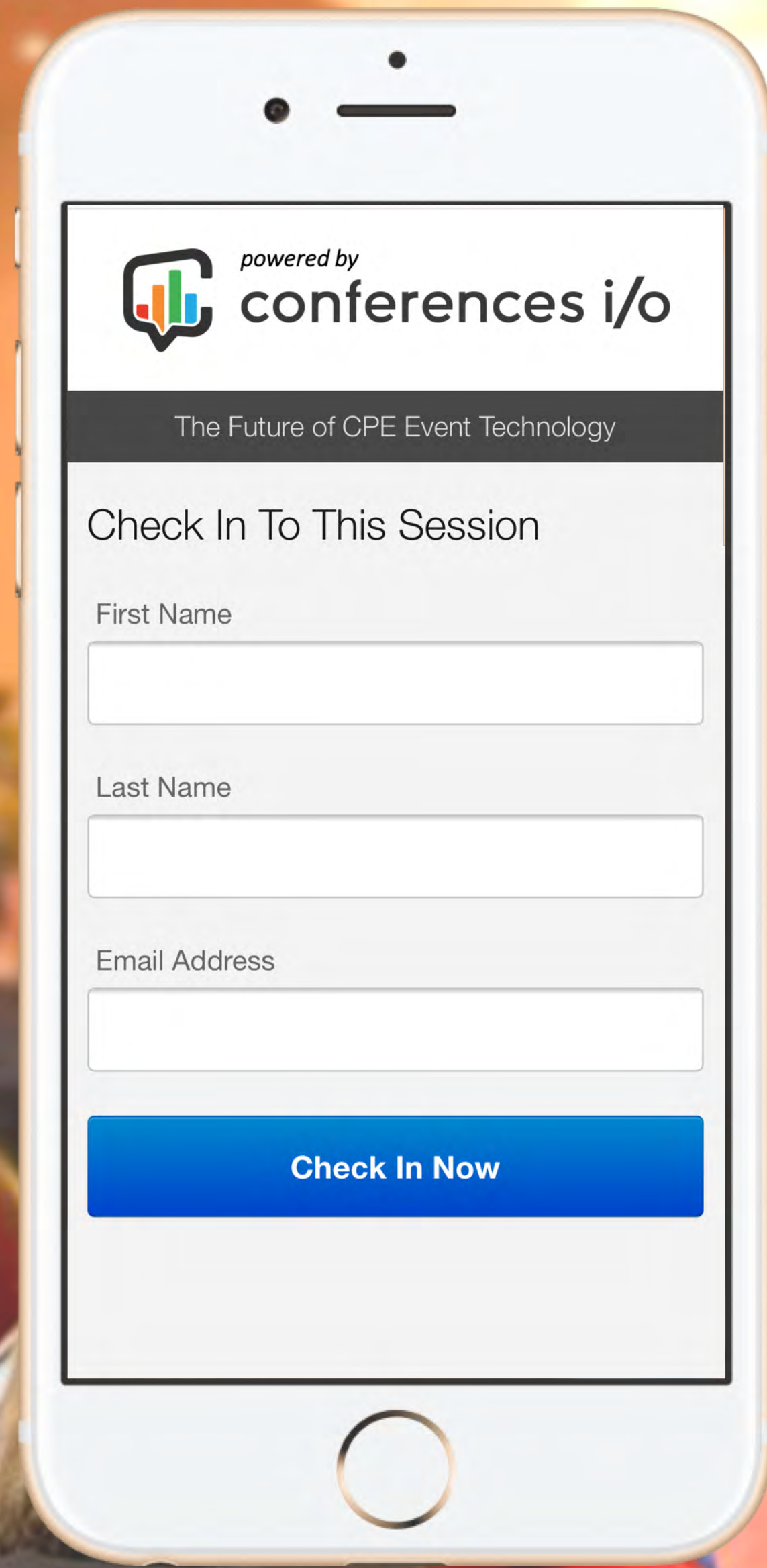
“My team LOVES their new digital sign-in system”

- Amy Plent
Director, L&D

withum⁺



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“Conferences i/o saves us countless hours of work dealing with CPE attendance for our conferences

... not to mention the tens of thousands of dollars we save on badge scanners!”

- Director of Education



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LMS / AMS Integrations



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Certificate of Completion

is hereby presented to

Scott Carlisle

For Successful Completion

Small Business Broker-Dealers

Group Live

2 Auditing, 2 Accounting, 1 Governmental

5 CPE Credits

In accordance with the standards of the National Registry of CPAs, the credits have been granted based on a 50-minute hour. The National Registry of CPAs and the accounting have final authority on the acceptance of credit.

 **conferences i/o**

John CPA Firm

1111 Street, Chicago IL 60654

National Registry Sponsor Number: 141642

Credits (CR)

Session : (Managers) Auditing Not-for-Profit Entities: Superior Skills for an Effective and Efficient Audit

Fields of Study : Auditing

Credits Earned : 1 (12/2/20)

Session : AICPA's Annual Update: Top Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs (YB)**

Fields of Study : Accounting

Credits Earned : 1 (12/2/20)

Session : Jim Martin's Conquering the New Revenue Standard (NEW)

Fields of Study : Accounting

Credits Earned : 1 (12/2/20)

Session : Surgent's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships

Fields of Study : Governmental Accounting

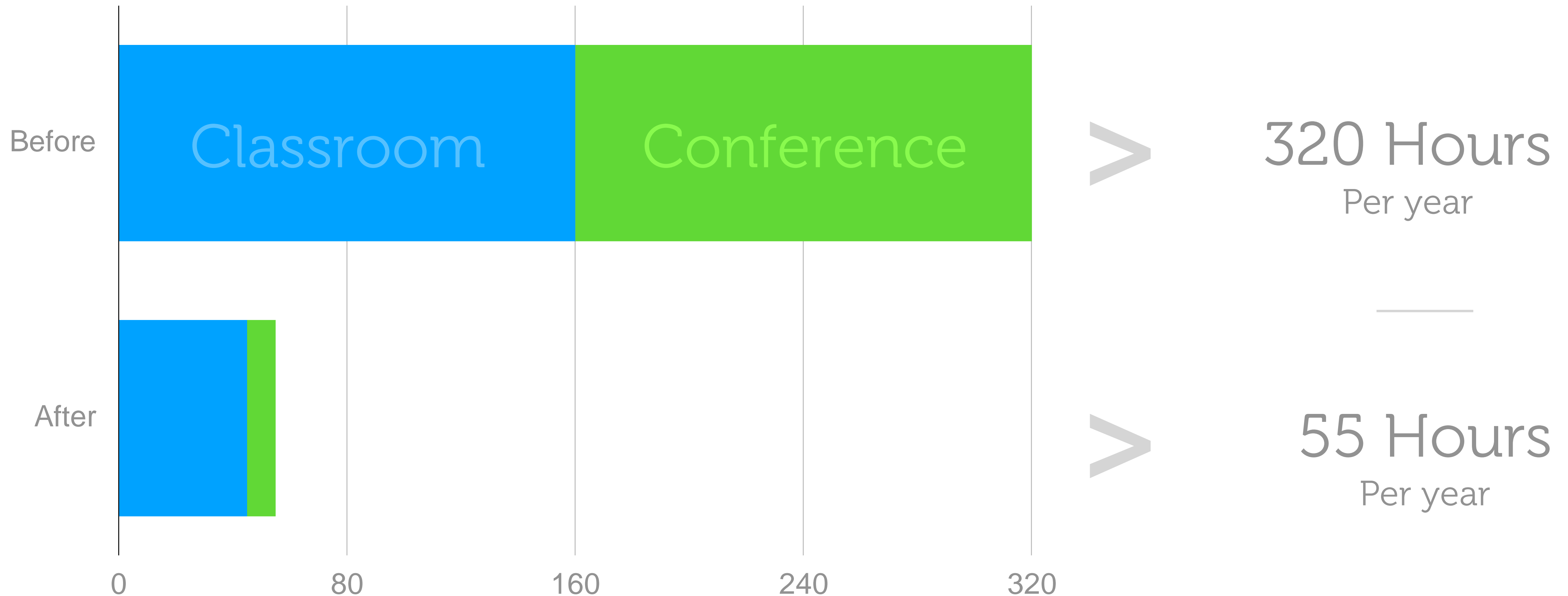
Credits Earned : 1 (12/2/20)



Participate at cpa.cnf.io

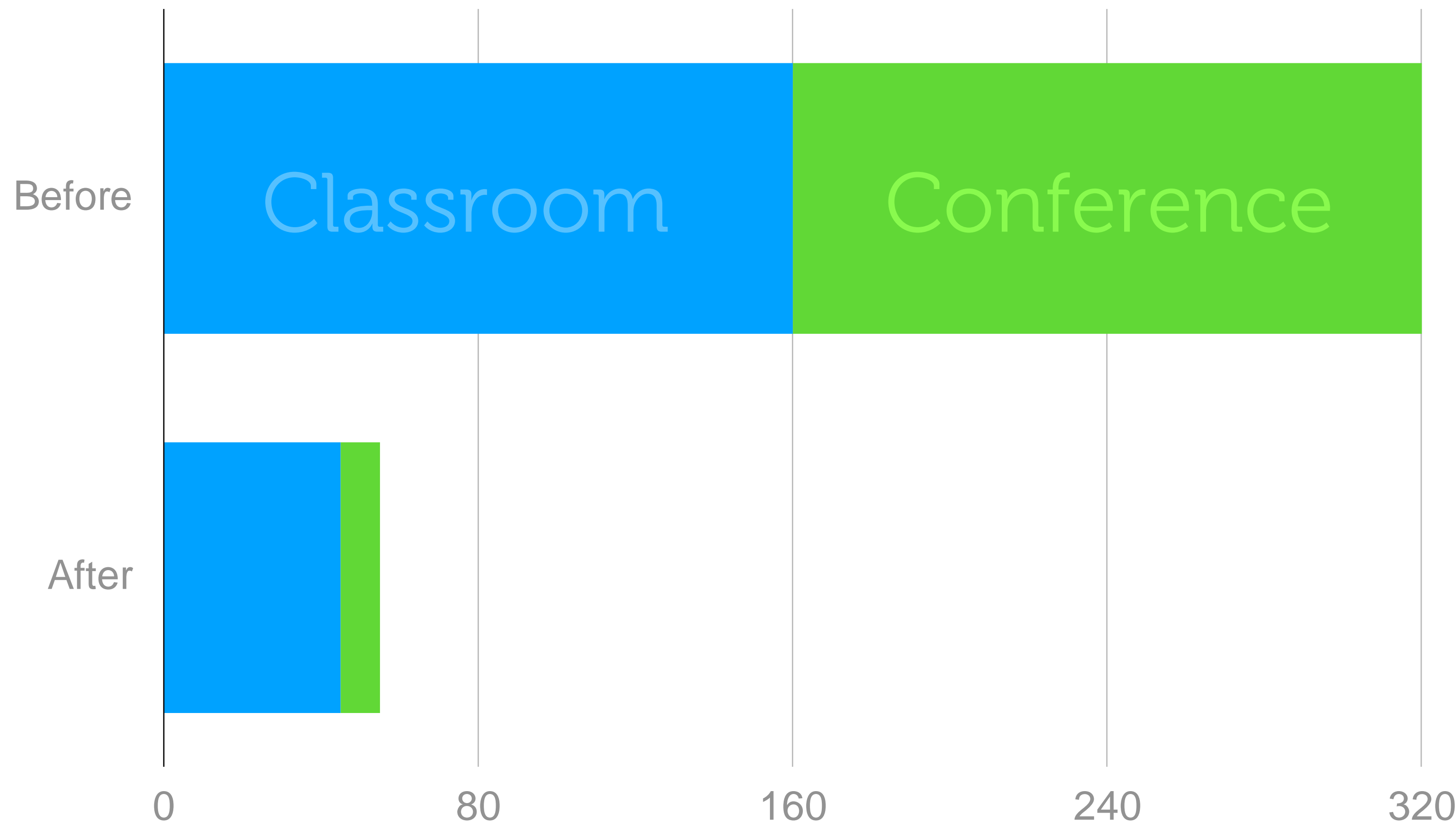
 **conferences i/o**

Hours Spent Reconciling CPE Attendance



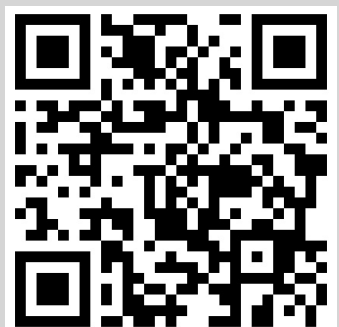
Participate at cpa.cnf.io

Hours Spent Reconciling CPE Attendance



>

80%
Reduction in
time spent



Participate at cpa.cnf.io

By the end of 2019 the accounting industry had become our single largest customer segment — over 10,000 events per year



2013

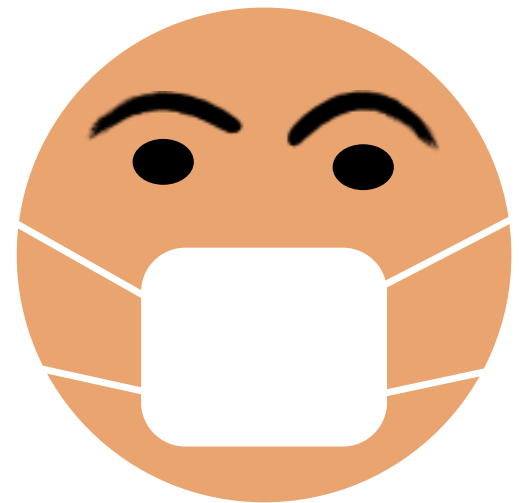
2018

2019



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And then COVID Hit...



2013

2018

2019

2020



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Live Events Became Extinct



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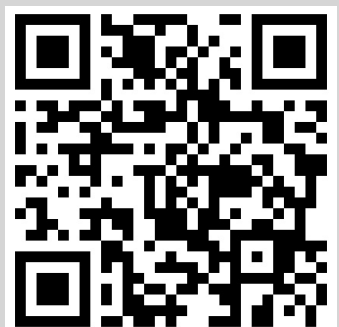
**We're not going to stay 100%
virtual forever but virtual is
here to stay**



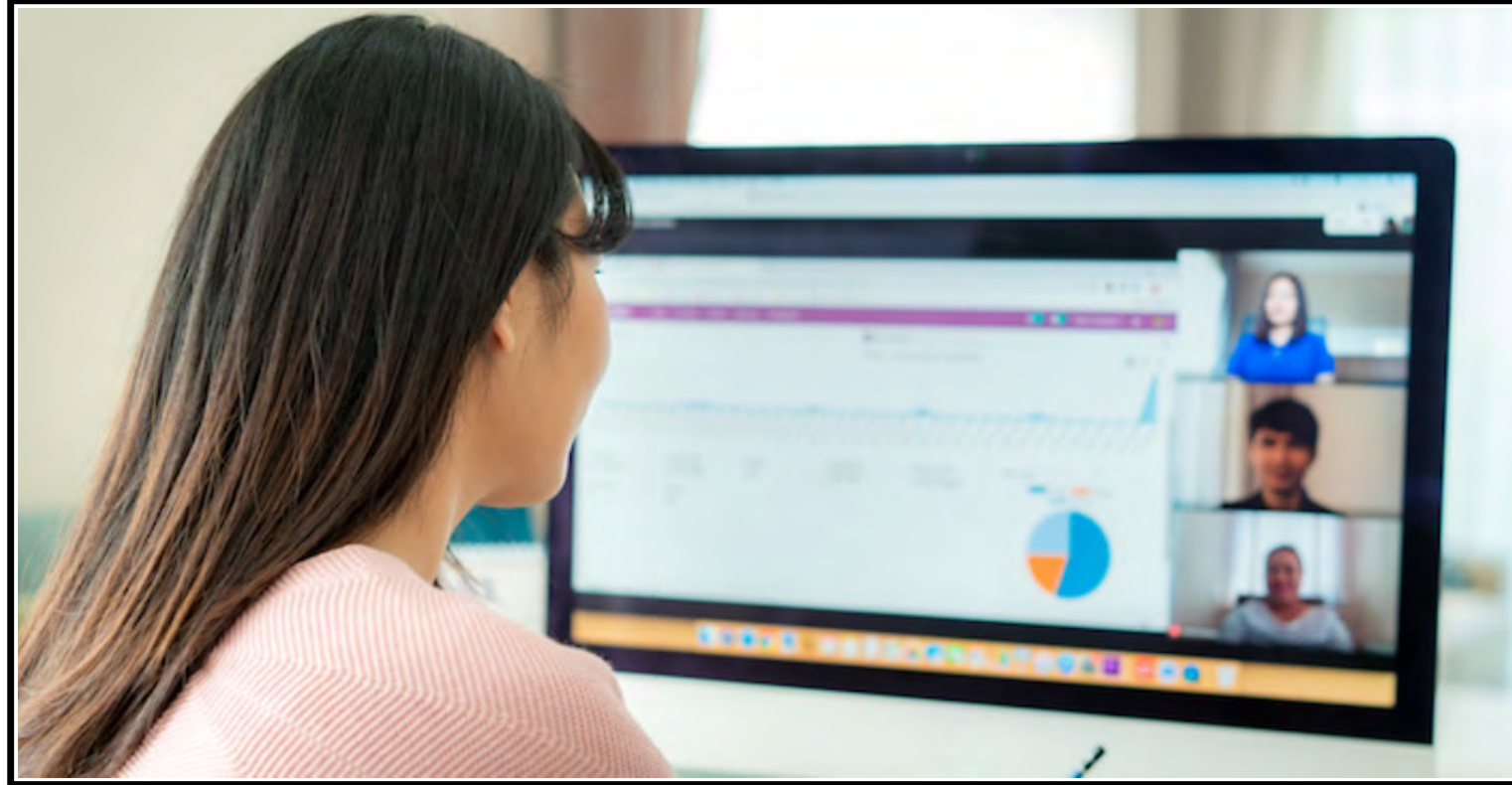
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Future CPE programs will be a combination of formats

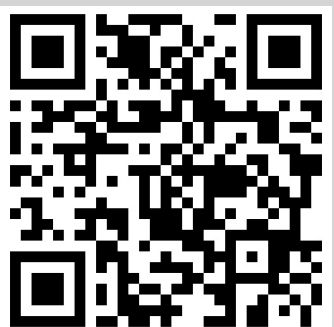
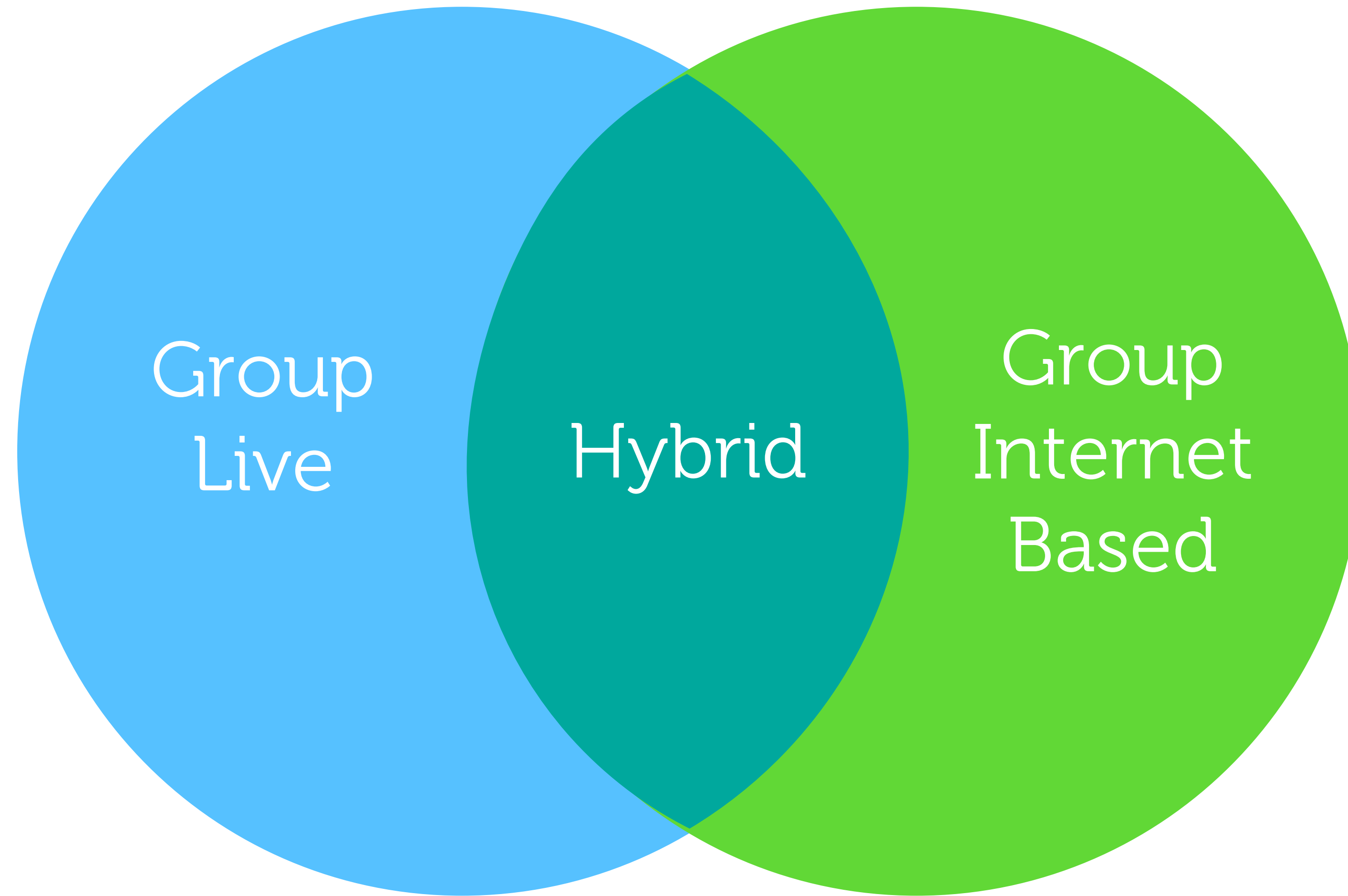


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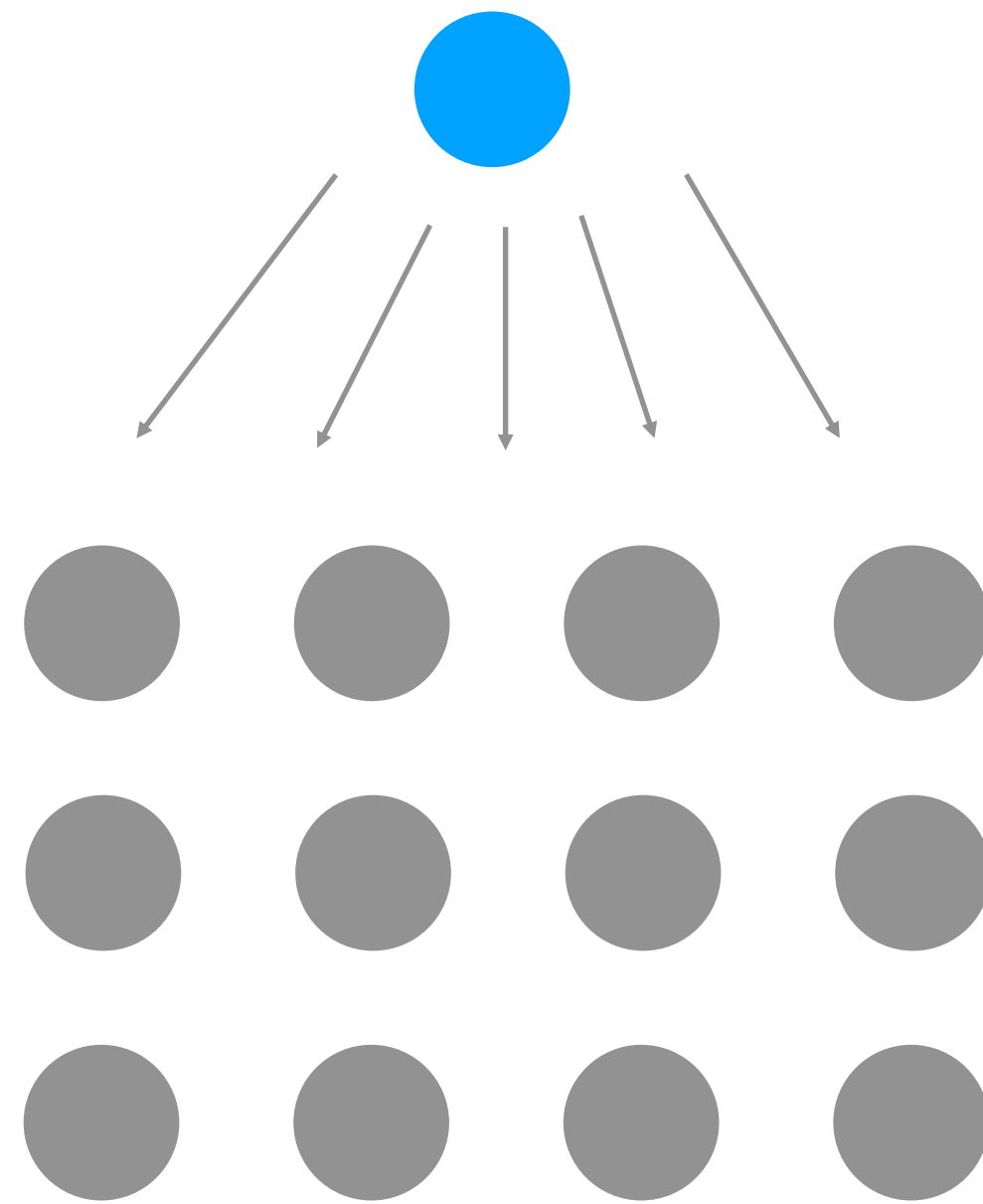
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NASBA Compliance Standards Differ

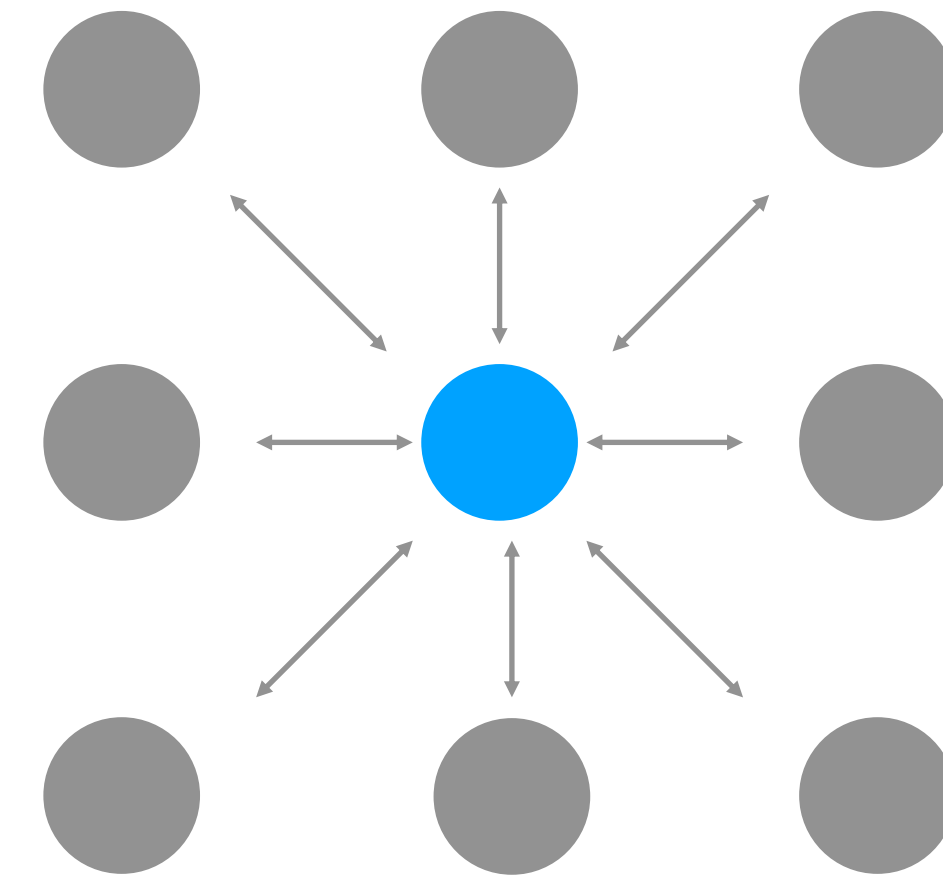


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The Instructional Design Differs



One-to-Many Lecture



2 Way Interaction



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Ability to Participate Differs



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Multiple Different Platforms & Technology Are Required

Group Live Class

ADP Live Seminar Materials

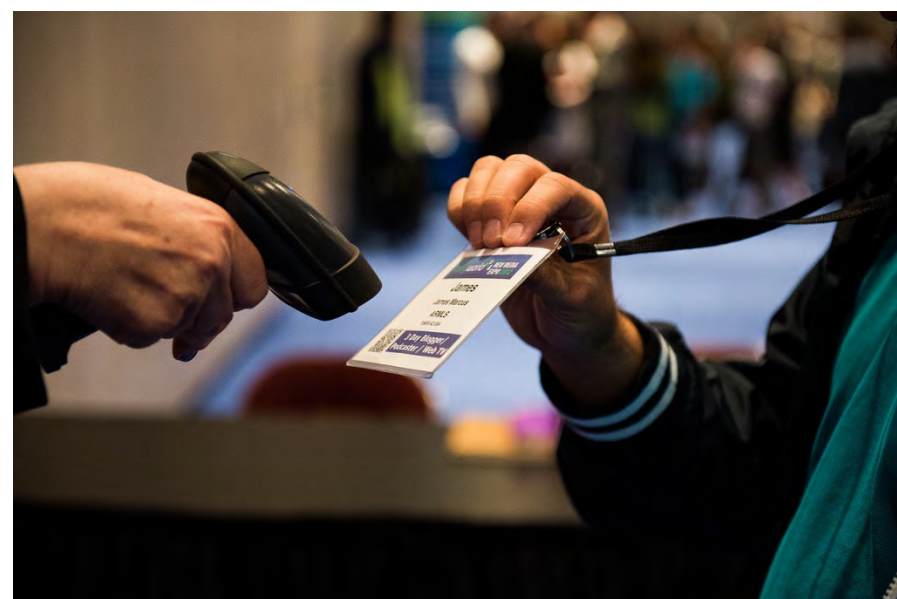
Sign in Sheet

[illegible]

After event Sign in Sheet is emailed to ADPSUPPORT@SMARTPROS.COM or faxed to (866) 498-8611



Group Live Conference



GIB Internal



GIB External



GIB Conference



Certificates



LMS & Compliance



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HYBRID

LEARNING

ENGAGEMENT

WEBCAST PLATFORM

NASBA

LMS INTEGRATION

CLASSROOM

COMPLIANCE

ATTENDANCE CHECKS

LIVE-STREAMING

GROUP INTERNET BASED

MULTI-OFFICE

SIGN-IN SHEETS

BADGE SCANNERS

GROUP LIVE

CONFERENCES



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Our vision is to calm the chaos.

No matter what the new normal looks like.



Participate at cpa.cnf.io

The single Attendance
Tracking & Engagement
solution for all Group
CPE events



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CPE Attendance Tracking



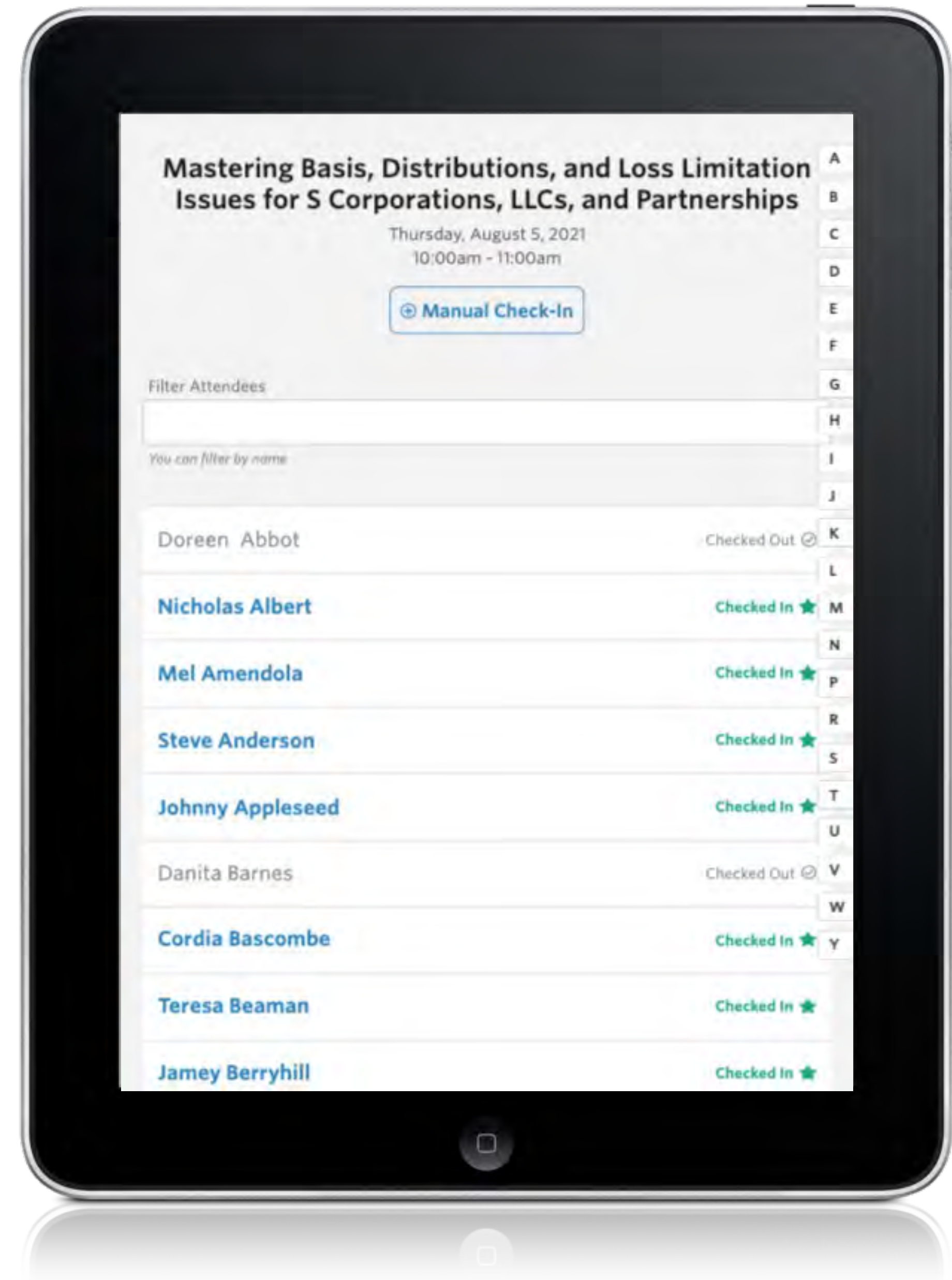
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Group Live (In-Person)

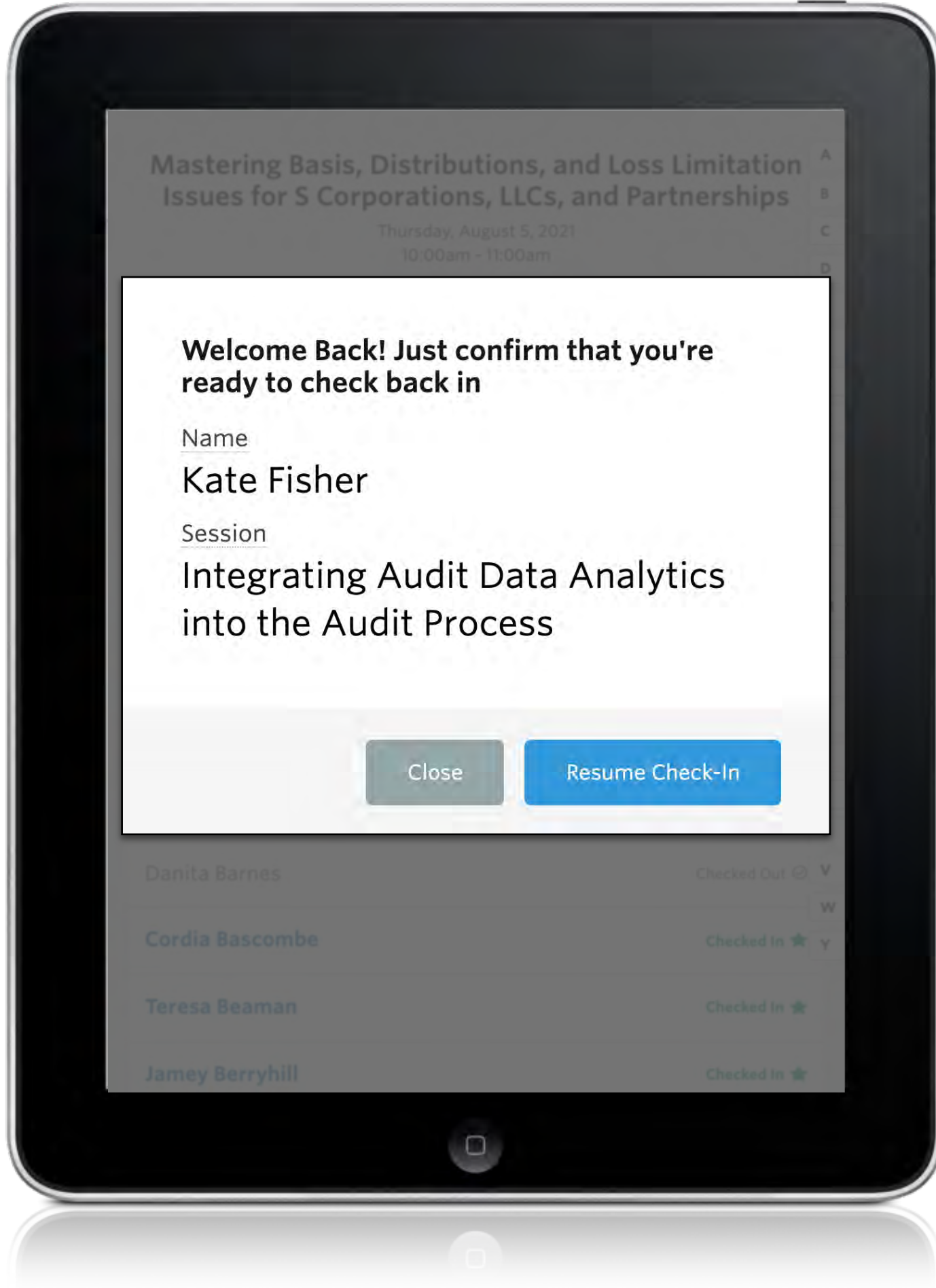
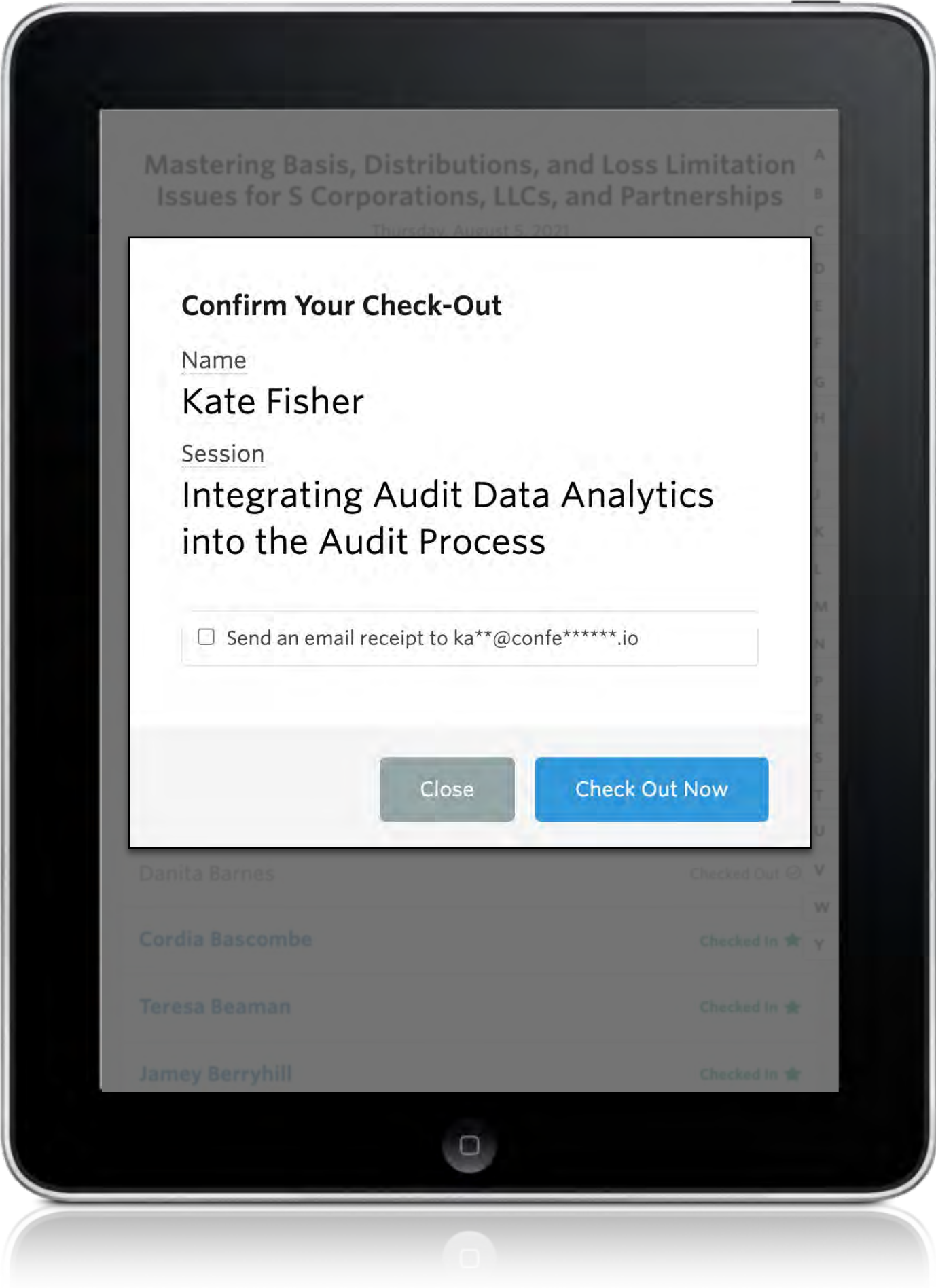
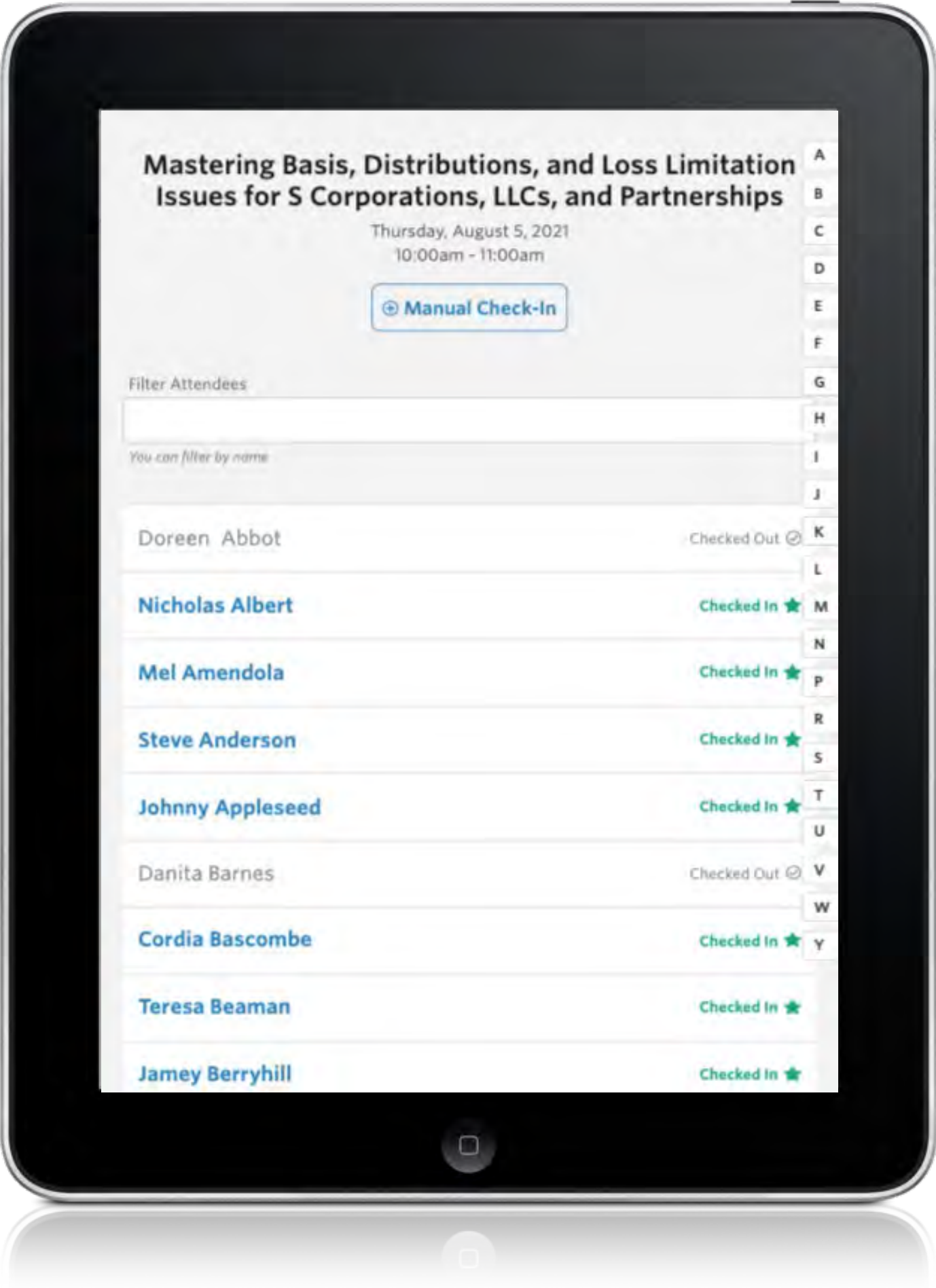
Kiosk Mode

- ▶ Designed for classroom style or single-track events
- ▶ Digital replacement of a sign-in sheet
- ▶ Registered attendees can be pre-loaded



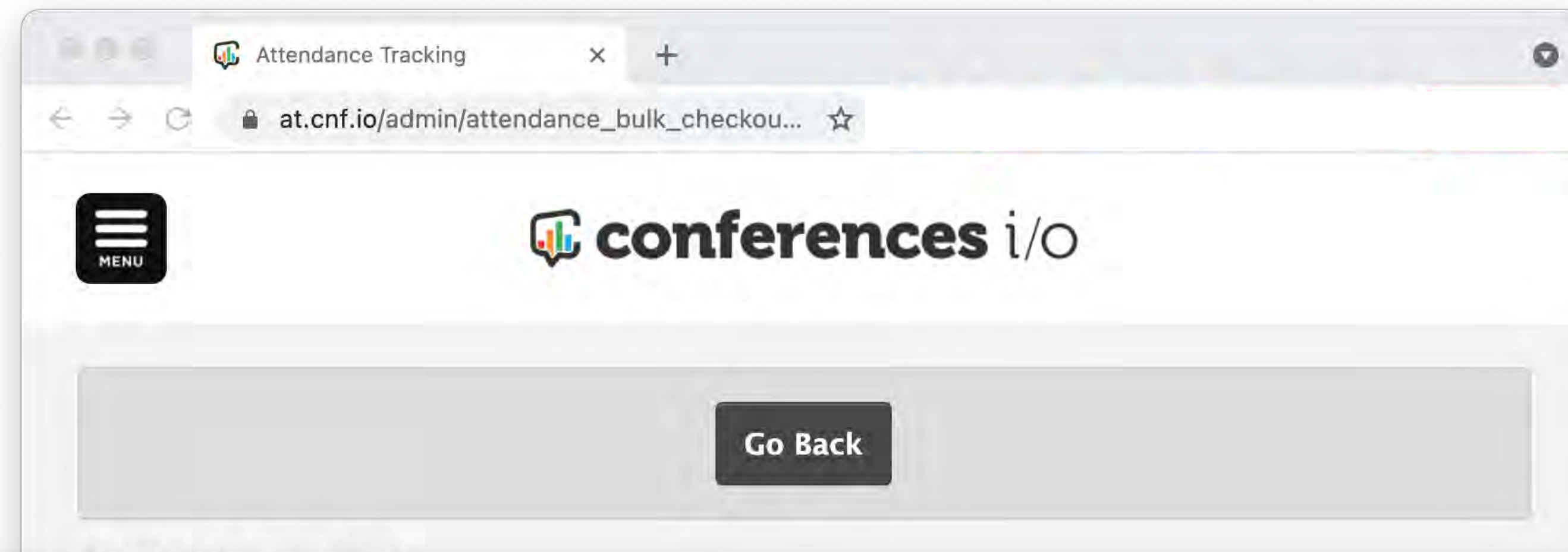
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Kiosk Mode



Participate at cpa.cnf.io

Kiosk Mode




Bulk Check-Out

Clicking the **Check Out** button will check-out all attendees who are currently checked into *Demo Session*. Attendees who are already checked out will not be affected.

The end of the session (7:00pm) will be used as the check-out time.

Kiosk Check-Ins: 15

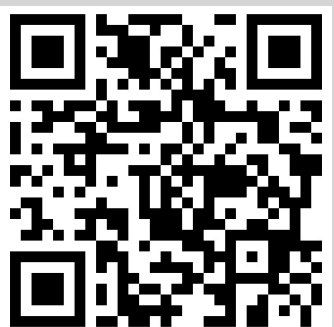
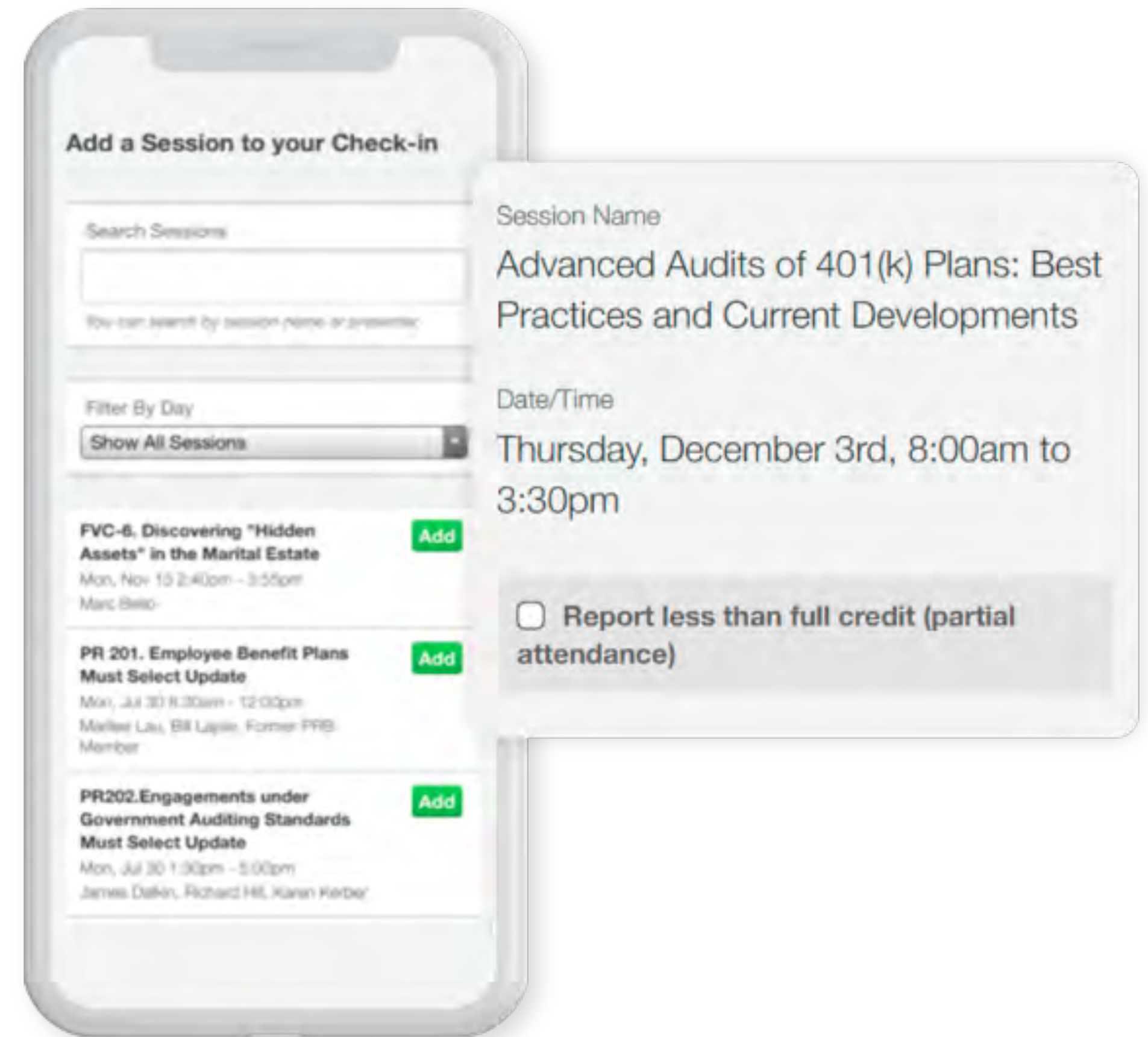
 Check Out



Participate at cpa.cnf.io

Self Reporting Mode

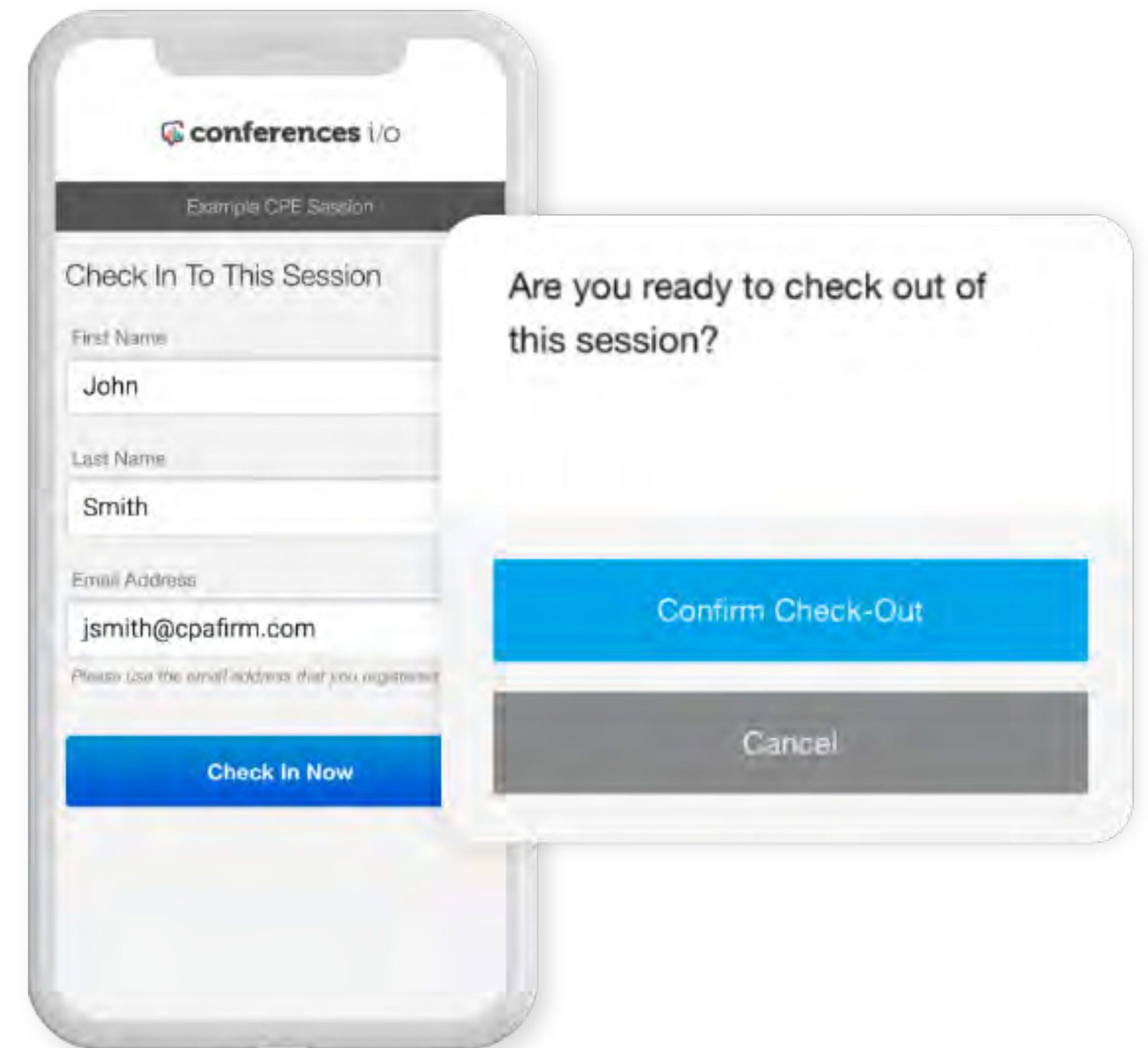
- Designed for conferences. Replacement of CPE Form.
- Attendees use their own device to self report sessions attended
- Requires check-out codes for NASBA compliance



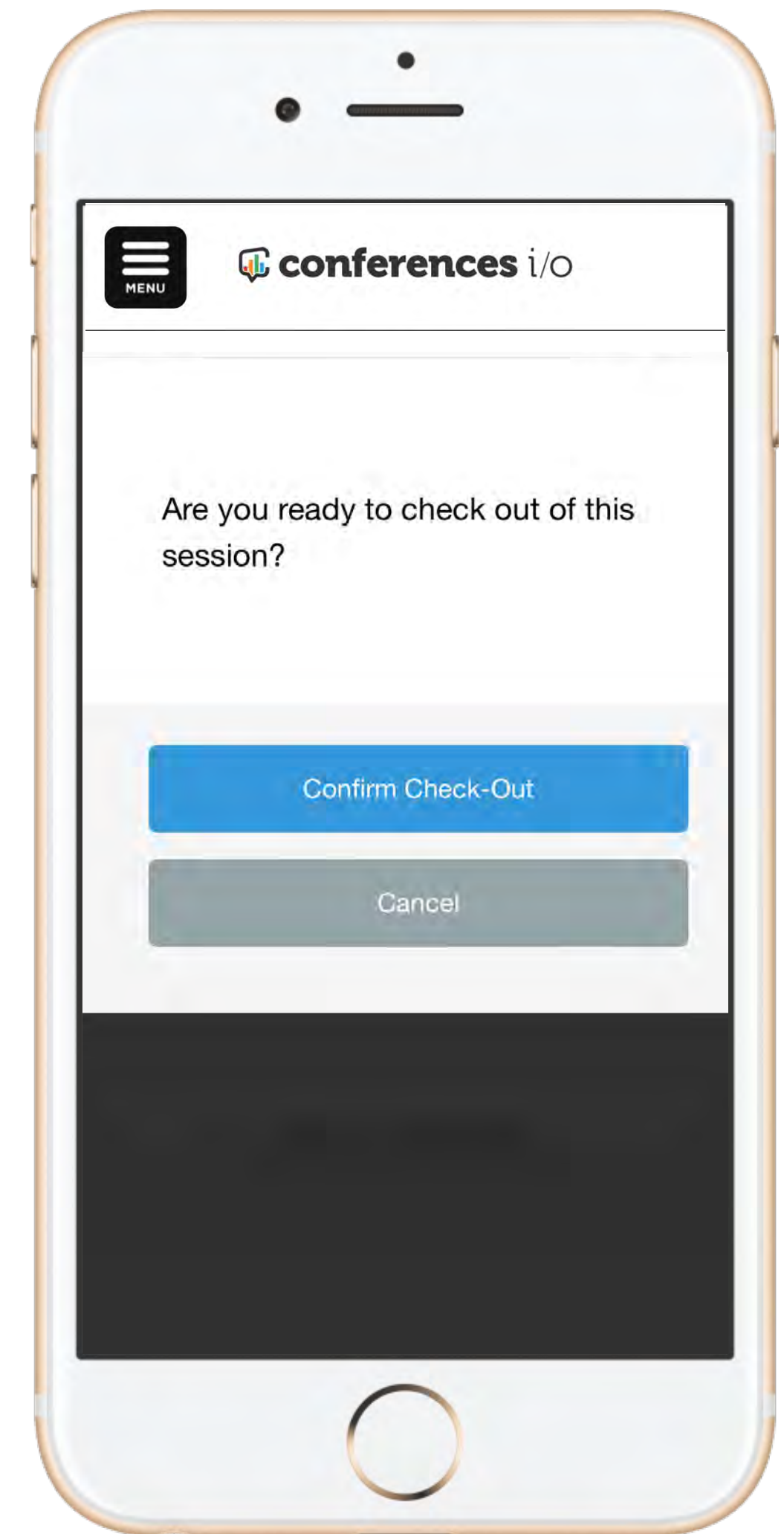
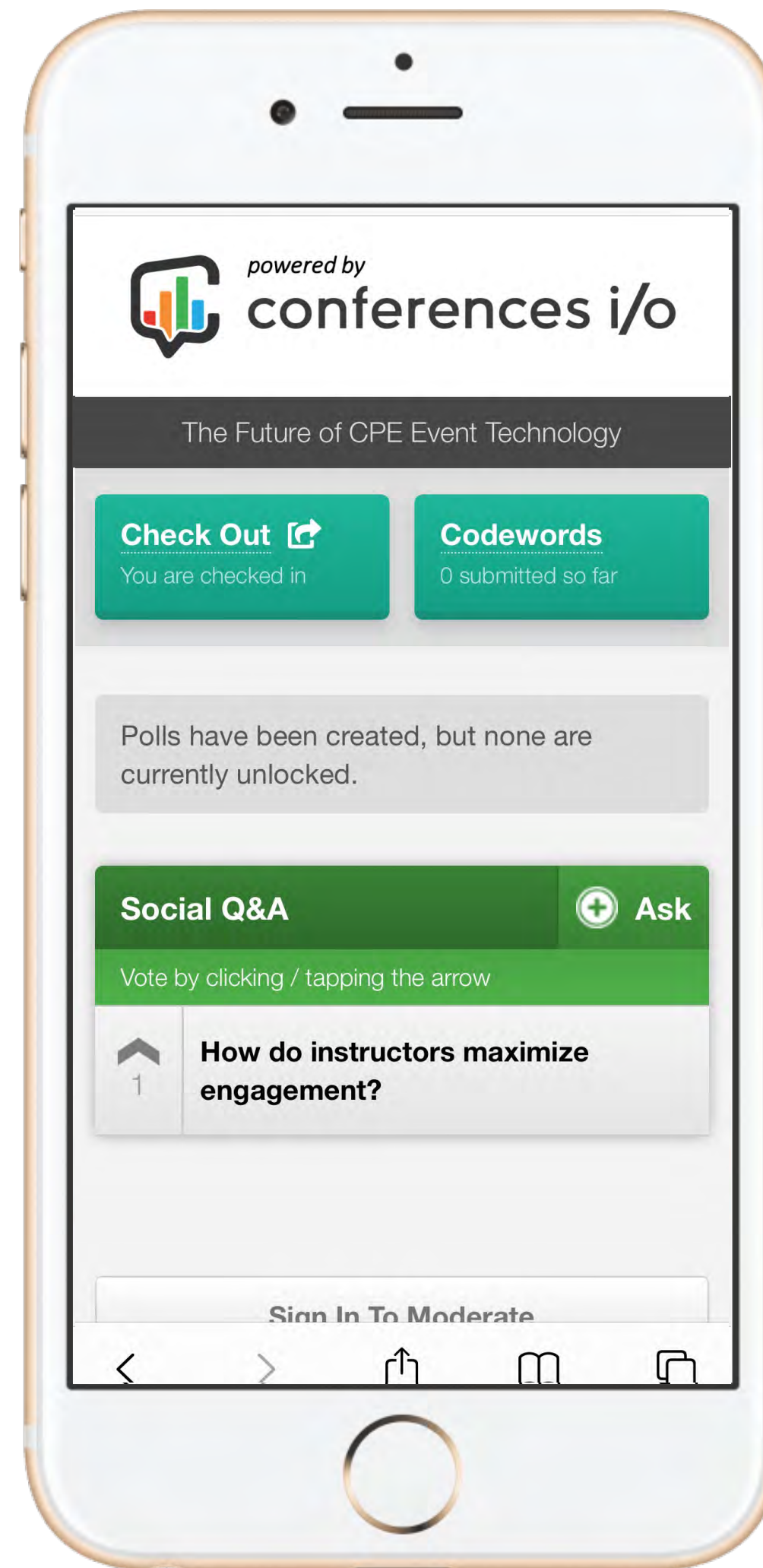
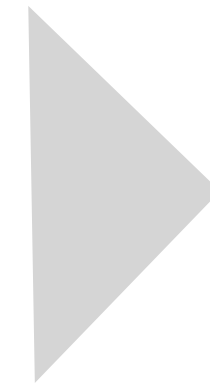
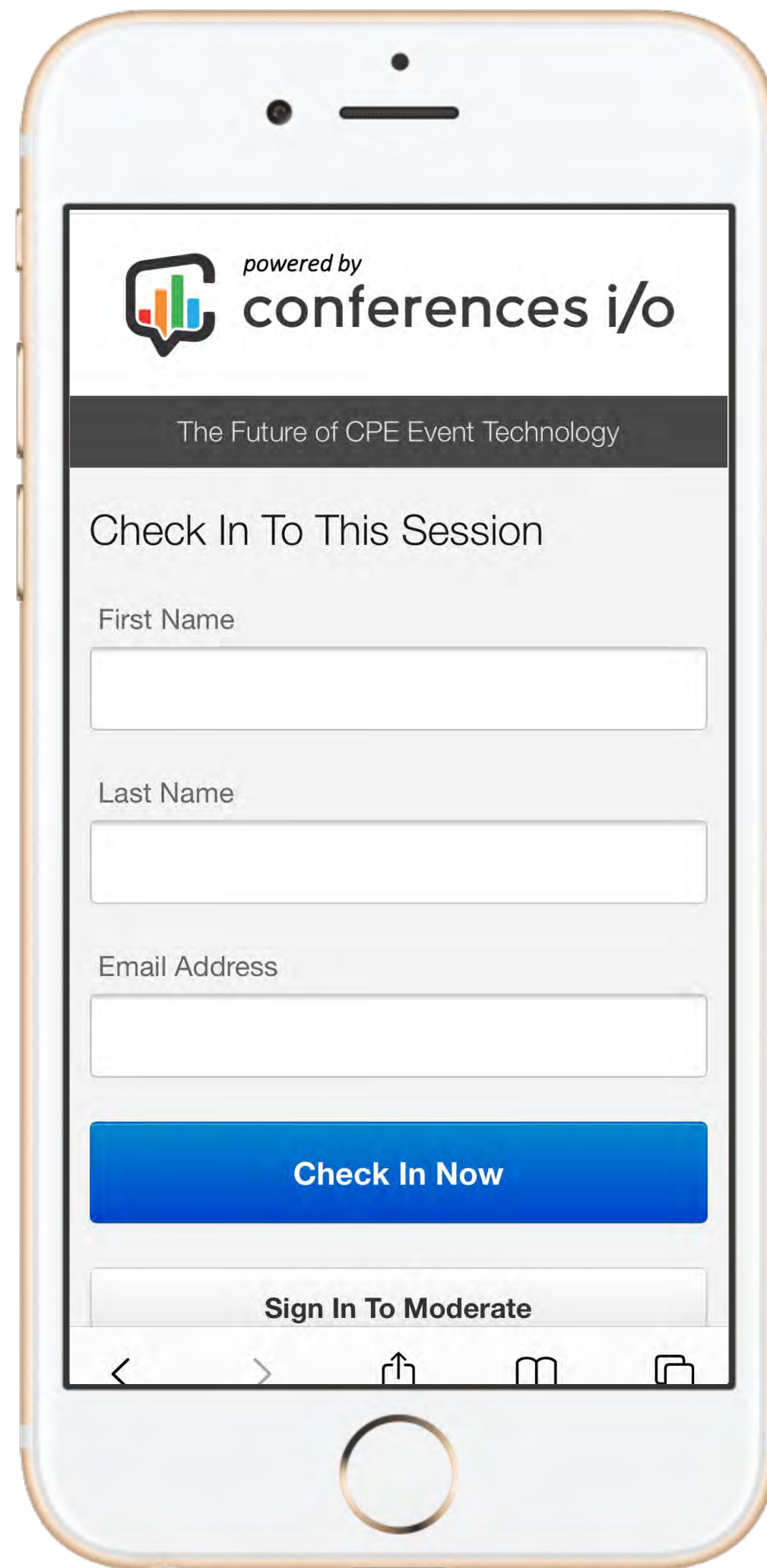
Participate at cpa.cnf.io

Self Check-in Mode

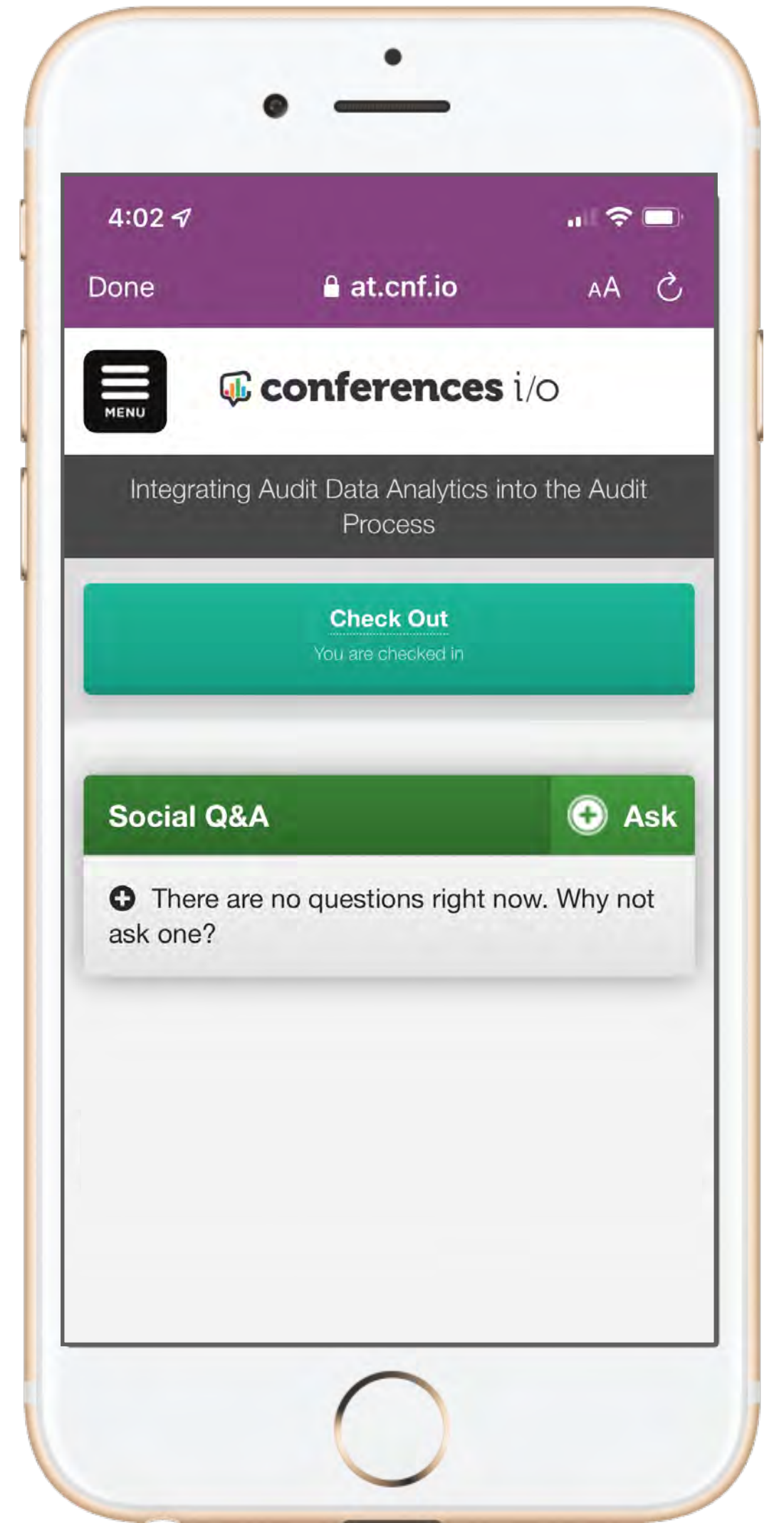
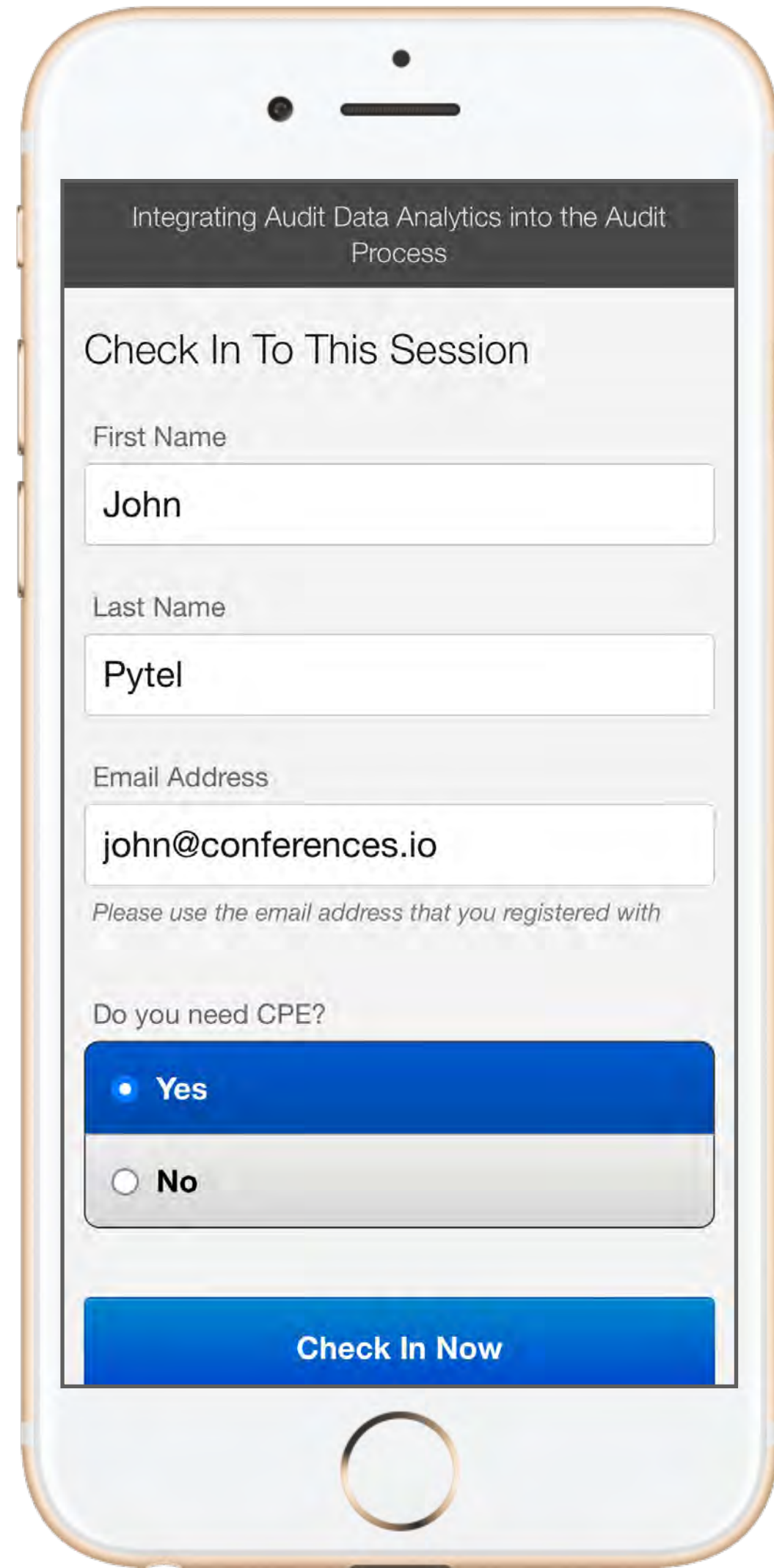
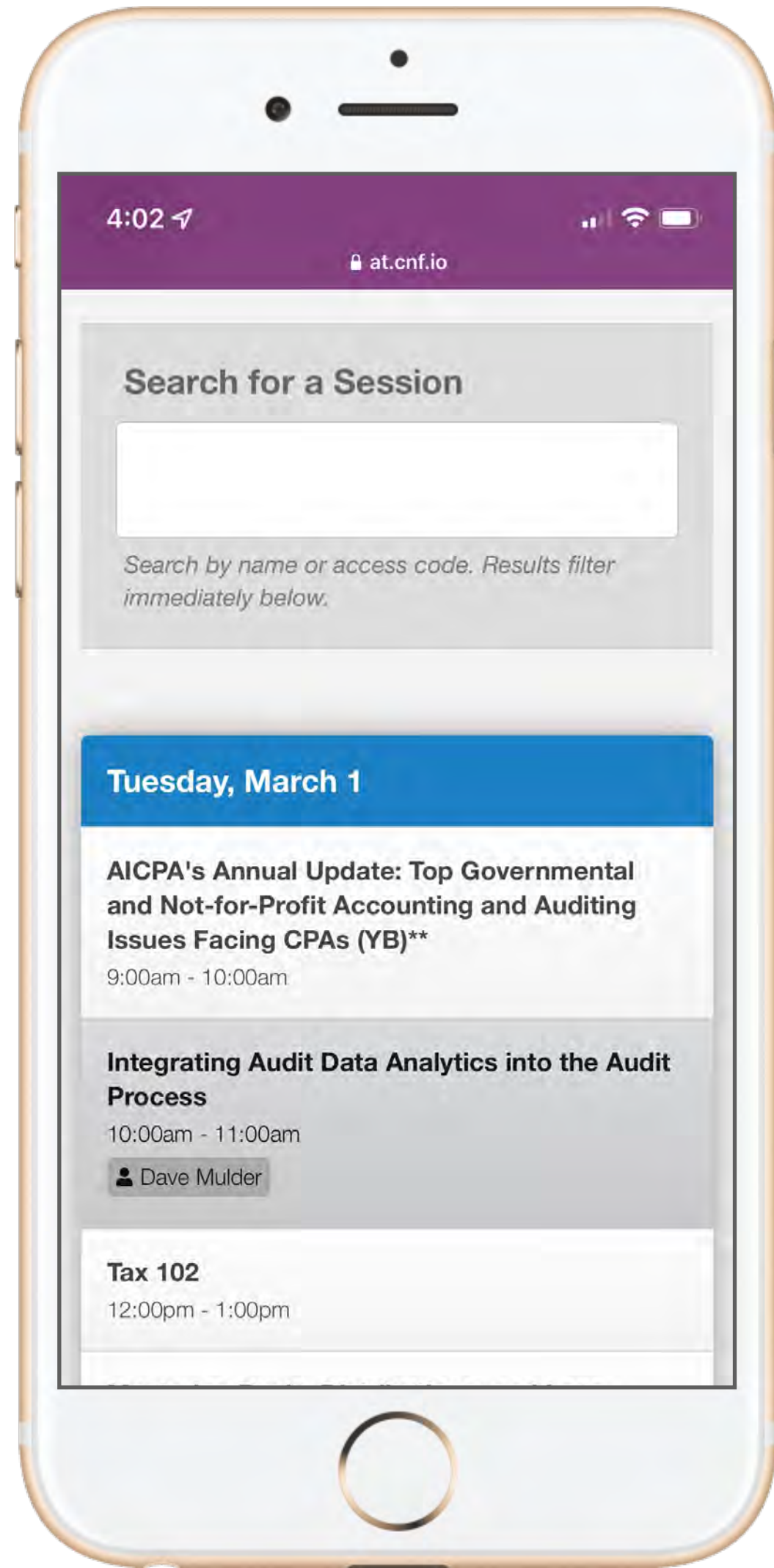
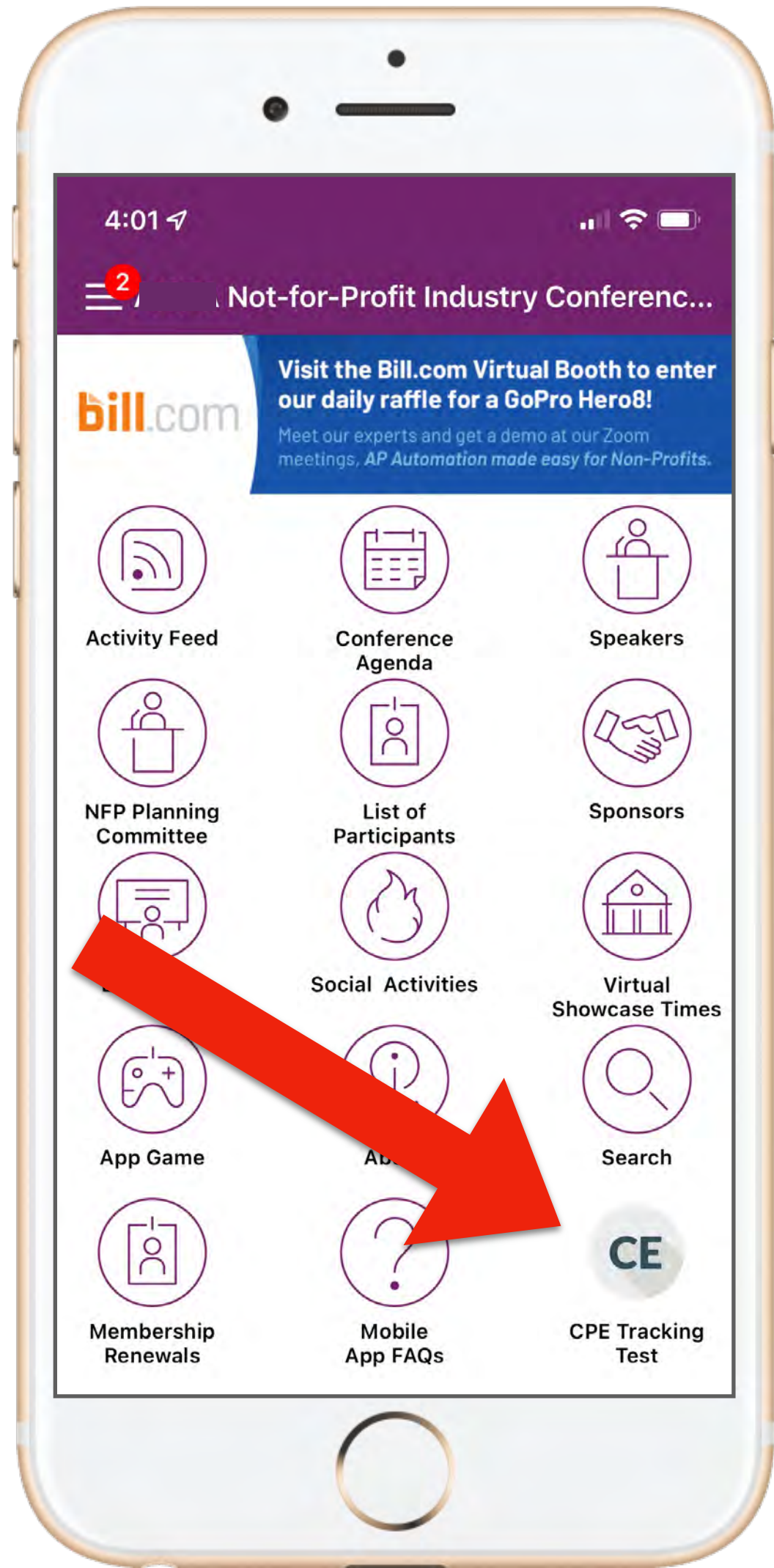
- Works for any event format
- Attendees use their own device
- Real-time check-in and check-out



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Participate at cpa.cnf.io



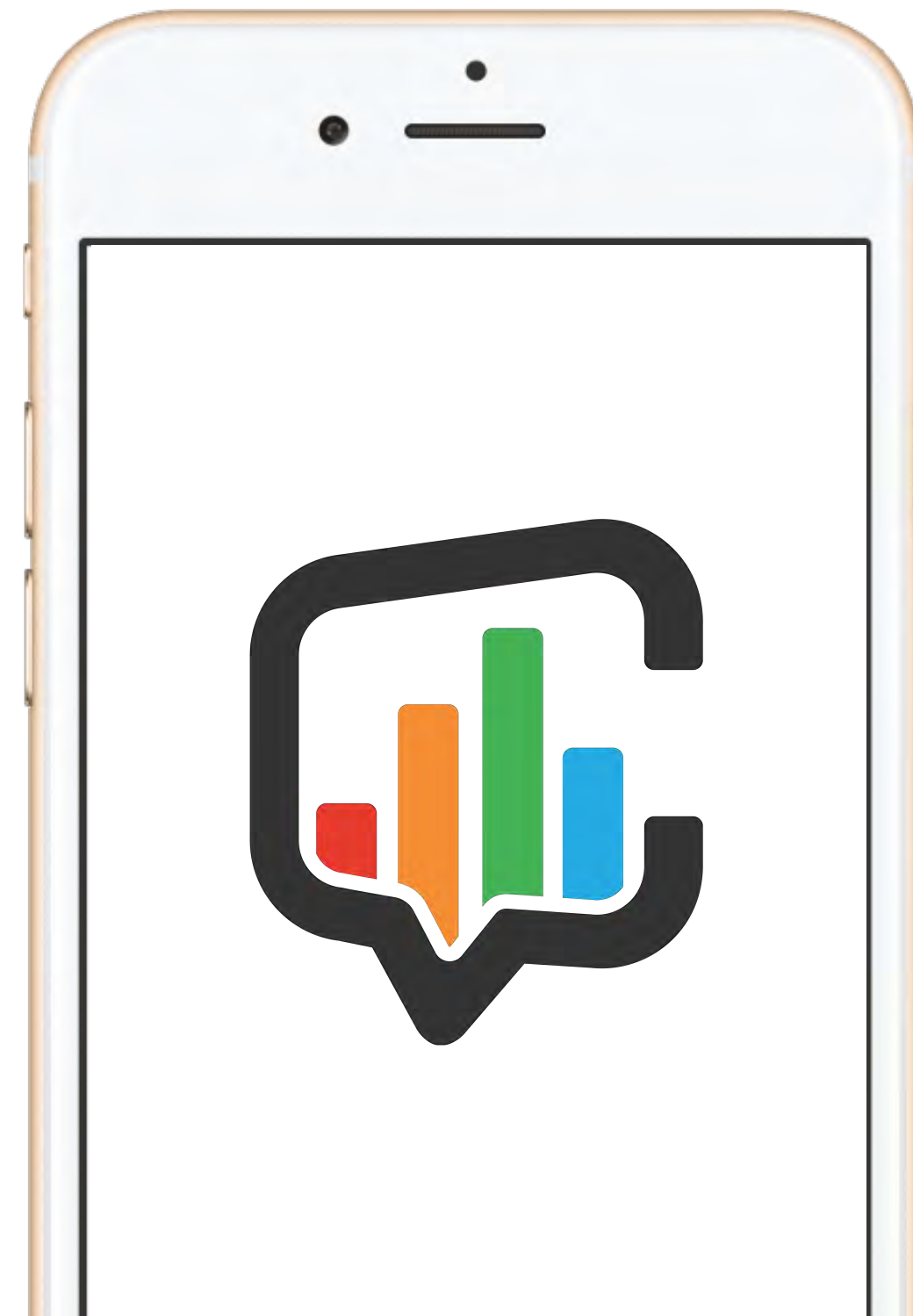
Participate at cpa.cnf.io



Group Internet (Virtual)

Poll

Which Platform(s) Does Your Organization Use For Its Virtual CPE Events?



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We know that direct integration into the virtual platforms is ideal and we do our best to make that happen whenever possible.



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Microsoft Teams Meeting App

01:15

CPE Training Session

01

02

03

04

Market

Strategy

Sales

Human Resource

31%

72%

55%

43%

how we stack up

Go Back

Add Another Response

What is one word you would use to describe yourself?

organized

best

fancy

awesome

think

fun

crazy

witty

savvy

tall

nice

strange

smart

genius

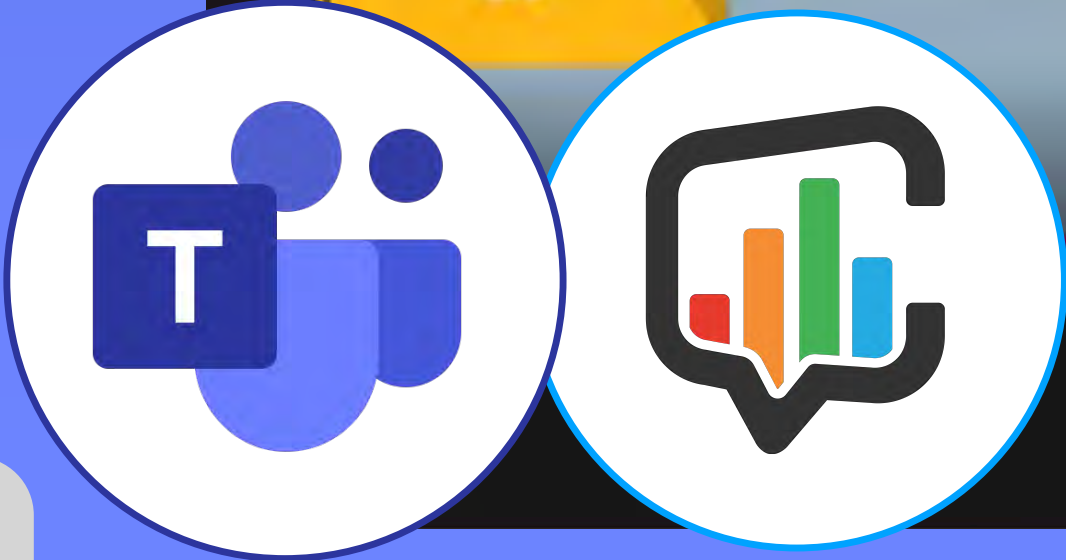
neurotic

cold

William G...

OUTSIDE

Babak Shari...



Participate at cpa.cnf.io

Webex App Now Available

Cisco Webex Meetings Meeting Info Show menu bar

powered by conferences i/o

Polls

Respond to a Poll by clicking on it

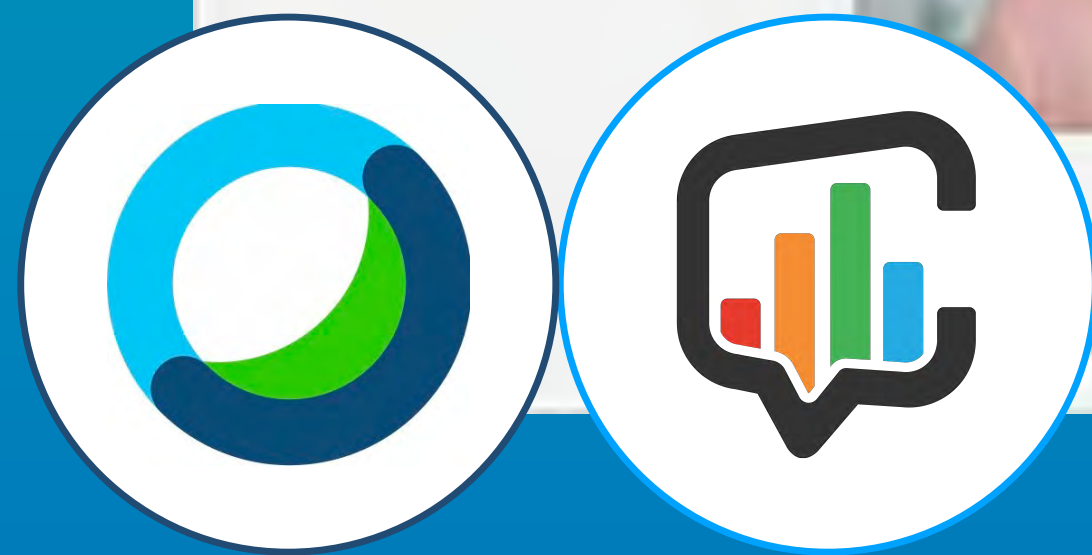
What is one word you would use to describe yourself?

Social Q&A **Ask**

Vote by clicking / tapping the arrow

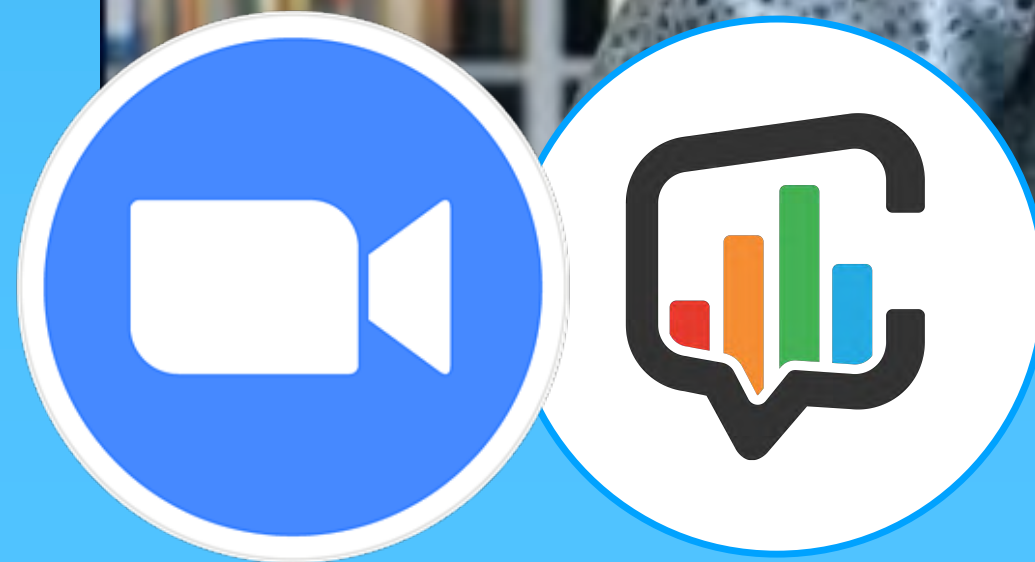
- 32 Can we use this in concurrent sessions?
Tap to see moderator's answer
- 31 How can we improve attendee engagement?
- 26 Can this be used for pre-meeting Q&A?
- 16 What data is captured from users?
- 16 Will this increase our evaluation response rates?
- 9 Are Active Learning and Engagement the same thing? for Kyle Broflovski
- 5 Where did you grow up? for Stan Marsh
Tap to see moderator's answer

Mute Stop video Share Record Breakout sessions



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Zoom App Coming... Soon



Participate at cpa.cnf.io

One to Many Format Events

powered by
conferences i/o

Which social media platforms do you use?

Facebook	81%	
Twitter	86%	
Linkedin	69%	
Pinterest	28%	
Blog	42%	

85 votes cast

85 votes cast

Mute

Start Video

Invite

Manage Participants

Share Screen

Chat

Record

Demo Session

December 18, 2020, 9:00am to 10:00am

Go Back

Which social media platforms do you use?

Mark All That Apply

Facebook

Twitter

Linkedin

Pinterest

Blog

Submit

zoom

BigMarker

YouTube
LIVEEVENTS



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Session Info

AIS

Polls

Respond to a Poll by clicking on it

What reason are you most likely to participate in an event remotely?

Social Q&A

Ask

Vote by clicking / tapping the arrow

13

When can we expect to see Hybrid Events outnumber the traditional Live Event?

10

What percent of today's events offer a Live Streaming component?

5

How does the virtual attendee participate?

Questions

Resources

Request Support

4:19pm EST

growth in wealthy Gen X

36-5

VRG CR

Year	Percentage
2013	1
2014	2
2015	3
2016	4
2017	5
2018	6
2019	7
2020	8
2021	9
2022	10
2023	11



Twitter +51

Notes

Session Support Profile Options Windows

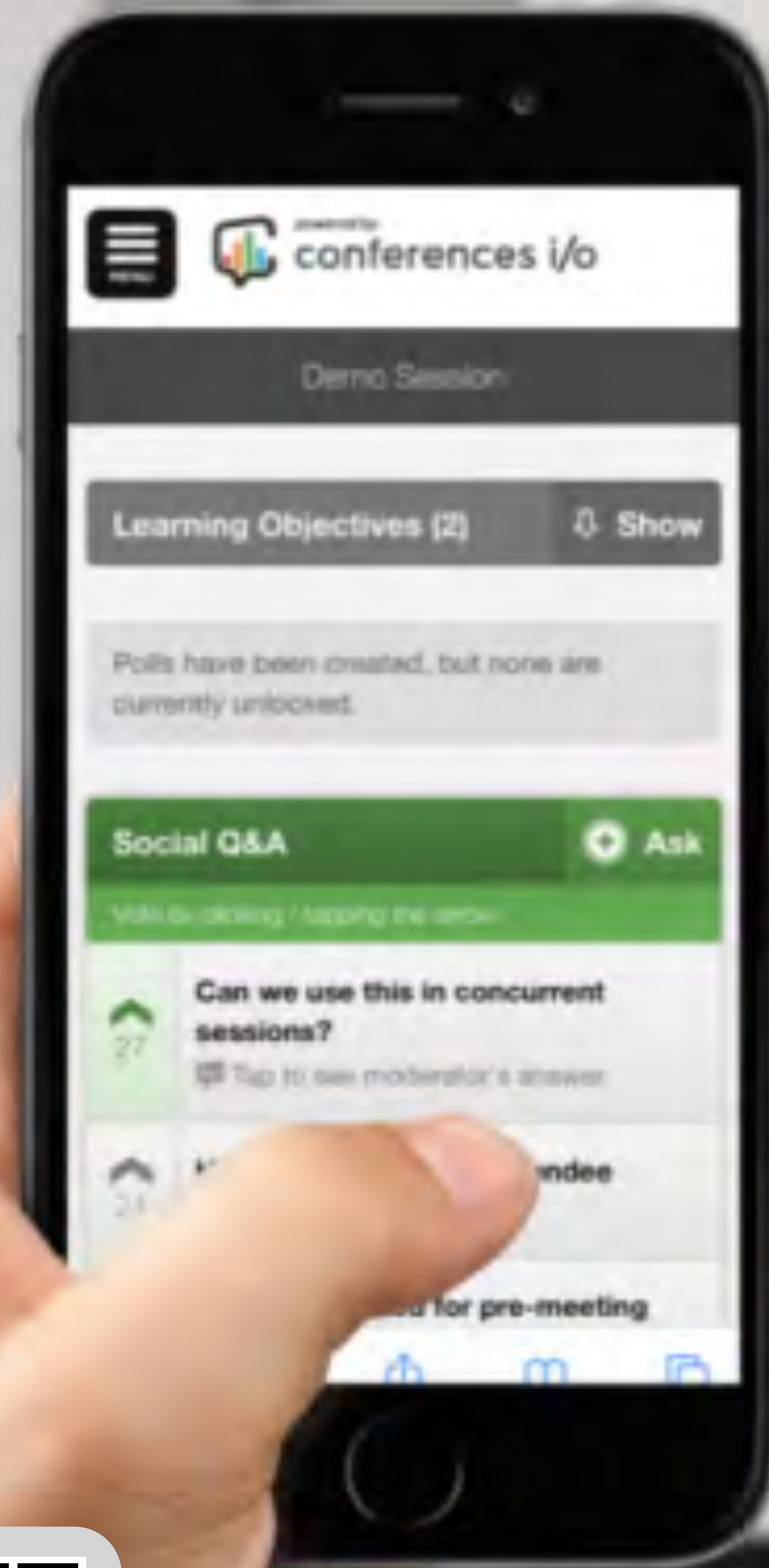


Participate at cpa.cnf.io

Open your browser
and go to:

cpa.cnf.io

OR just point your phone's
camera at the QR Code

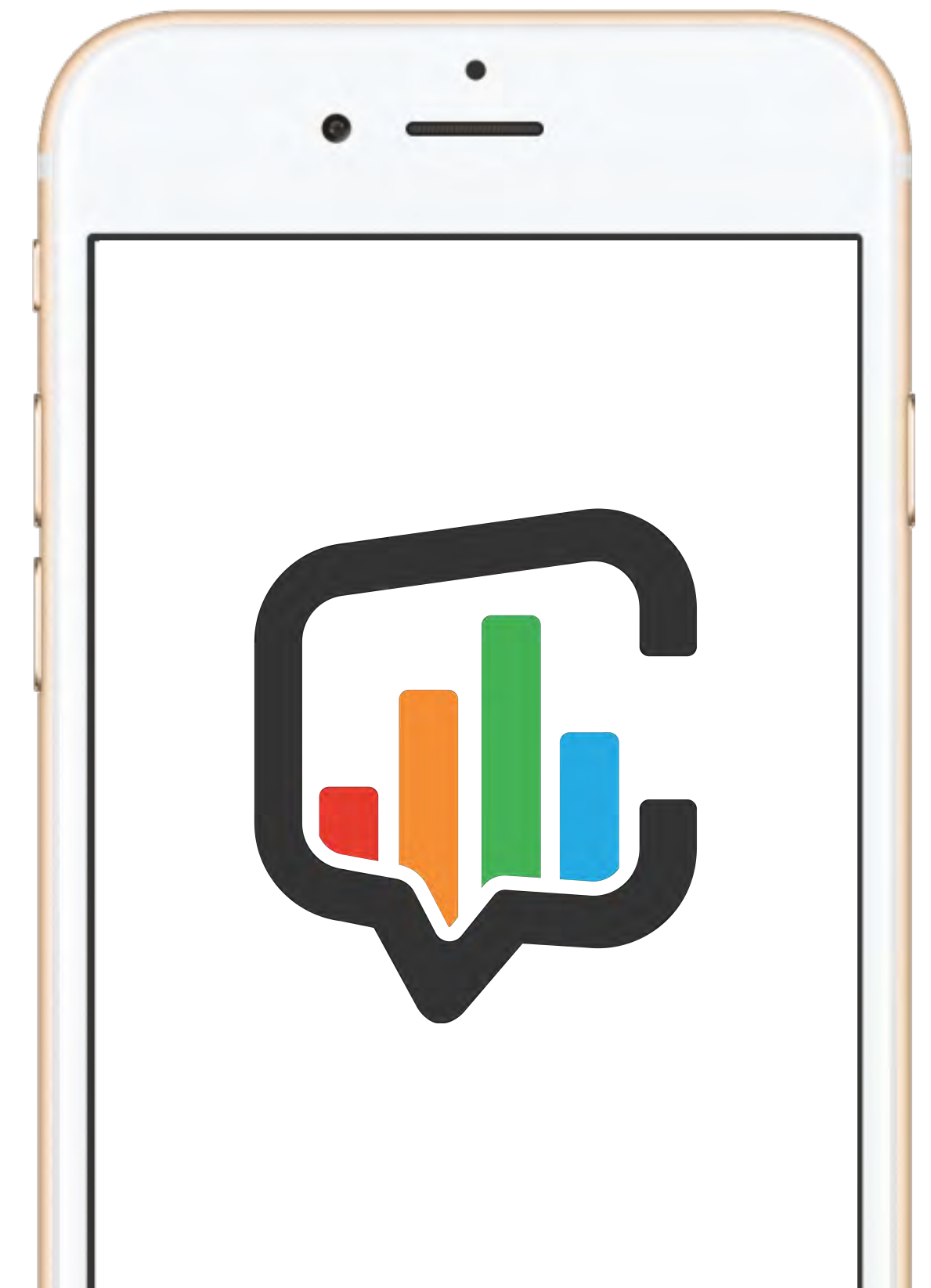


Participate at **cpa.cnf.io**

Poll

What Method Has Your Organization Been Using for the Participation Checks for Virtual CPE?

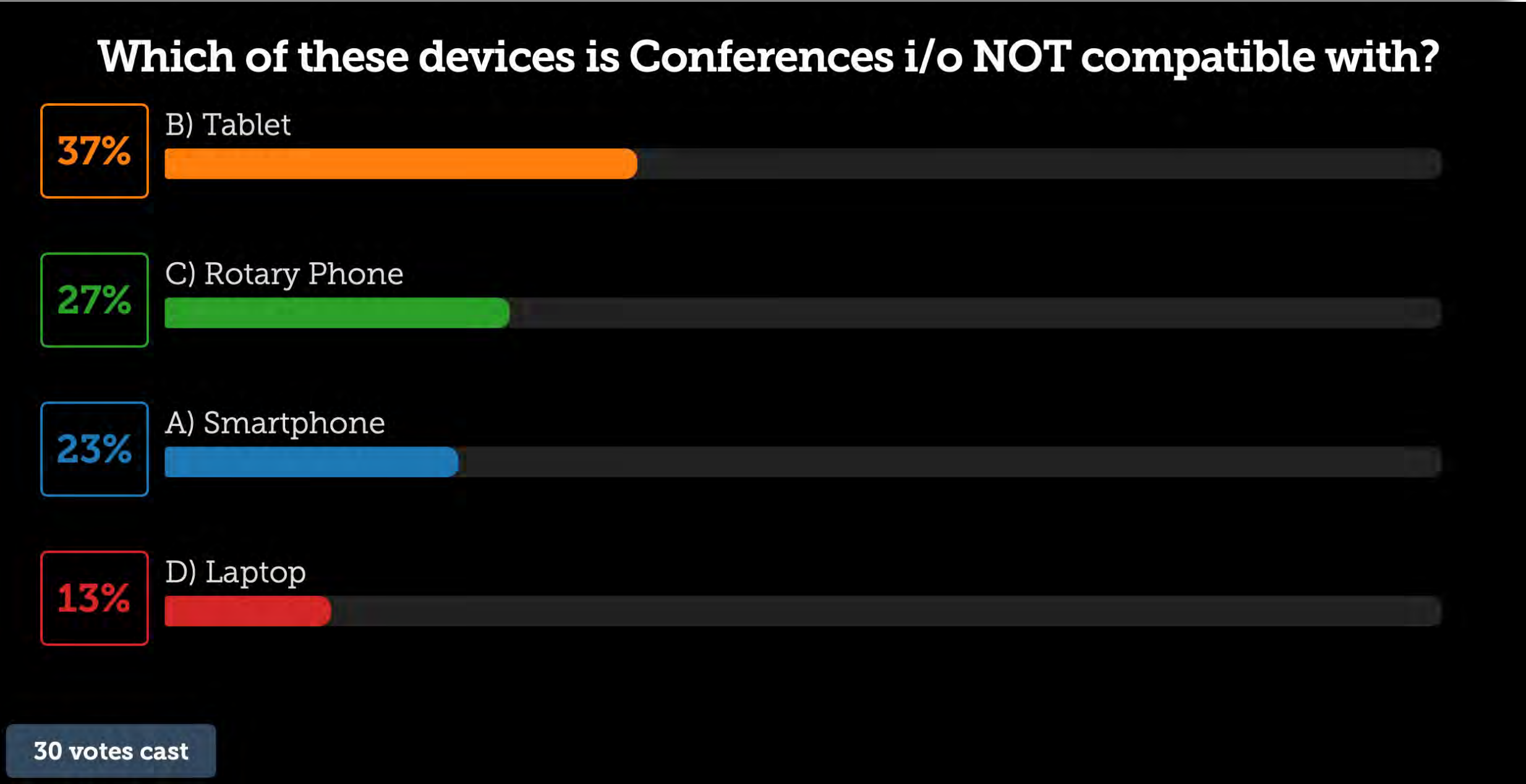
- A) Content Related Poll Questions
- B) Non Content Related Poll Questions
- C) Automated "Are you still here?" popups
- D) Codewords / Keywords
- E) Other



Participate at cpa.cnf.io



Polls



Codewords

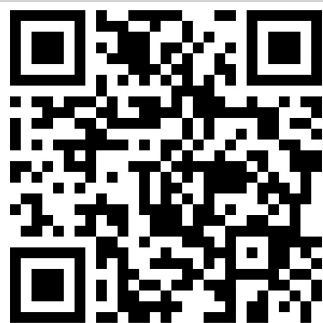
CPE Code #1

Ethics

381

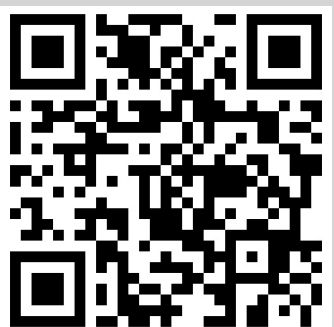
Scan QR code or navigate to <https://webinar.cnf.io>

The smartphone screen displays the 'conferences i/o' app interface. It shows a 'New Codewords Session' with a 'Check Out' button and a 'Codewords' button (0 of 8 submitted). Below this, it states 'Polls have been created, but none are currently unlocked.' There is a 'Social Q&A' section with an 'Ask' button and a message: 'There are no questions right now. Why not ask one?'. At the bottom, there is a 'Sign In To Moderate' button.



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What is your biggest takeaway from today's session?



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What is your favorite movie quote?

May the Force be with you

There's no place like home

I'm the kind of the world!

Carpe diem. Seize the day, boys. Make your lives extraordinary.

Elementary, my dear Watson

It's alive! It's alive!

My mama always said life was like a box of chocolates. You never know what you're gonna get

I'll be back

Here's looking at you, kid

You're gonna need a bigger boat

Houston, we have a problem

I wish I knew how to quit you

There's no crying in baseball

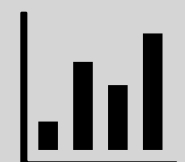
E.T. phone home

You don't understand! I coulda had class. I coulda been a contender. I could've been somebody, instead of a bum, which is what I am.

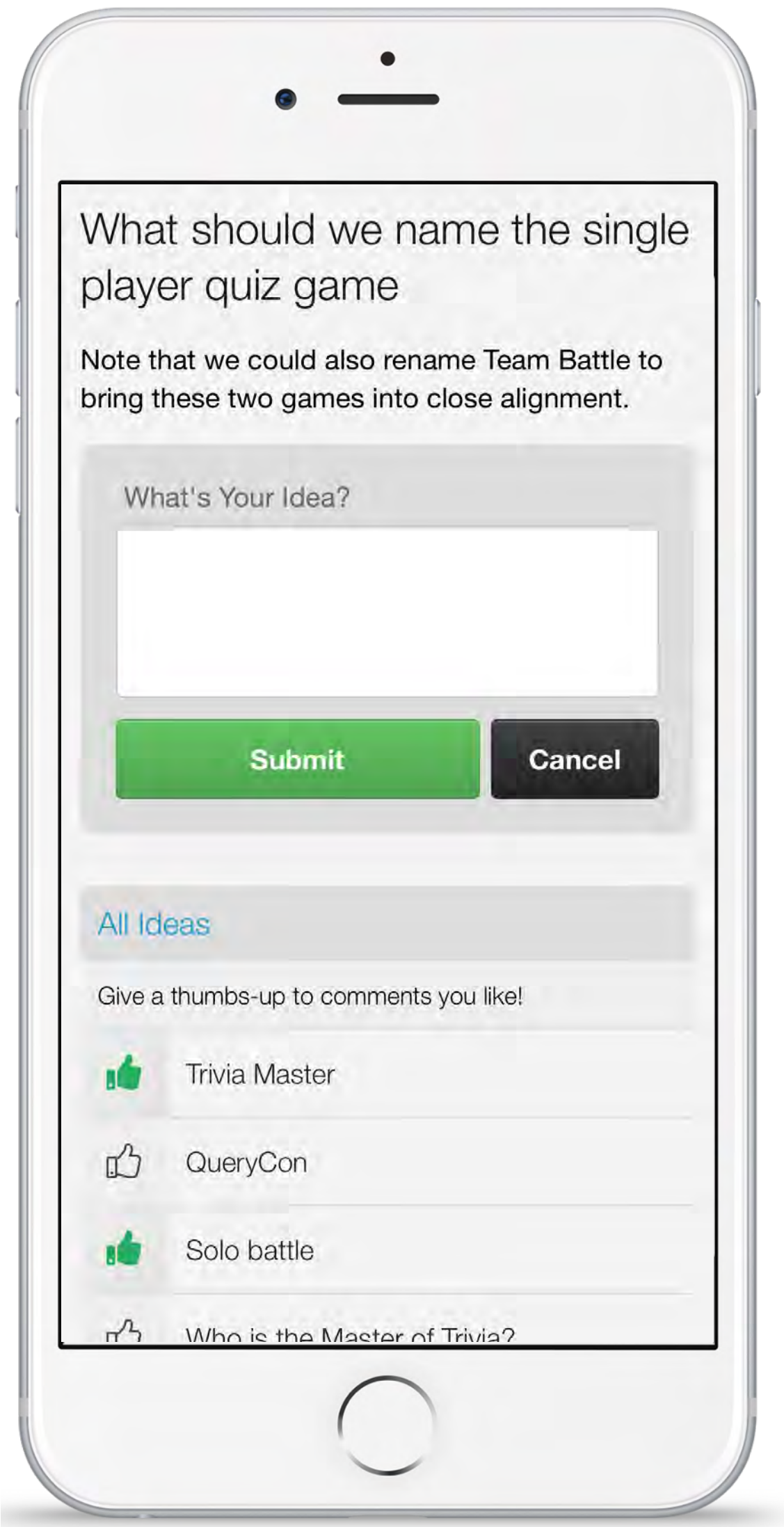
Mama always said life was like a box of chocolates. You never

Today, I consider myself the luckiest man on the face of the earth.

Badges? We ain't got no badges! We don't need no badges! I don't have to show you any stinking badges!

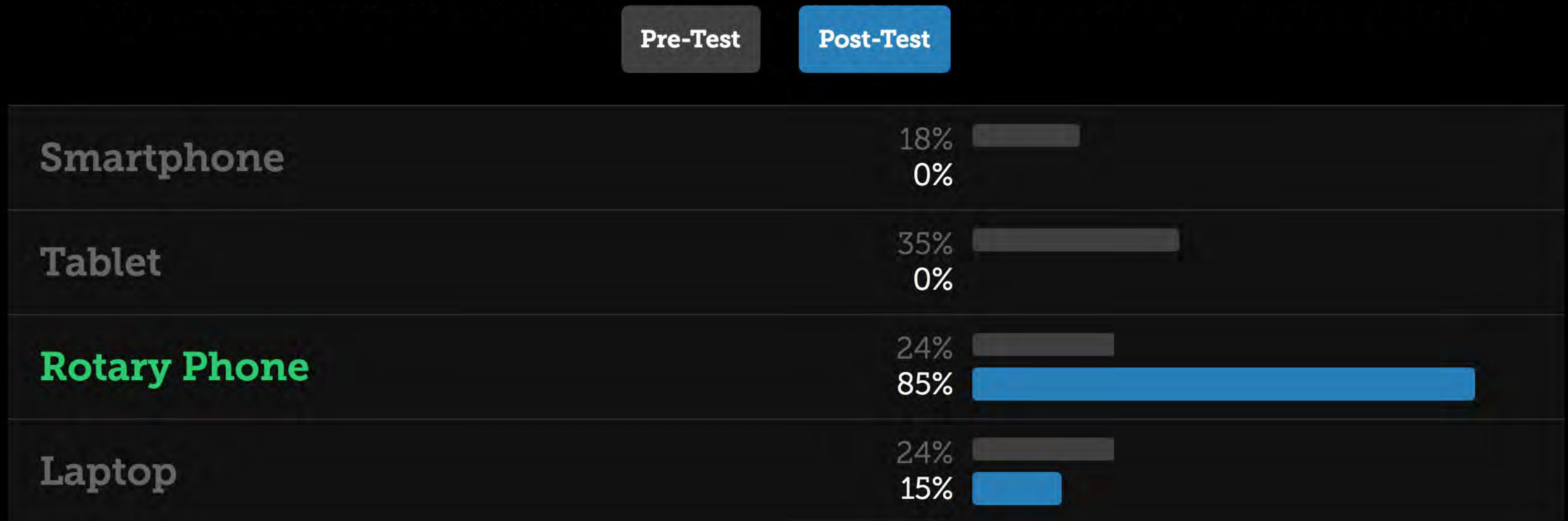


Brainstorm Polls



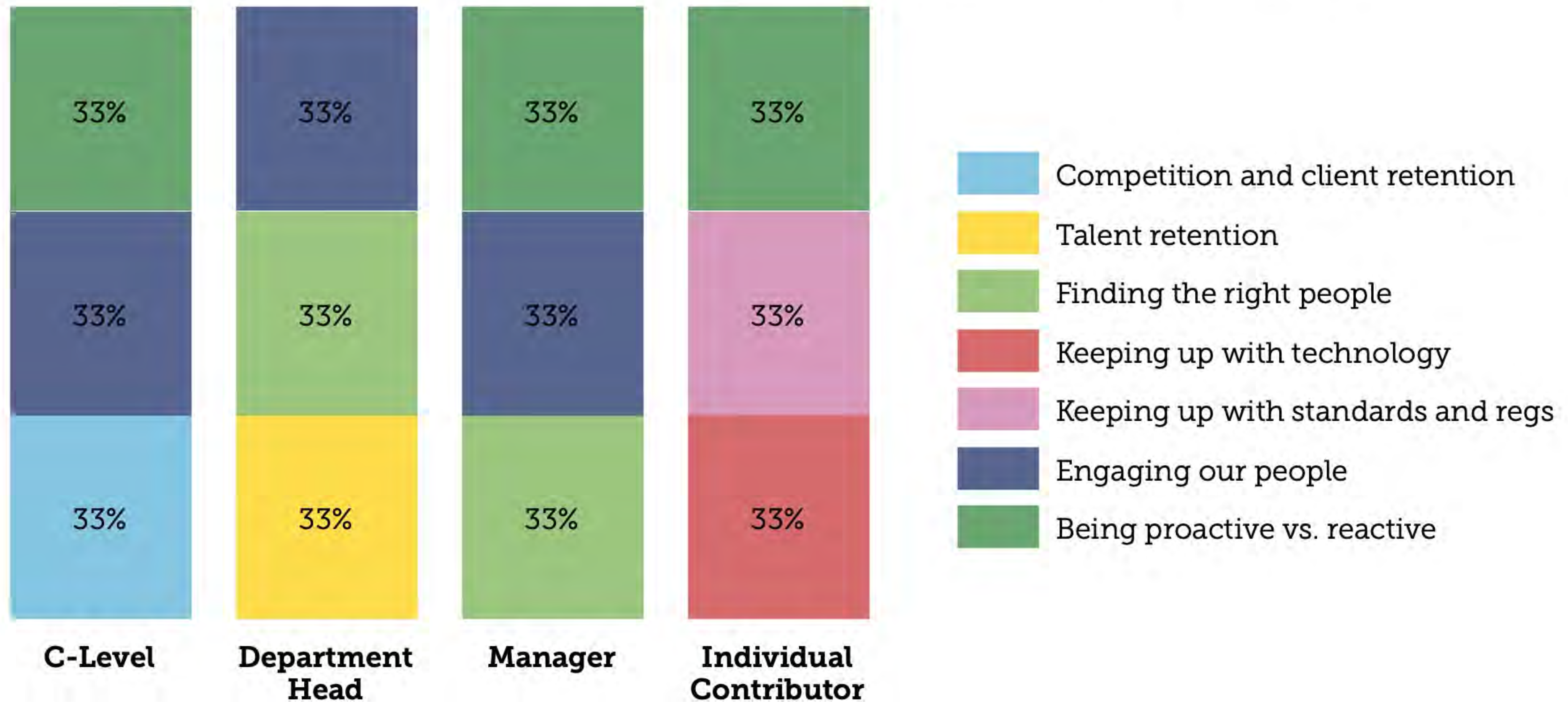
What should we name the single player quiz game		
Solo battle	Trivia Master	Quiz'em
5	3	2
Solo Clash	The Gauntlet	Trivia Battle
2	2	2
Knowledge Buster	Master of Trivia	Who is the Master of Trivia?
2	2	2

Which of these devices is Conferences i/o NOT compatible with?



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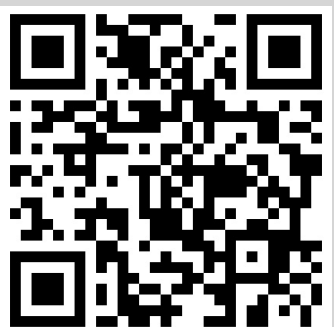
What are your 3 biggest challenges today?



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Pain Points Using Virtual Platform Polls

- ▶ Manually creating polls from scratch each time
- ▶ Instructor or moderator required to manually launch polls
 - ▶ Forgetting to launch polls
- ▶ Multi-hour sessions: Knowing which polls belong to which hour or FOS
- ▶ If no AMS integration — Compiling data can be a nightmare
- ▶ Necessity of using multiple platforms due to functionality differences / limitations



No Need to Create Polls From Scratch

Copy a Poll

This feature allows you to copy a poll from another session into this session.

1. Choose a Session

Poll Question Bank

2. Choose a Poll

✓ Select One ...

Which generation are you?

What format do you feel best suits your learning style?

What is one word you'd use to describe yourself?

From your perspective, what is our organization's biggest challenge related to CPE?

How can our organization improve our CPE offerings?

Current Polls in Session

☐

Master Demo Session

HIDDEN

Q&A PANEL

Presenters: John Pytel, Dave Mulder

View

Edit

Moderate

QR Code

More

☐

Example GIB Session (Enga

VISIBLE

View

Edit

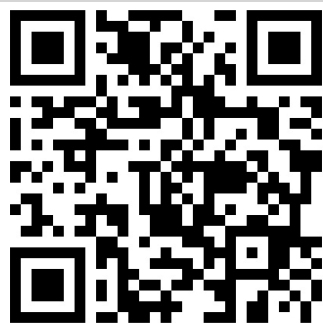
Moderate

QR C

Archive

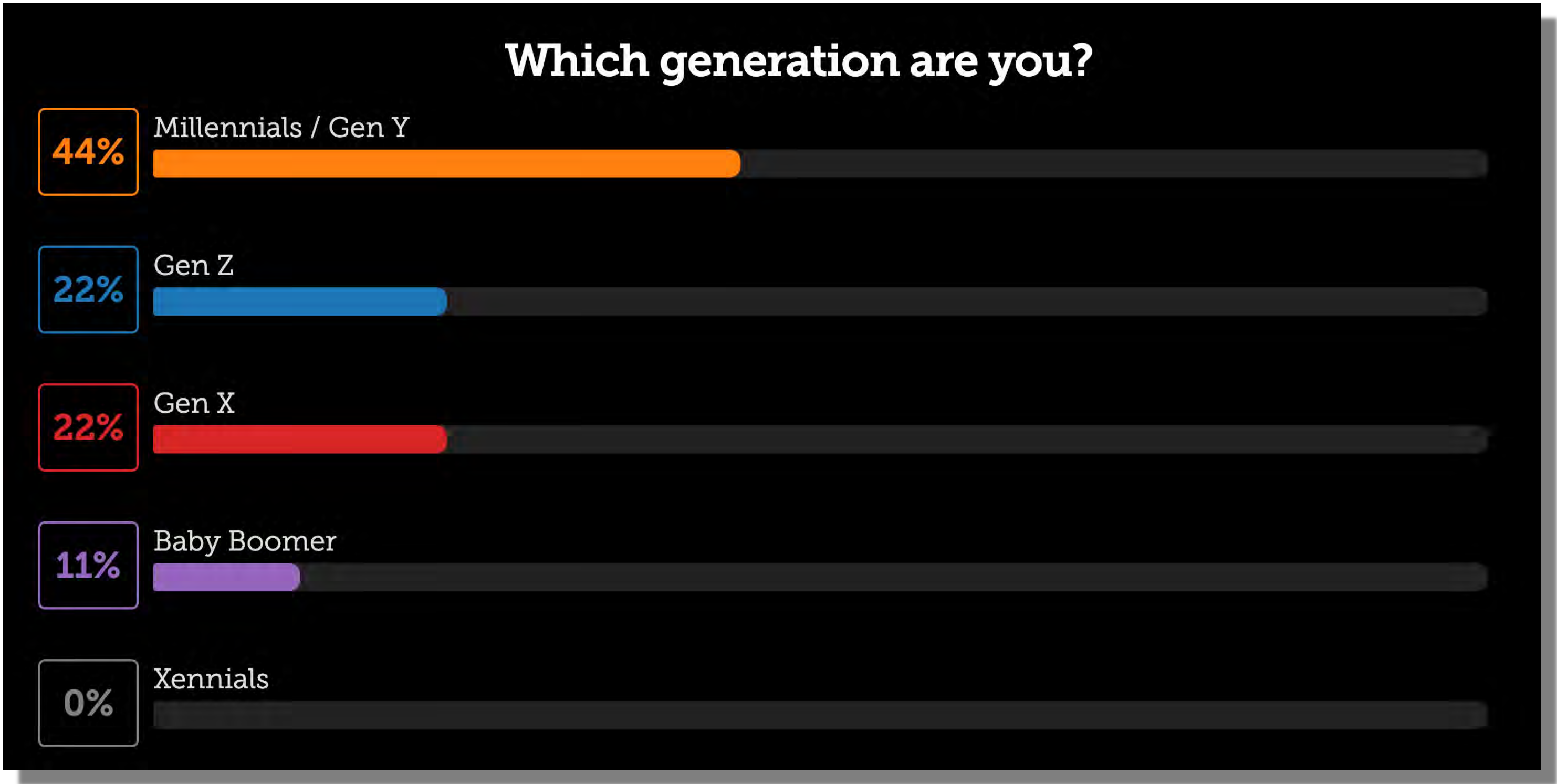
Make a Copy

Permanently Remove



Participate at cpa.cnf.io

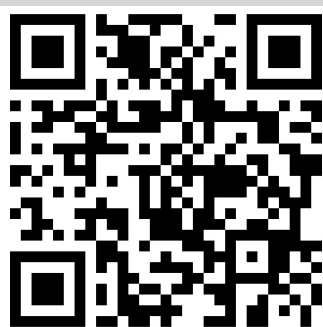
Polls integrate seamlessly and automatically launch



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Polls can be tied to a specific FOS

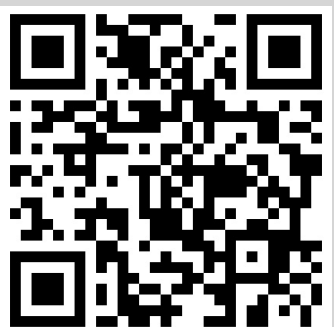
Edit Attendee Info		Duration				Send Certificate	
ATTENDEE	CHECK-IN DETAILS	CODEWORDS	POLLS RESPONDED TO	CREDITS	ELIGIBLE FOR CERTIFICATE?	ACTIONS	
Jane Smith jane.smith@cnfcpa.com Remove Edit Attendee Info	Check In - Self Check-In (No Code) Fri Feb 12, 11:40am Check Out Fri Feb 12, 1:40 pm	Auditing 4 of 4 Tax 4 of 4 Details	5 of 6 (83.33%)	Auditing 1 Tax 1 Adjust Credits	Yes Change	Download PDF Certificate Send Certificate	
Louise Burnette burnette.louise@gmail.com Remove Edit Attendee Info	Check In - Self Check-In (No Code) Wed Aug 26, 3:16pm Check Out - Admin Check-Out (self) Wed Aug 26, 4:00pm Duration		3 of 8 (37.50%)	Ethics 1 Skills 1 Adjust Credits	Yes Change	Download PDF Certificate Send	



Participate at cpa.cnf.io

No Messy Data or Manual Creation of Certificates

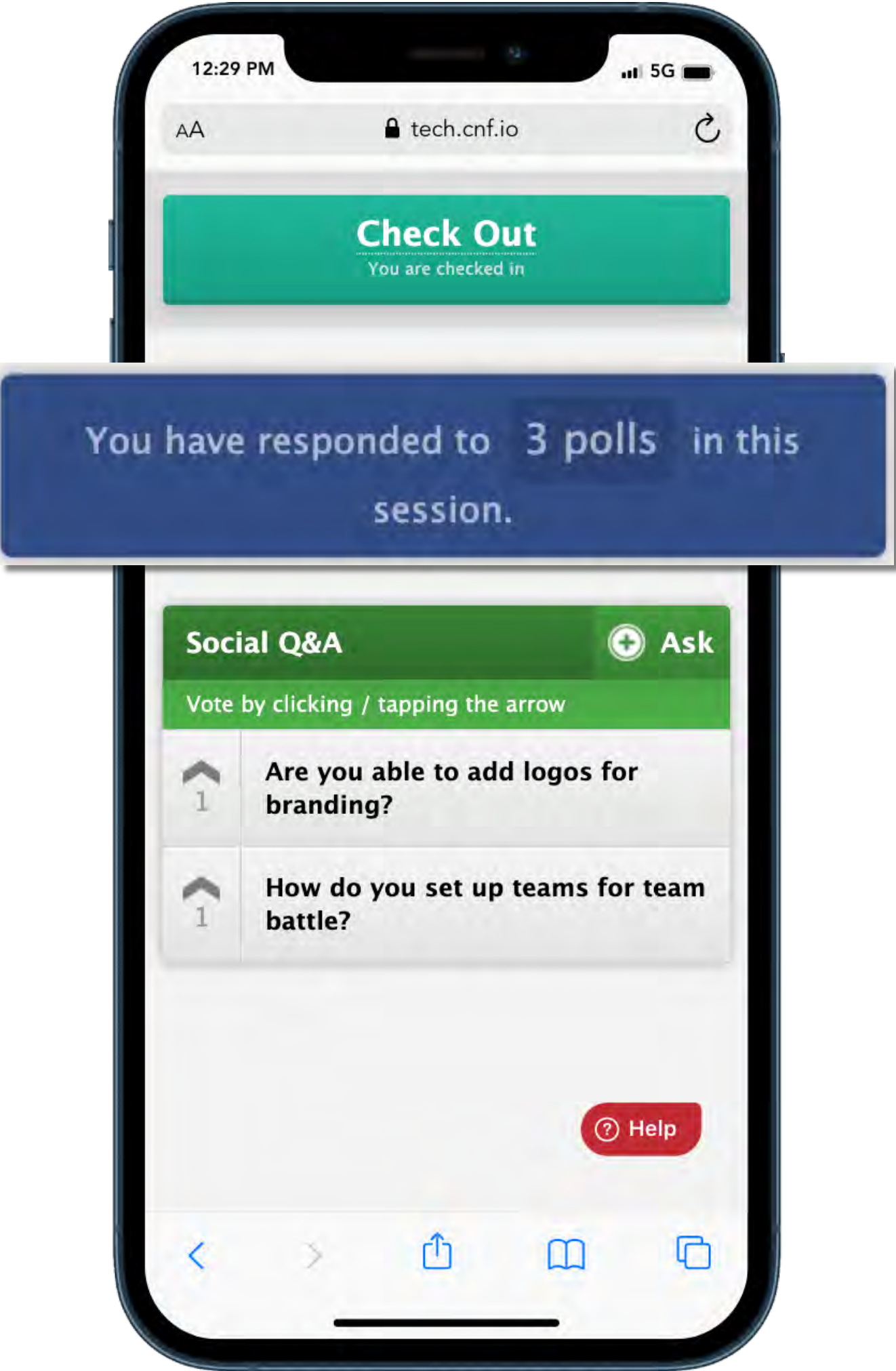
- Reporting designed specifically for CPE
- Auto credit calculation
- Direct Integration to AMS
- Automated certificate creation and delivery (if needed)



Audio Alerts For Polls



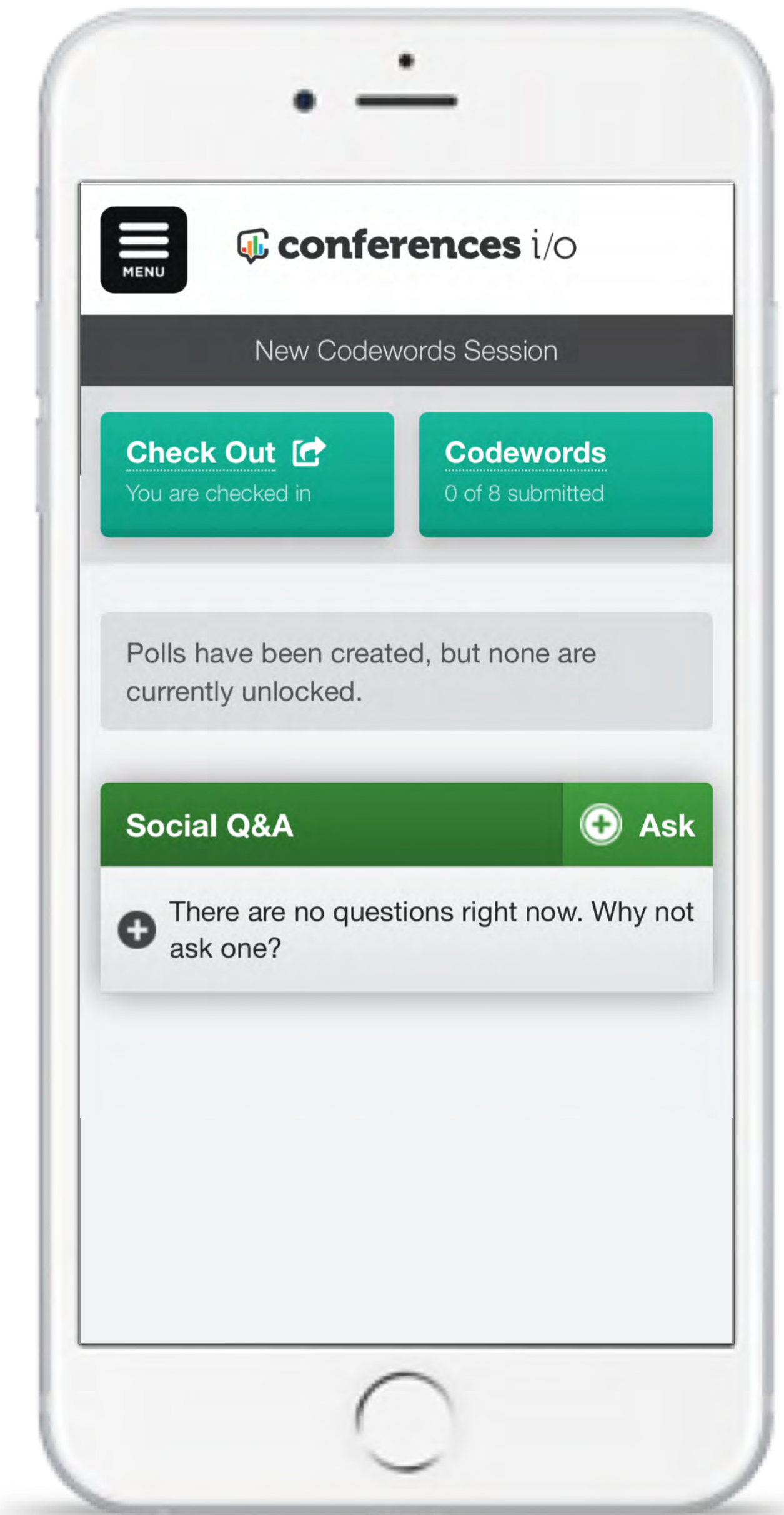
Poll Completions Indicator



Participate at cpa.cnf.io

Meet Codewords.

Our Newest Attendance Tracking Solution



Participate at cpa.cnf.io

Codewords

- 381 (Ethics)
- 754 (Ethics)
- 598 (Ethics)
- 231 (Ethics)
- 846 (Skills)
- 921 (Skills)
- 927 (Skills)
- 565 (Skills)

Close


Download Slides

Auto-generated Codes

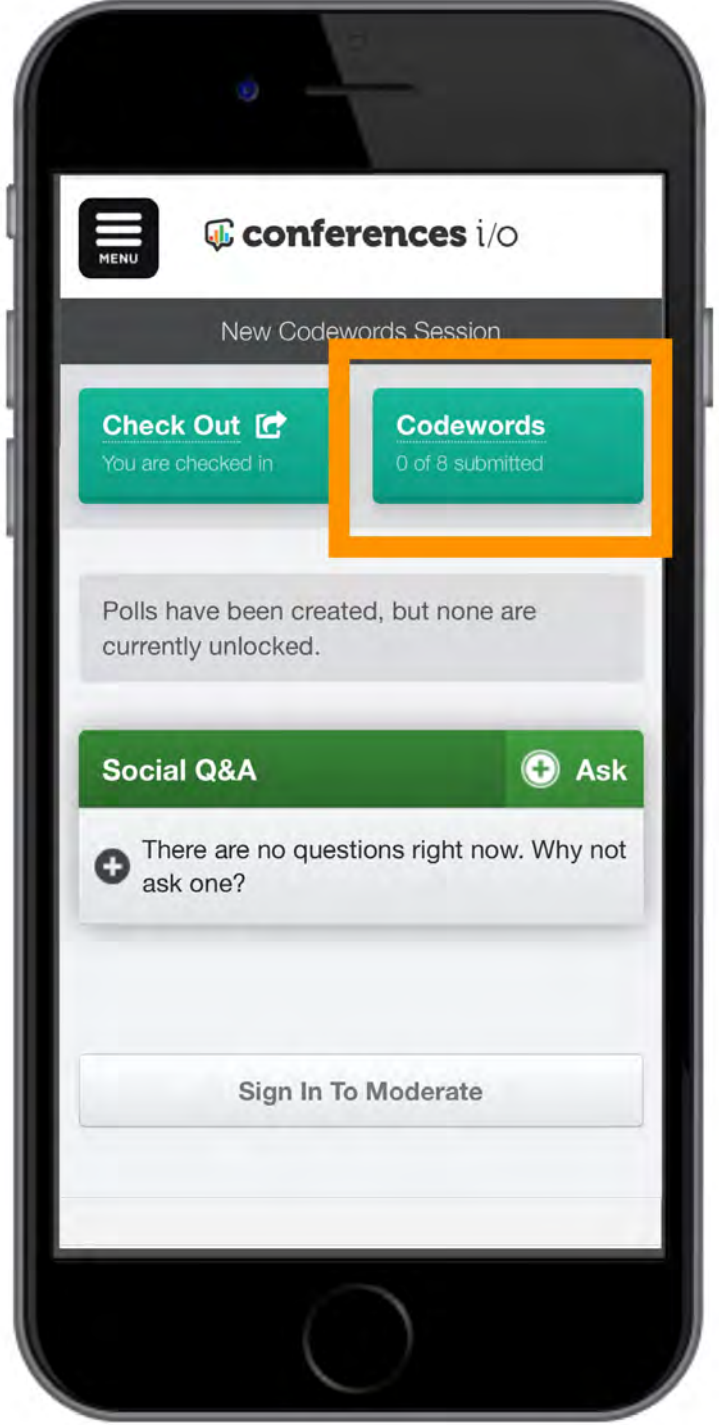
CPE Code #1

Ethics

381



Scan QR code or navigate to <https://webinar.cnf.io>



Auto-generated PowerPoint Slides



Participate at cpa.cnf.io

AutoSave OFF Presentation (42)

Home Insert Draw Design Transitions Animations Slide Show Review View Tell me

Paste Cut Copy Format New Slide Layout Reset Section

Calibri 30 A⁺ A⁻ B I U x² x₂ AV Aa

Convert to SmartArt Picture Shapes Text Box Arrange Quick Styles Shape Fill Shape Outline Design Ideas

1 AT.CNF.IO

2 Codeword #1 Auditing 392

3 Codeword #2 Auditing 608

4 Codeword #3 Auditing 962

5 Codeword #4 Auditing 302

6 Don't Forget To Check-Out Before

Codeword #1 Auditing

392

Scan QR code or navigate to <https://exampleapp.cnf.io>

conferences i/o

New Codewords Session

Check Out You are checked in

Codewords 0 of 8 submitted

Polls have been created, but none are currently unlocked.

Social Q&A Ask

There are no questions right now. Why not ask one?

Sign In To Moderate

Slide 2 of 6 English (United States)

Notes Comments 110%



Participate at cpa.cnf.io

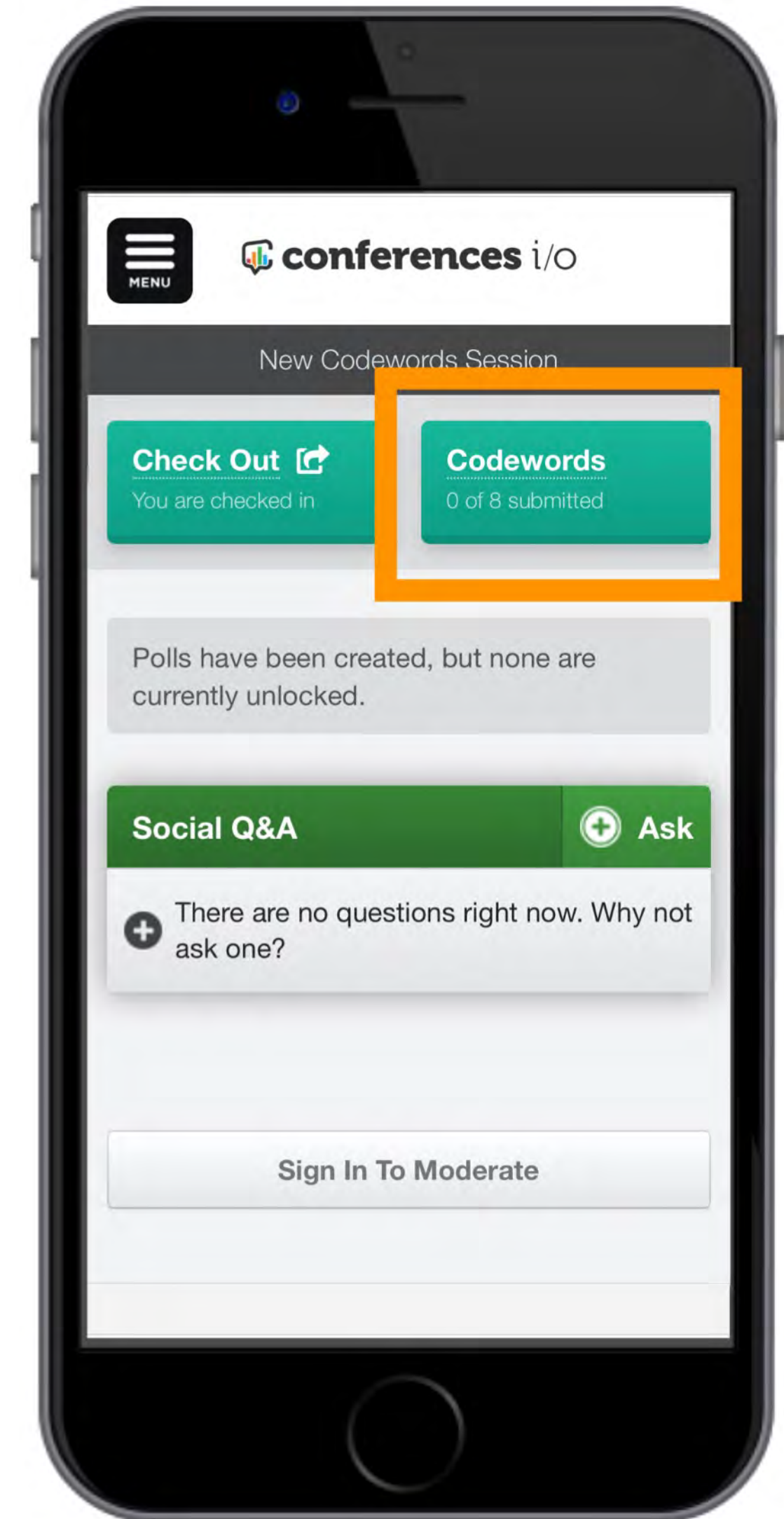
Codeword #1

CPE

524



Scan QR code or navigate to
<https://cpa.cnf.io>






Hybrid

Conferences i/o bridges the gap to allow everyone to participate TOGETHER. Regardless of how they're attending.



Participate at cpa.cnf.io

Check-in the same way

 **conferences i/o**

Training Session

Check In To This Session

First Name

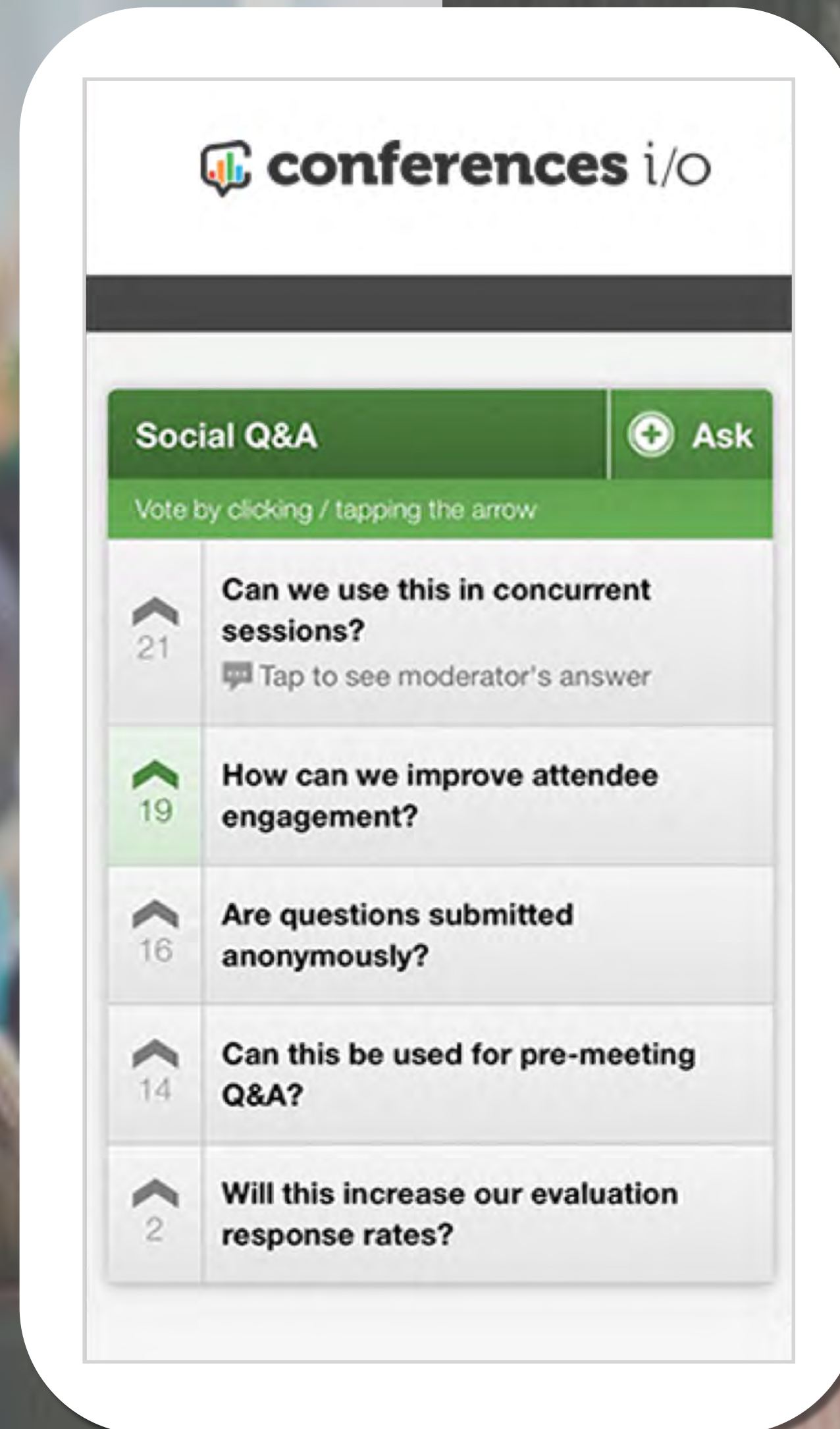
Last Name

Email Address

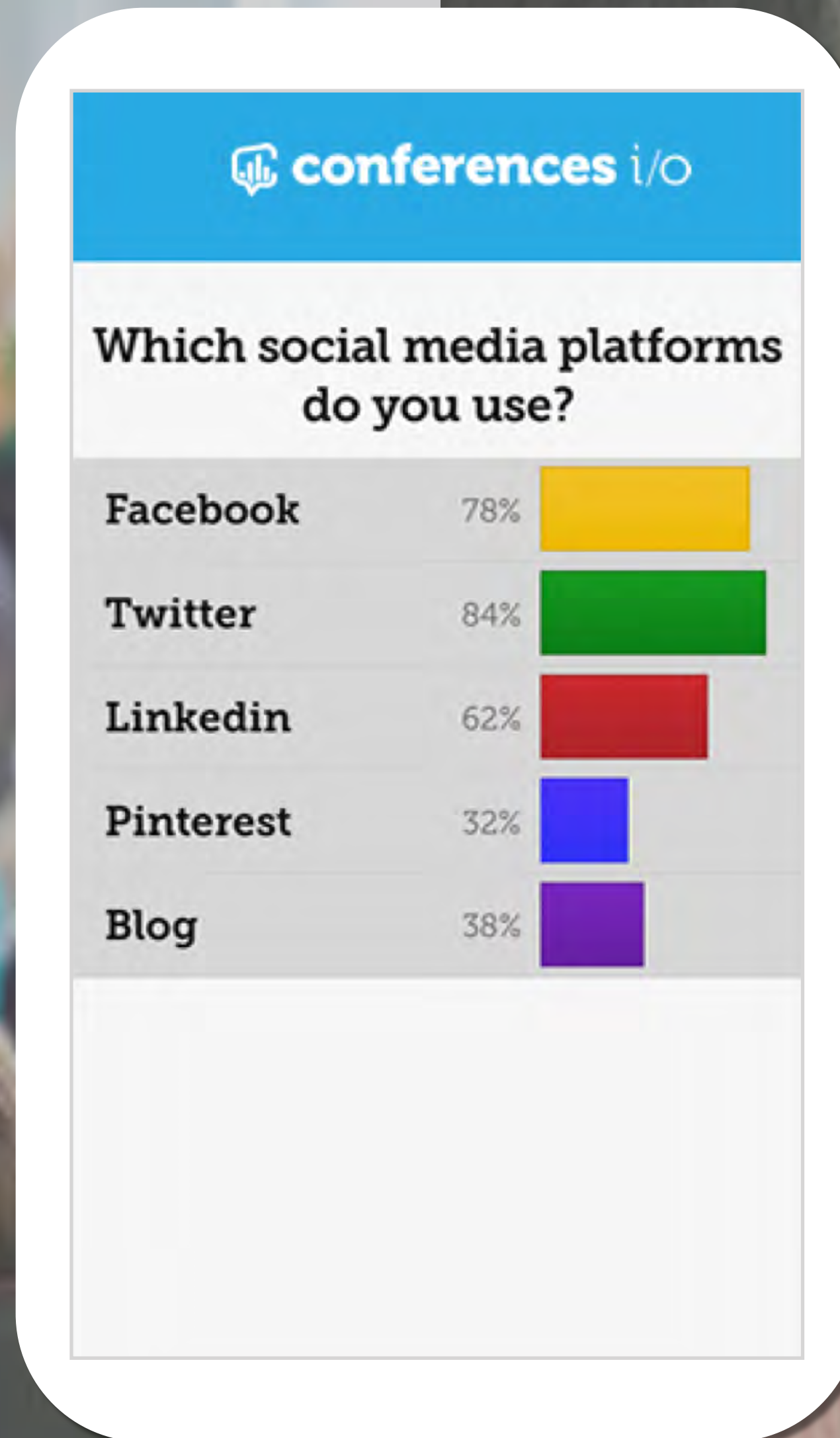
Please use the email address that you registered with

Check In Now

Participate in the same Q&A



Respond to the same polls



When the Delivery Format for a session is set to Hybrid...



Edit a Session - Attendance Tr

at.cnf.io/admin/edit_session/265929

Update

Attendee Check-Out Code (optional)

If a check-out code is set, attendees must successfully enter the check-out code before checking out from the session.

Delivery Format

Hybrid

CE Minutes (optional)

The total number of minutes associated with continuing education (CE) minutes in this session. This value is optional but will help Conferences i/o calculate attendance earned by attendees.

Fields of Study

Field of Study	Credits
Auditing	1
Field of Study	Credits
Field of Study	Credits

Attendees will be prompted to select their Attendance Method upon checking-in



Attendance Tracking

at.cnf.io/sessions/y7... Update

MENU

Hybrid Session Example

Check In To This Session

First Name

John

Last Name

Pytel

Email Address

john@conferences.io

Please use the email address that you registered with

Attendance Method

☐ In-Person

☐ Virtual

Check In Now

Admins are able to identify whether each person attended in-person or virtually

Session Attendance: Hybrid Se

at.cnf.io/admin/session_attendance/2...

Session Attendance

Hybrid Session Example

SHOW SIDEBAR

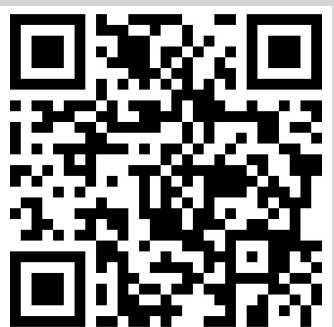
Filter Attendees

You can filter by any information

Sort: Last Name (A to Z)

ATTENDEE	CHECK-IN DETAILS	CODewORDS	POLLS RESPONDED TO	CREDITS	ELIGIBLE FOR CERTIFICATE?	ACTIONS
<div><div>Jane Doe</div><div>jdoe@conferences.io</div><div>EditRemove</div></div>	<div>Check In – Self Check-In (No Code)</div> <div>Mon Nov 08, 2:02pm</div> <div>Check Out –</div> <div>Delivery Format In-person</div>	<div>Auditing 0 of 4</div> <div>Details</div>	<div>0 of 0 (0%)</div>	<div>Auditing 1</div> <div>Adjust Credits</div>	<div>Yes</div> <div>Change</div>	<div>Download PDF Certificate</div> <div>Send Certificate</div>
<div><div>John Pytel</div><div>john@conferences.io</div><div>EditRemove</div></div>	<div>Check In – Self Check-In (No Code)</div> <div>Mon Nov 08, 2:02pm</div> <div>Check Out –</div> <div>Delivery Format Virtual</div>	<div>Auditing 0 of 4</div> <div>Details</div>	<div>0 of 0 (0%)</div>	<div>Auditing 1</div> <div>Adjust Credits</div>	<div>Yes</div> <div>Change</div>	<div>Download PDF Certificate</div> <div>Send Certificate</div>

CPE Attendance Reporting



Participate at cpa.cnf.io

Attendance Reporting

Session Attendance: Federal T x +

at.cnf.io/admin/session_attendance/276394

Update

Go Back to Manage Sessions

Session Attendance

Federal Tax Update – Morning Session

SHOW SIDEBAR

Filter Attendees

You can filter by any information

ATTENDEE	CHECK-IN DETAILS	CODEWORDS	POLLS RESPONDED TO	CREDITS	ELIGIBLE FOR CERTIFICATE?	ACTIONS
<div>John Pytel</div> <div>john@conferences.io</div> <div>Edit Remove</div>	<div>Check In – Self Check-In (No Code)</div> <div>Tue Dec 14, 9:16am</div> <div>Check Out – Admin Bulk Check-Out (self)</div> <div>Tue Dec 14, 10:15am</div> <div>Duration / In-Session Time</div> <div>58 minutes</div>	<div>Tax</div> <div>3 of 3</div> <div>Details</div>	<div>3 of 3 (100.00%)</div>	<div>Taxes 1</div> <div>Adjust Credits</div>	<div>Yes</div> <div>Change</div>	<div>Download PDF Certificate</div> <div>Send Certificate</div>



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Auto Credit Adjustment

Manual bulk credit adjustment

at.cnf.io/admin/credit_adjustment/276010

Manual bulk credit adjustment for a session

This tool will bulk-adjust credits for learners within a single session, based on their polling or codewords activity. It works best when reconciling attendance after a session has concluded.

Adjustment will only be made to current check-ins. If there will be additional check-ins to this session, you will need to run this tool again.

Session Name	CPE Training Session
Session Date	Tuesday, December 7, 2021
Session Length	60 minutes
Fields of Study & Credits	Tax – 1 credits

At least this many minutes spent in the session for full credit

50

Length of session: 60 minutes



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Use polls

Full credit for each field of study will be given to learners responding to at least this many polls in the session. Learners responding to fewer polls will be adjusted to zero credit.

At least this many polls completed for full credit

of polls in session: 8



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Manual bulk credit adjustment

at.cnf.io/admin/credit_adjustment/276010

Manual bulk credit adjustment for a session

This tool will bulk-adjust credits for learners within a single session, based on their polling or codewords activity. It works best when reconciling attendance after a session

Use codewords

Full credit for each field of study will be given to learners submitting at least this many valid codewords in the session. When a learner has submitted fewer codewords, they will be adjusted to zero credit for that specific field of study.

At least this many of codewords completed for **Tax**

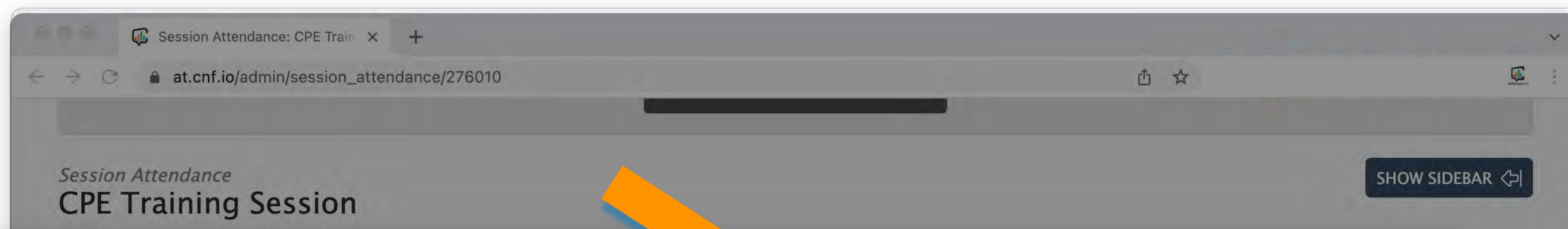
Tax has 3 codewords and 1 credit in this session

At least this many of codewords completed for **Auditing**

Auditing has 3 codewords and 1 credit in this session



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Bob Smith bsmith@gmcp.com Edit Remove	Check In – Self Check-In (No Code) Fri Feb 19, 11:47am	Auditing 4 of 4 Tax 0 of 4 Details	5 (50.0%)	Auditing 1 Tax 0 Adjust Credits	Yes Change	Download PDF Certificate
	Check Out – Standard Session Checkout Fri Feb 19, 11:52am					
Jane Thomas jthomas@examplecpa.com Edit Remove	Check In – Self Check-In (No Code) Fri Feb 19, 2:23pm	Auditing 4 of 4 Tax 4 of 4 Details	0 of 6 (0.00%)	Auditing 1 Tax 1 Adjust Credits	Yes Change	Download PDF Certificate
	Check Out – Admin Bulk Check-Out (self) Fri Feb 19, 4:30pm					Send Certificate



Participate at cpa.cnf.io

Partial Credit Adjustment (coming soon)

Add a new credit calculation template

Maximum number of credits possible

4.0

Codewords ruleset

Maximum number of codewords

16

4.0 credits	12 or more codewords	Remove
3.5 credits	9, 10, or 11 codewords	Remove
3.0 credits	8 codewords	Remove

+ Add a new rule

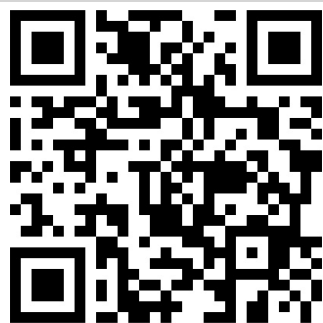
Polls ruleset

No rules for polls have been added.

Time attended ruleset

No rules for time attended have been added.

4.0 credits	12 or more codewords	Remove
3.5 credits	9, 10, or 11 codewords	Remove
3.0 credits	8 codewords	Remove



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AM.Net Integration



Participate at cpa.cnf.io

Session Creation Automation



VSCPA
Virginia Society of CPAs

Add Events from AM.Net

Go Back

Event Code

Year

Type of Event

☐ Seminar (single-session)

☐ In-House Event (single-session)

☐ Conference (multi-session)

Business Valuation, Fraud & Litigation Services Conference	11 sessions synced
Sep 19-20, 2019 4-142 / 20	Pull From AM.Net Last Pulled: Aug 6, 9:53am
Settings / Remove	



Participate at cpa.cnf.io

Sync Registered Attendees

Business Valuation, Fraud & Litigation Services Conference

Sep 19-20, 2019

4-142 / 20

[Settings](#) / [Remove](#)

11 sessions synced

[Pull From AM.Net](#)

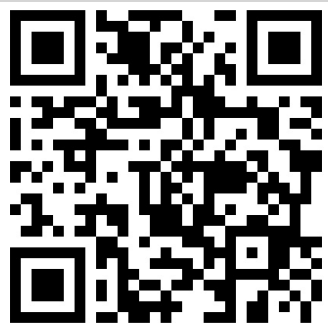
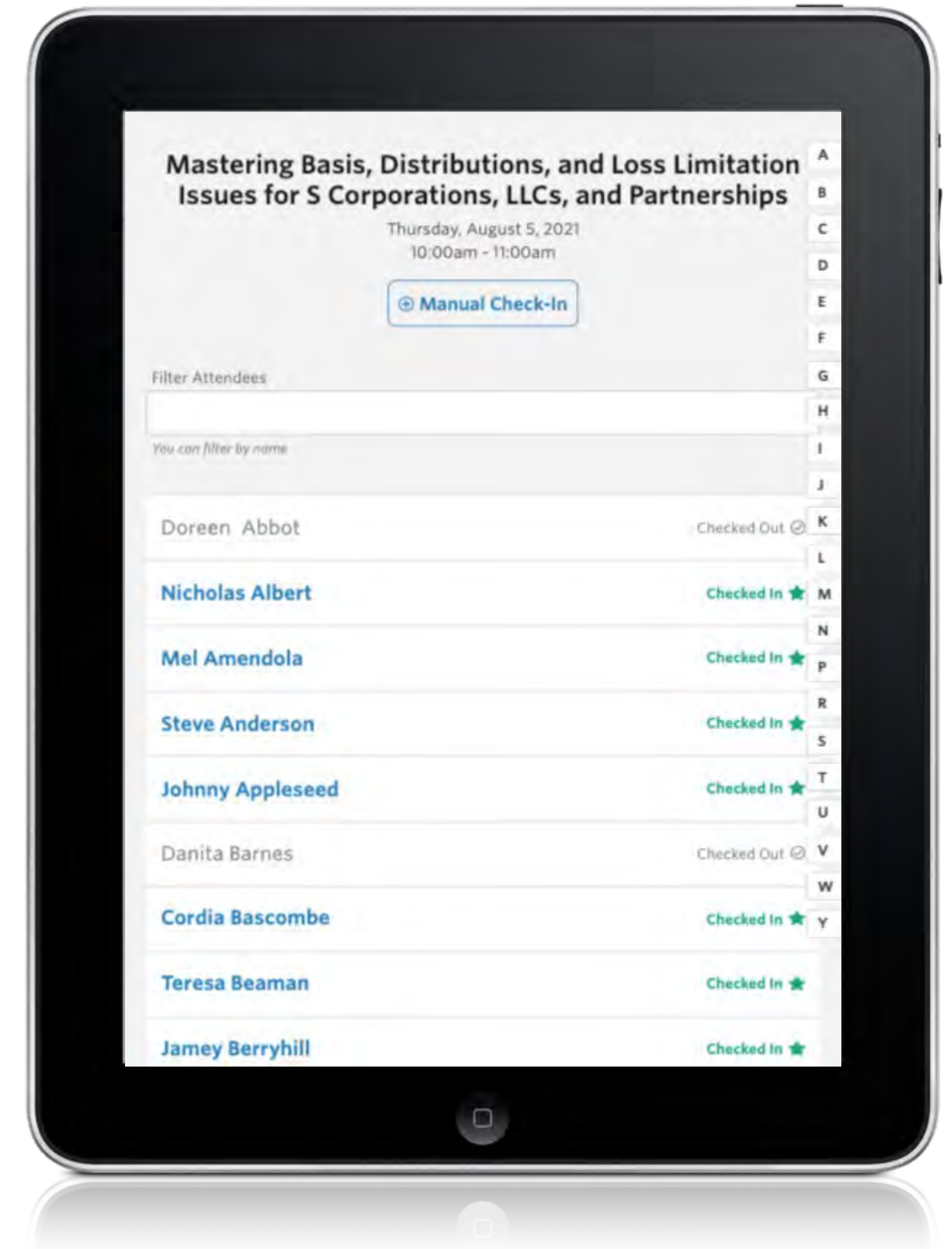
Last Pulled: Aug 6, 9:53am

Not Yet Pulled

[Pull From AM.Net](#)

Kiosk Pre-Loading

[Pull From AM.Net](#)



Participate at cpa.cnf.io

One Click Attendance Data Sync

Push Attendance: Business Valuation, Fraud & Litigation Services Conference

[Go Back](#)

Push Check-Ins to AM.Net

Debug: Show Report

FIRST NAME	LAST NAME	EMAIL	ALIGNED	REGISTERED	CHECK-INS	CHANGES	REMOVE
Anthony	Aiken	aaiken@aikencopc.com			0	No Show (RegStatus will be marked as 'Other')	

Business Valuation, Fraud & Litigation Services Conference

Sep 19-20, 2019
4-142 / 20

[Settings](#) / [Remove](#)

11 sessions synced

[Pull From AM.Net](#)

Last Pulled: Aug 6, 9:53am

Not Yet Pulled

[Pull From AM.Net](#)

Kiosk Pre-Loading

[Pull From AM.Net](#)

Align users

[Align Users](#)

Sync to AM.Net

[Push Data Now](#)

Last Pushed:

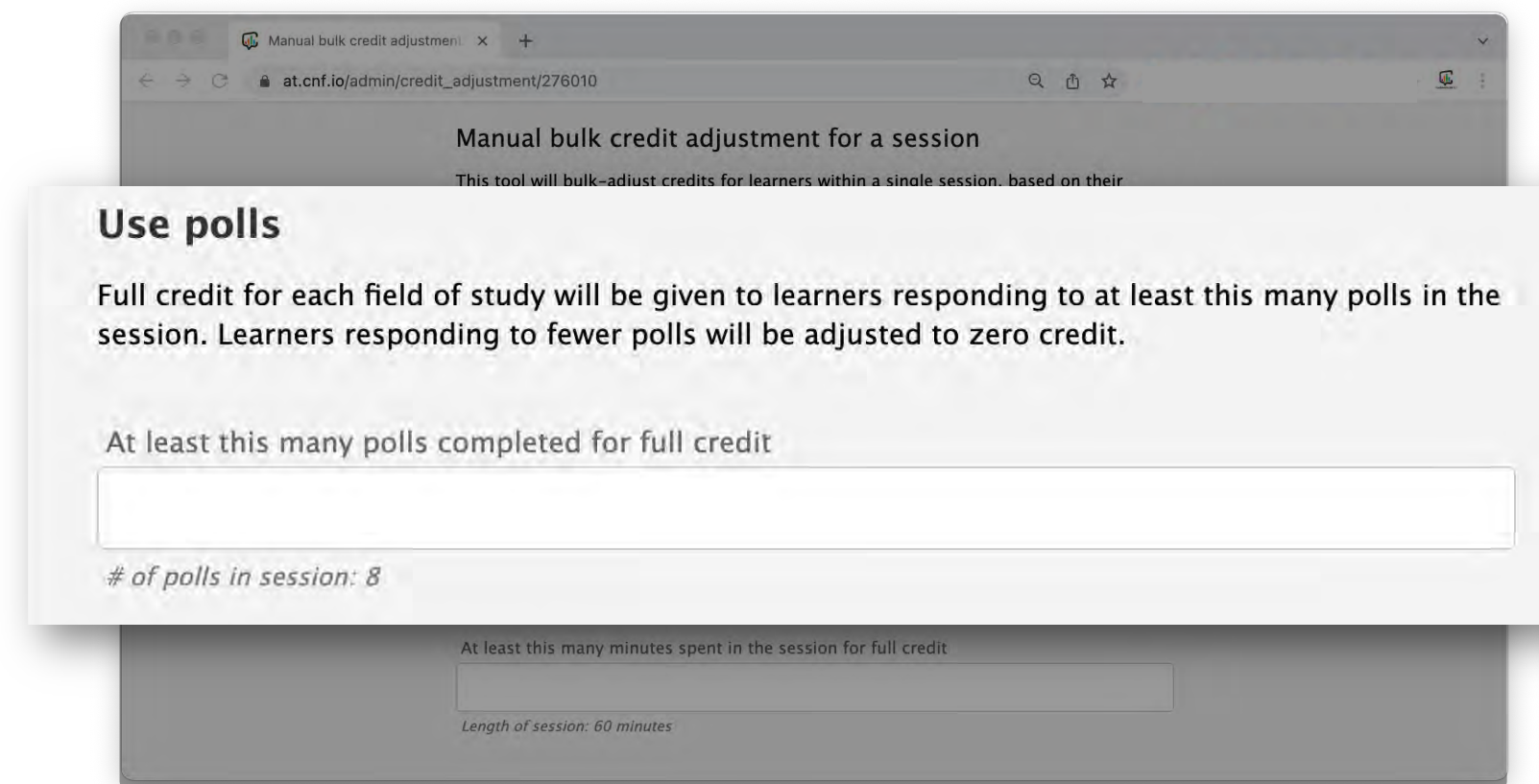


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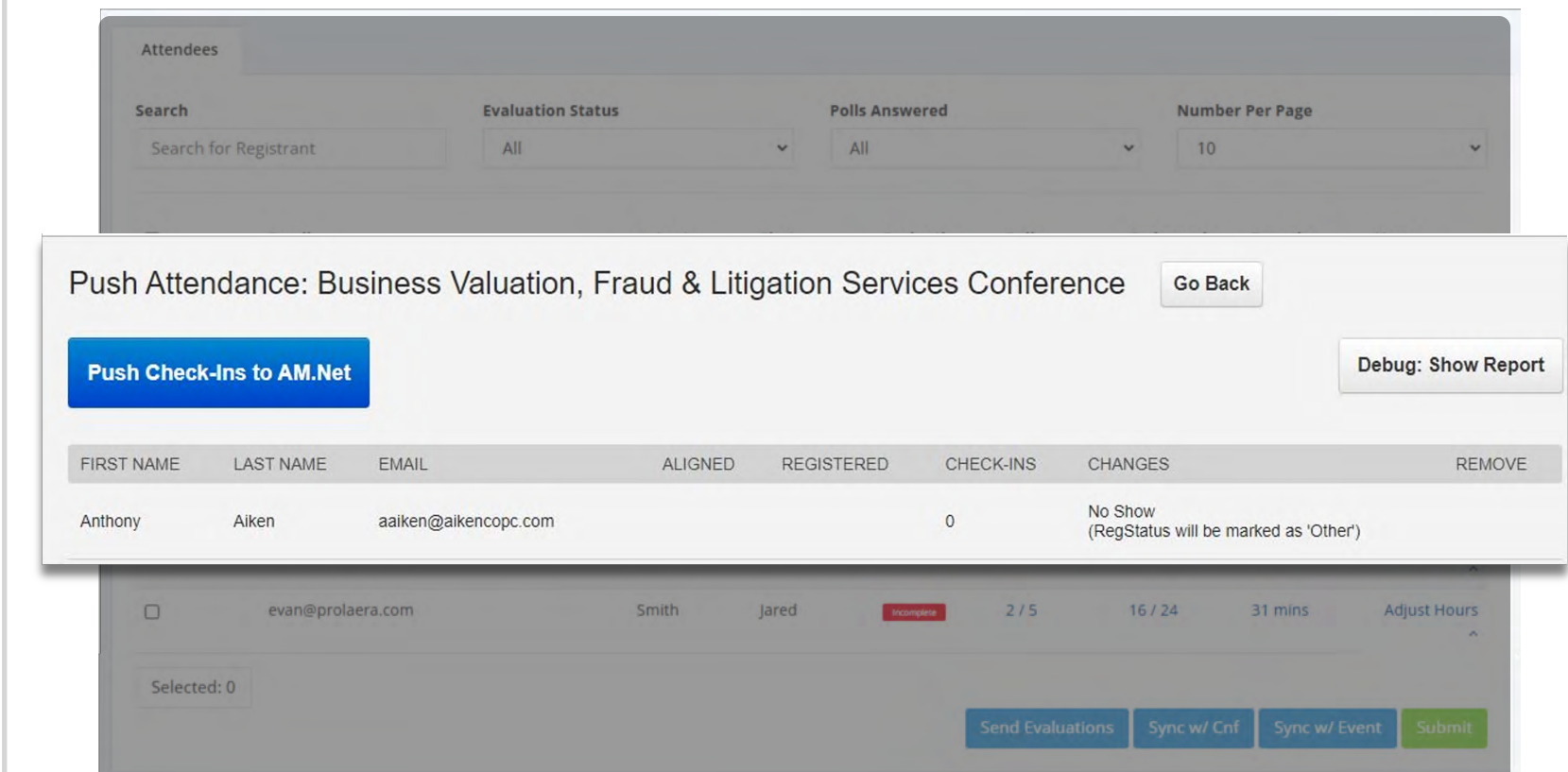
Reconcile Attendance For Any Event in Three Steps...



1 Capture Attendance



2 Run Credit Adjustment



3 Sync Back to AM.Net



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VSCPA Case Study



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VSCPA Program Types



In House



Seminars



Conferences



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In-House Programs



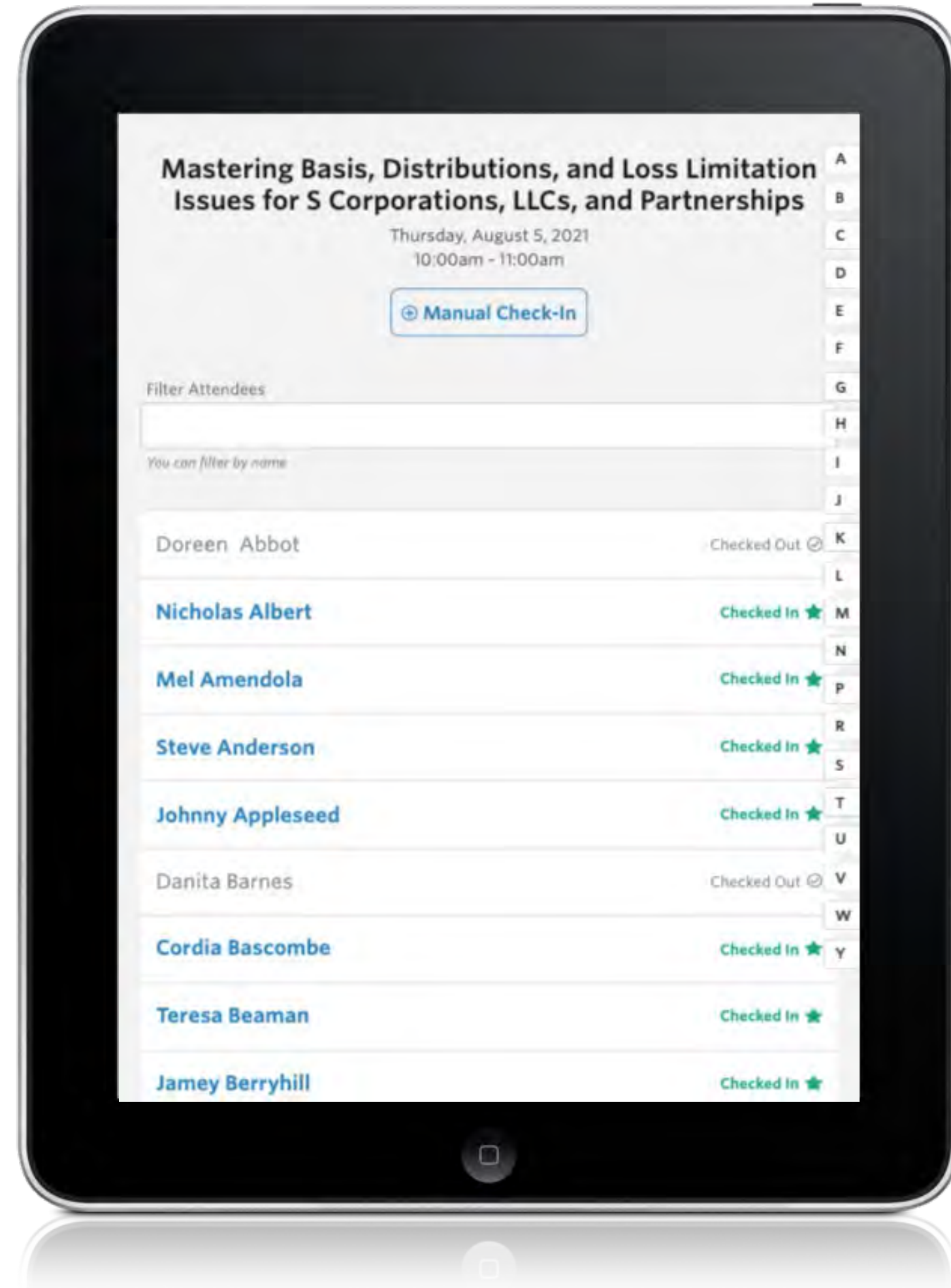
Previous Process

- Paper Sign-in Sheets
- Manual Attendee Registration
- CPE Certificates Took Up to a Week
- Time Consuming



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In-House Programs



New Process

- ▶ Electronic Check-in
- ▶ Real-time Reporting
- ▶ Same Day CPE Certificates
- ▶ Time Savings



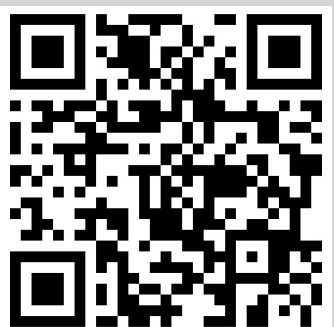
Participate at cpa.cnf.io

Seminars



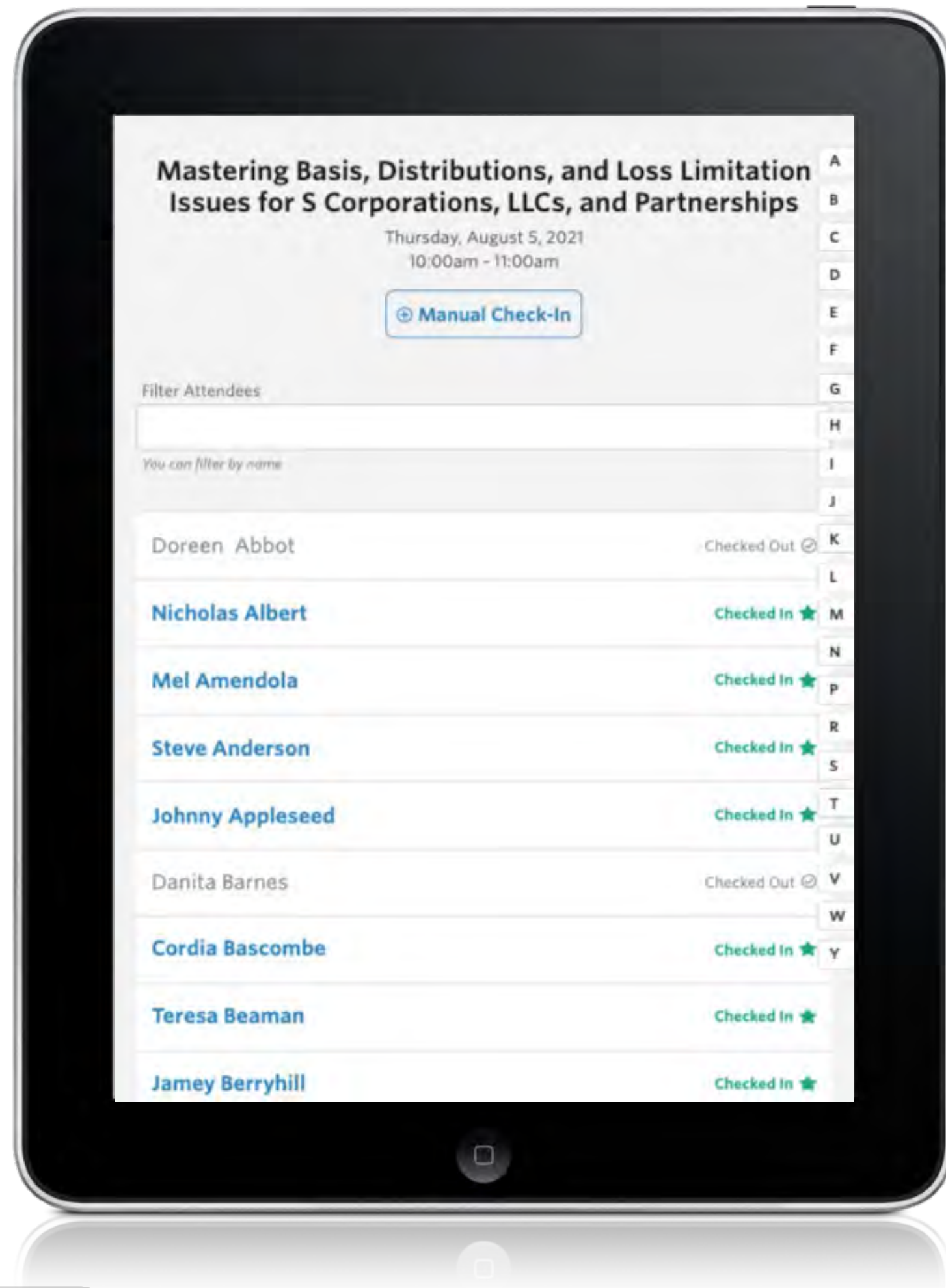
Previous Process

- Paper or Electronic Sign-in Sheets
- Manual Attendee Reconciliation
- CPE Certificates Took Up to 3 Days
- Time Consuming



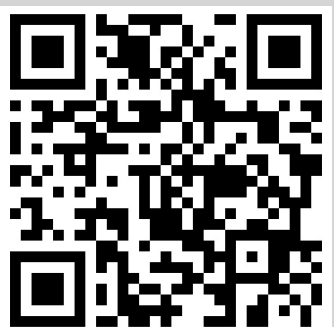
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Seminars



New Process

- ▶ Electronic Check-ins
- ▶ Automatic Attendance Reconciliation
- ▶ Same Day CPE Certificates
- ▶ Time Savings



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Conferences

CPE FORM

If you plan to claim credits, download and complete this form with your accreditation information. As each accrediting organization is different, please contact accrediting organizations directly for more detailed information on self-reporting credits. Please note, FS-ISAC does not maintain records of earned CPE credits. It is the responsibility of the attendee to maintain his or her own records.

Name _____

Company _____

Signature _____ Date _____

Check Sessions Attended Possible Credits Earned per Timeslot

MONDAY 21 MAY

<input type="checkbox"/> Member Only Workshop NCSA Workshop: Cybersecure My Business*	3.0
<input type="checkbox"/> Member Only Threat Intel and Incident Response: We Are Not a Helpdesk, Stop Treating Us Like One*	0.5
<input type="checkbox"/> Member Only Securing a City's Digital Future: NYC Cyber Command*	
<input type="checkbox"/> Member Only Workshop The Cyber Defense Matrix Reloaded*	
<input type="checkbox"/> FS-ISAC 101 and Meet BBM*	2.0
<input type="checkbox"/> Member Only Workshop CSIRP: What It Is, What It Can Do and How to Use It*	
<input type="checkbox"/> Member Only Strength in Numbers: Sharing Information Across Intel Silos*	0.5
<input type="checkbox"/> Member Only Build your A-Team: Recruiting, Developing, and Retaining with the NICE Framework*	
<input type="checkbox"/> Keynote Fast, Forward and Focused	0.5
<input type="checkbox"/> Innovation Challenge: Tame the Titans	1.0
<input type="checkbox"/> Data Loss Prevention in Day to Day Business	
<input type="checkbox"/> From Unknown to Known: Using Real-Time Forensics to find Overlooked Malicious Activity	
<input type="checkbox"/> The Real World of Threat Hunting: Tools, Tips, and Recipes	0.5
<input type="checkbox"/> The TICSI are Talking	
<input type="checkbox"/> Mergers and Acquisitions Assessments	
<input type="checkbox"/> Detecting Fraudulent Activity Using Common Tools And Techniques	
<input type="checkbox"/> The Underdark: Carding and OpSec	
<input type="checkbox"/> DevOps to Take Vulnerability Management to the Next Level	
<input type="checkbox"/> Rebooting Threat Intelligence Sharing and Object Analysis Transparency	0.5
<input type="checkbox"/> The Threat Grid: How To Prioritize Threats	
<input type="checkbox"/> The Evolving Boardroom: Integrating Intelligence Community Perspectives	

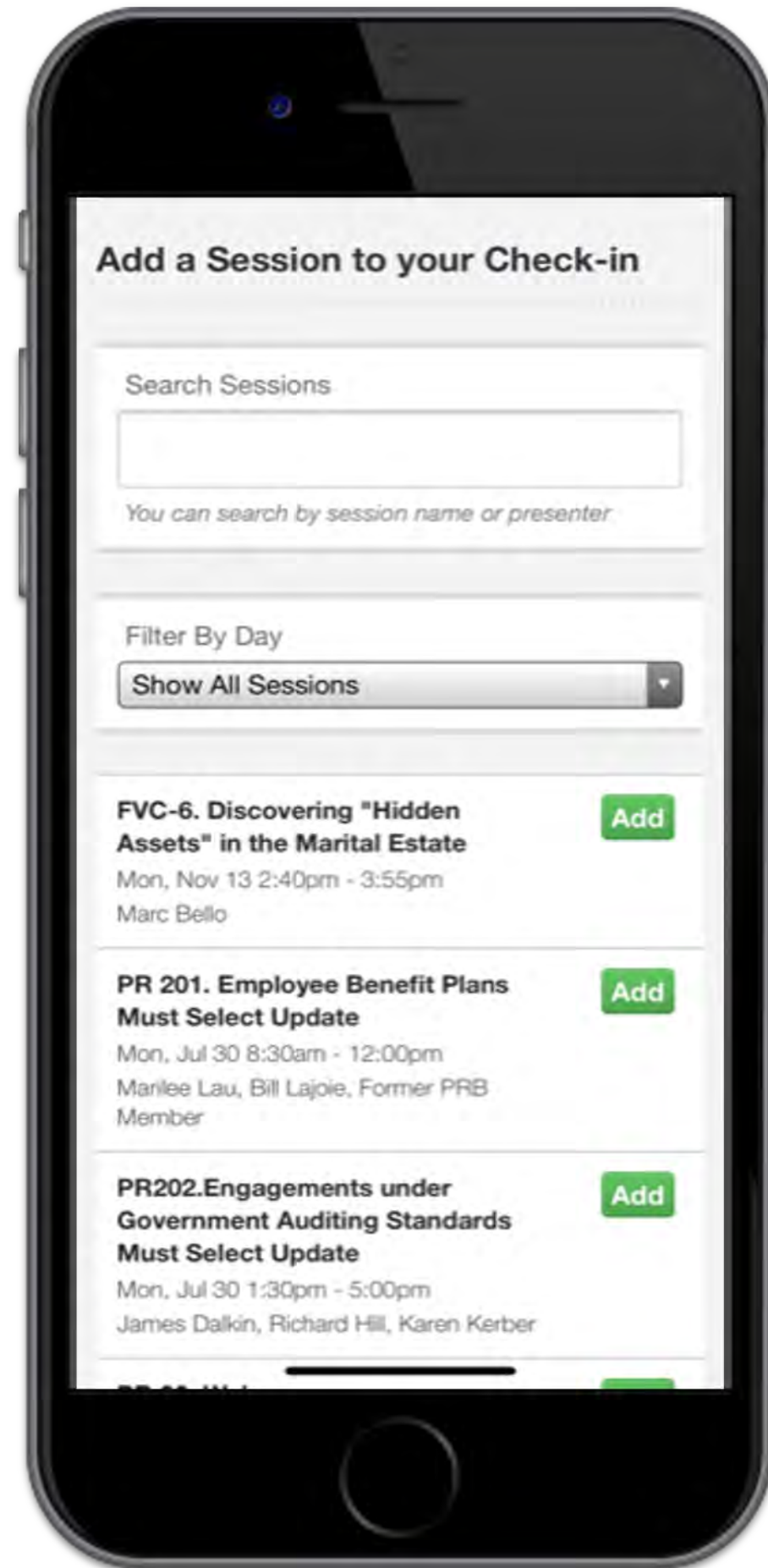
Previous Process

- ▶ Paper Attendance Forms or SurveyMonkey
- ▶ Manual Session Attendance & Reconciliation
- ▶ CPE Certificates Took 2+ Weeks
- ▶ **Extremely** Time Consuming



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Conferences



New Process

- Self-Reporting or Real-time Code Based Attendance Tracking
- Quick Session and Attendee Import Process
- One Click Attendance Data Sync Back to AM.Net
- CPE Certificates Take 2 Days
- Time & Recourse Savings Are **UNBELIEVABLE**



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Major Benefits

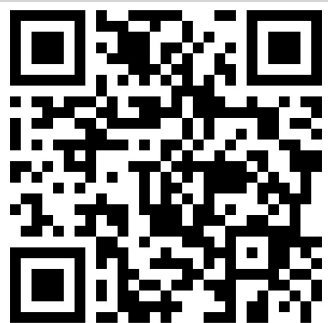
- Time Savings
- Member Satisfaction
- Increased Accountability & Compliance
- Learner Engagement



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Time Savings

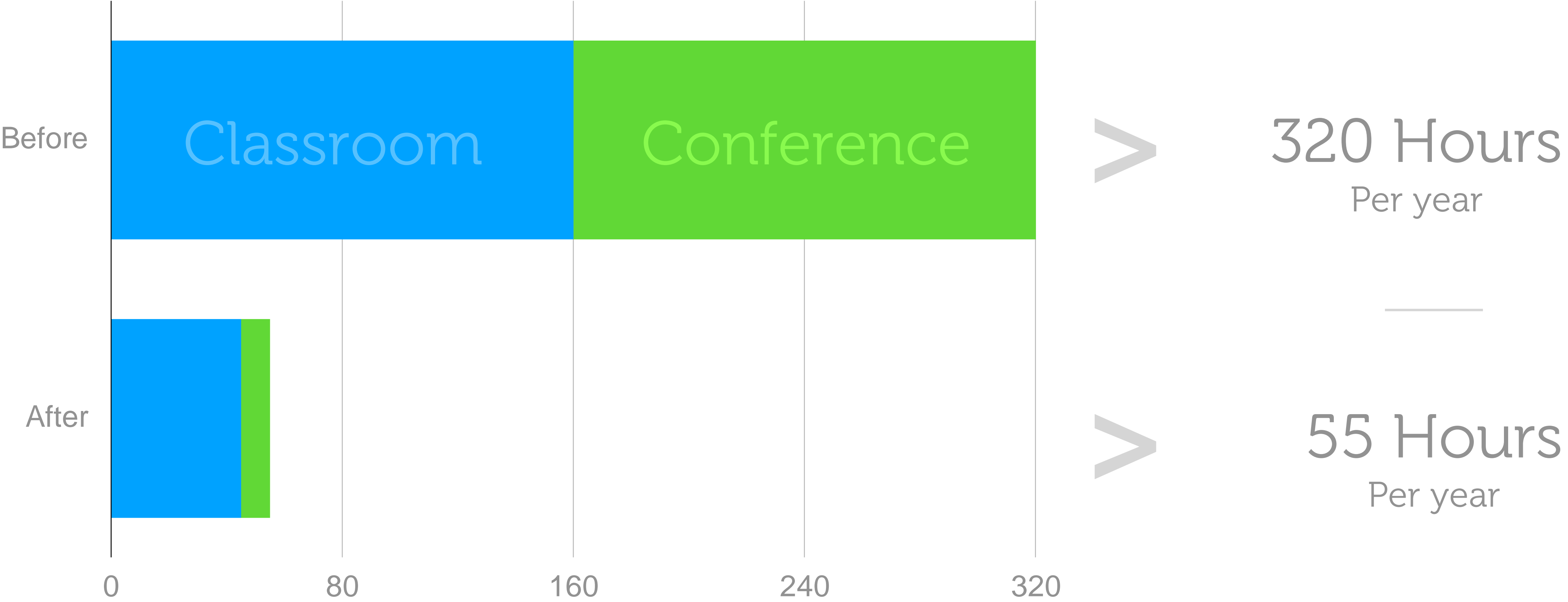
Program Type	# Programs Per Year	Time Spent Before (Per Event)	Time Spent After (Per Event)	Time Reduction
In-House	100	1+ Hour	15 Minutes	75%
Seminars	120	30 Minutes	10 Minutes	50%
Conferences	10	2-3 Full Days	30-60 Minutes	90%



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Time Savings

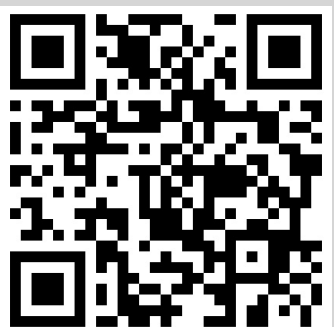
VSCPA Hours Spent Reconciling CPE Attendance



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Member Feedback

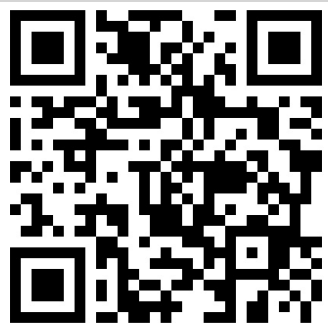
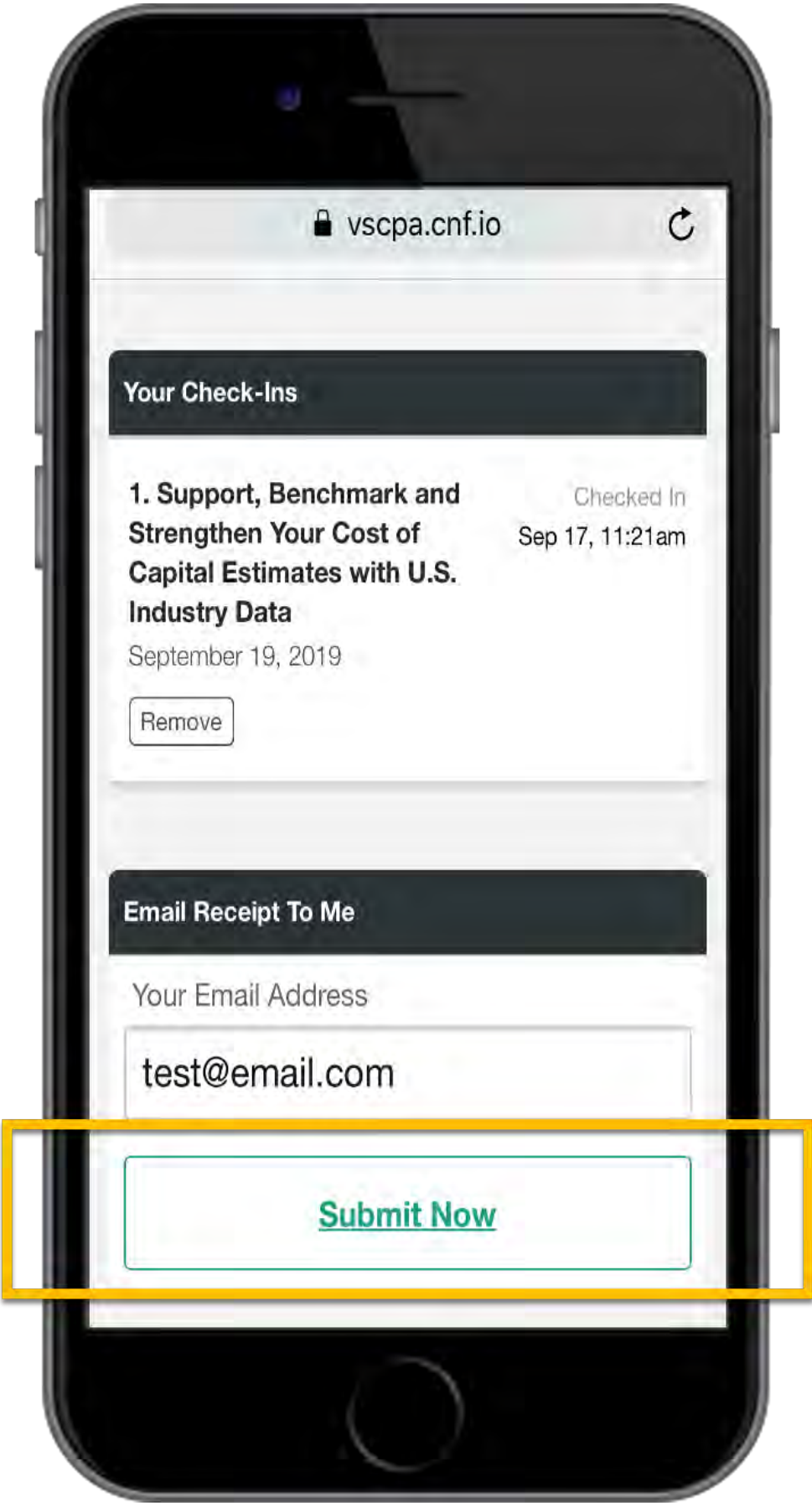
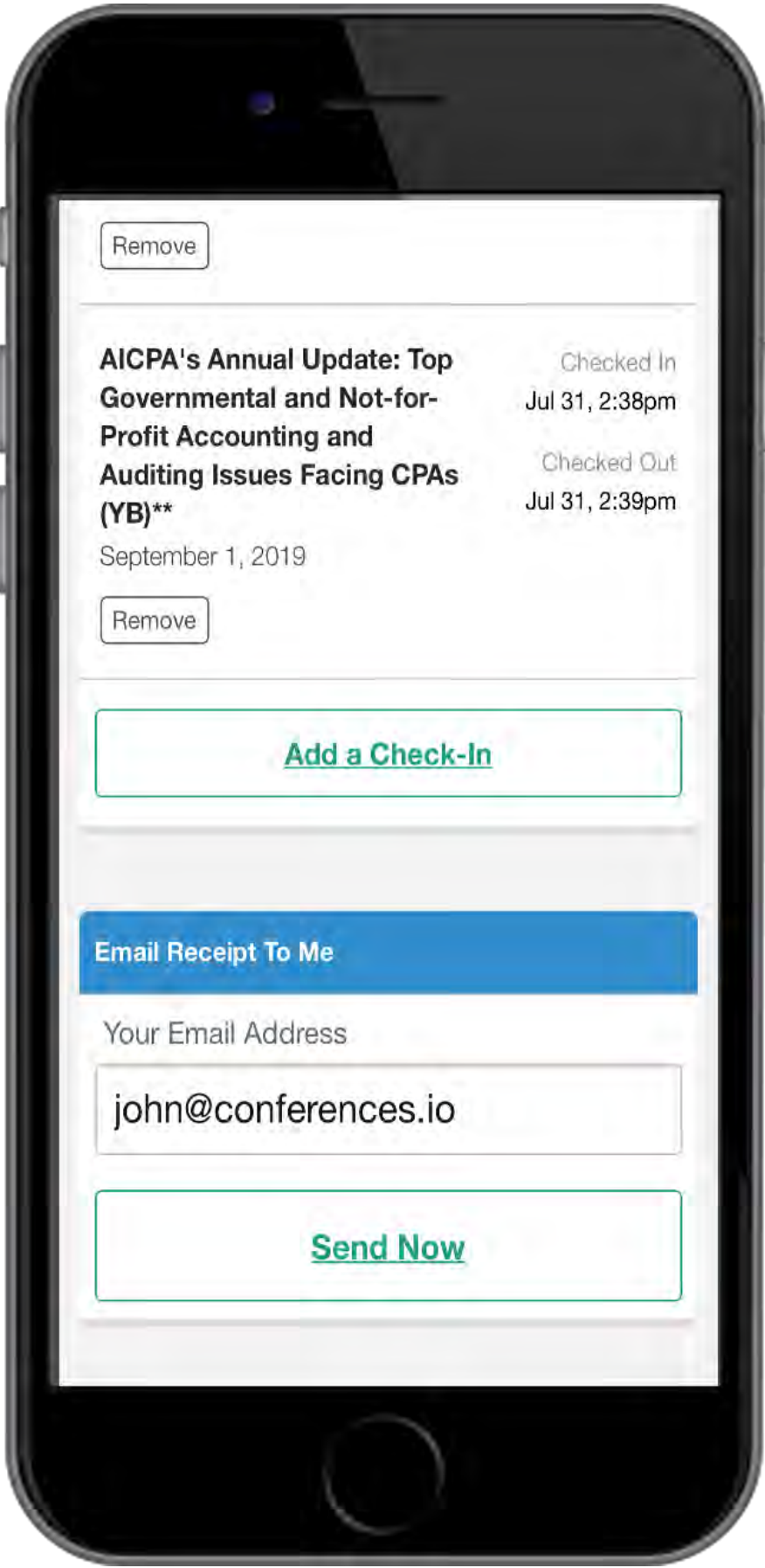
- Very Positive Feedback From Members after Implementation
- General Positive Perception of Going Digital
- Initially Some Hesitation in Terms of "Was My Attendance Recorded?"



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Member Feedback

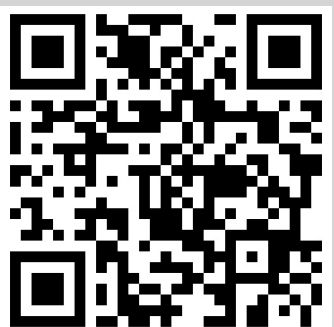
Changed Email Receipt Button label From "Send Now" to "Submit" For Psychological Perception



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Increased Accountability & Compliance

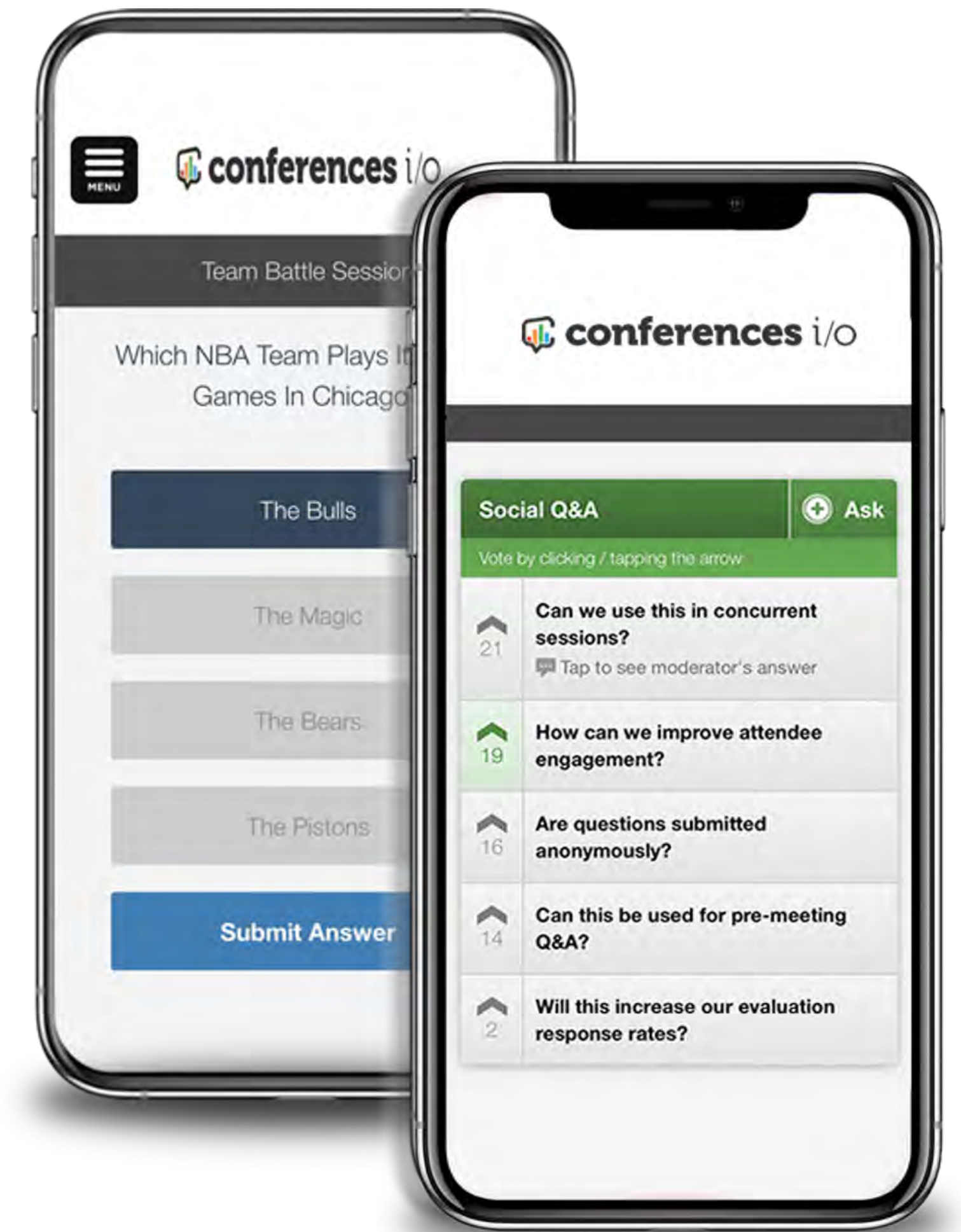
- Fewer Attendees Trying to Sneak Out Early
- Accuracy of Timestamps, etc.
- Electronic Record Keeping (Not Saving Paper Forms)
- NASBA Compliance



Participate at cpa.cnf.io

Learner Engagement

- ▶ Integrated In Our Event App
- ▶ Q&A For Each Session
- ▶ Helps Engage Online Attendees
- ▶ Members Can Ask Anonymously
- ▶ Instructors Tend to Cover More Questions
- ▶ Polls Are Easy to Set Up & Well Received By Attendees



Participate at cpa.cnf.io

Q&A



Breakout 4A. The Balancing Act Between Learning & Membership

Does this sound familiar: “Our association offers valuable, members-only benefits including advocacy, a journal or magazine, discounts on publications and education, resources to keep you up to date, leadership opportunities, networking, and career assistance.”? Are you feeling the pressure to offer more free resources to attract or retain customers? Associations are under pressure to provide tangible value, yet many lack a coherent and comprehensive program/service value strategy. In this session we will consider the balancing act and interconnectedness between the various value-centers of typical associations and identify ways to increase revenue, reach and impact and the activities you can engage in to evaluate your suite of programs, services, and positioning.

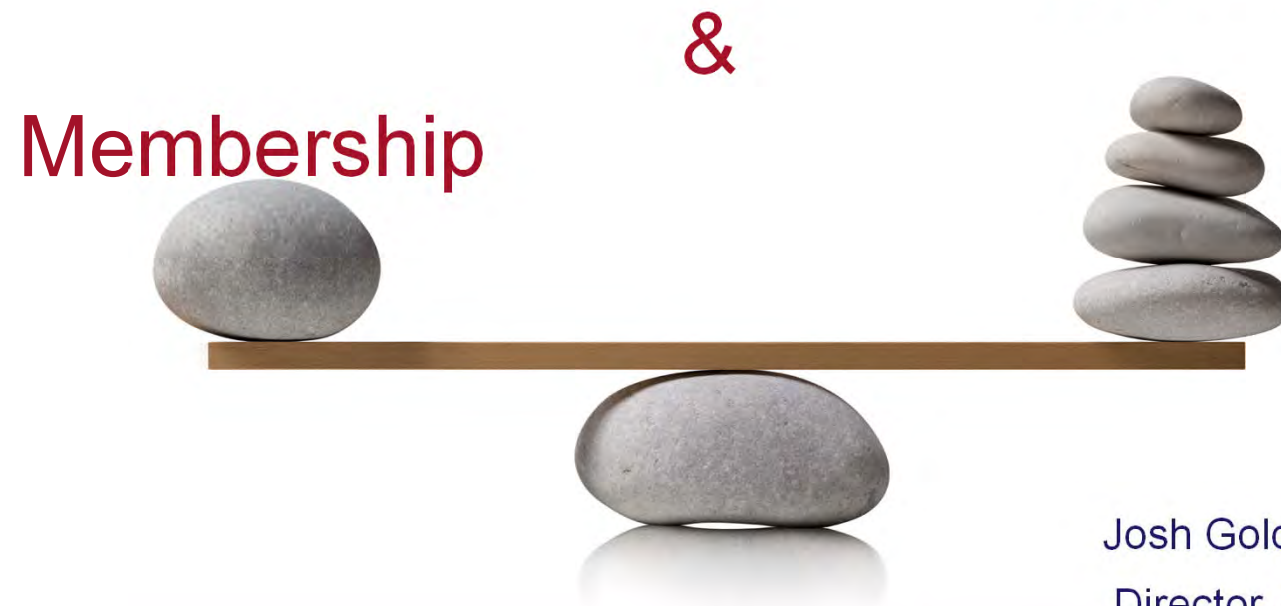
Josh Goldman, CAE

Tagoras

Josh Goldman, CAE, director of consulting services at Tagoras, is a learning business professional with over 20 years of experience in maximizing the value associations and other organizations provide to their markets. He has deep expertise in helping learning businesses address their stakeholders’ competency, credentialing, and workforce disruption needs. Josh has held senior leadership positions in local, state, regional, national, and international membership associations and nonprofits with oversight of portfolios including program development, membership, partner/business development, employer services, education, competency, credentialing, standards development, and global market entry.

He has gained national attention for thought leadership on association learning, shifting from compliance to competence, microlearning, and business models focused on employer value. Josh has authored book chapters on developing a professional’s body of knowledge and on enhancing individual professional development planning. He has served ASAE on the professional development council, and the ASAE Foundation on its workforce development task force and the development committee. His work has been recognized in the following trade publications: 2018 TRENDS Most Innovative (Vested Learning), 2016 ASAE Power of A Silver Award (Microlearning initiative), 2015 TRENDS Bronze Award (Quick Bytes product), and the #6 most read story in Accounting Today (Learning How to Learn). He has been selected by the U.S. Chamber of Commerce to attend the Talent Pipeline Management Academy.

The Balancing Act Between Learning



Josh Goldman, MA CAE, CTA
Director, Consulting Services

Why are you here?

- What are you wrestling with – whether a challenge or an opportunity – that relates to the topic of this session?
- How are you hoping the session might help?
- What's the learning team's goals?
- What's the membership team's goals?



Today

- Current Context
- Business Model Considerations
- Markets, Customers, & Channels
- Products & Lifecycles
- Understanding the Customer

It's all.....



Product



Price



Place



Promotion

My bias.....

- Associations should have an owner overseeing enterprise-wide product development, packaging, and management (CPO, CRO, CVO, CMO, CXO),
- or, a well managed process for value centers to make those collaborative decisions

But first, nomenclature

- Learning businesses: market facing entities that serve the global market for adult lifelong learning, continuing education, and professional development.
- Subscription model: a customer pays a recurring price to access a product or a service for a certain period of time. (Netflix)
- Membership model: a customer gains access so they can obtain discounts on products or services. (Costco)
- Memberscription model: What we are. 😊

Diagnosis

- What has changed significantly about the market in which we operate?
- Who are the customers we intend to serve (segments)?
- What are the outcomes each segment seeks to achieve?
- What are our desired outcomes for each segment?
- What are the most compelling opportunities for reaching these learners and achieving the target outcomes?
- What are the obstacles that could interfere or prevent us from realizing this opportunity?
- What advantage do we have in overcoming the obstacles?



BUSINESS MODEL CONSIDERATIONS

Strategy

Business Model

Captured
Value

Business Model Components

Value Proposition

- Specific buyer segment
- Outcome-focused
- What and *how*

Resources

- People
- Technology
- Brand, etc.

Profit Formula

- Revenue ($P \times V$)
- Costs (Direct/Indirect)
- Margins and *Velocity*

Processes

- Design & Development
- Sales & Marketing
- Training, etc.

Adapted from *Seizing the White Space* by Mark Johnson

Value Proposition

- Important job-to-be-done, not supported well currently
- Offering that is better than the alternatives, at lowest appropriate price



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Categories

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What do you want to learn?



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- Profit Formula
- Resources
- Processes



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Find the right instructor for you



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Learn on your schedule

Business Model Analogies

CAN'T THINK OF A NEW BUSINESS MODEL? Try adapting one of these basic forms.

ANALOGY	HOW IT WORKS	EXAMPLE
Affinity club	Pay royalties to some large organization for the right to sell your product exclusively to their customers.	• MBNA
Brokerage	Bring together buyers and sellers, charging a fee per transaction to one or another party.	• Century 21 • Orbitz
Bundling	Package related goods and services together.	• Fast-food value meals • iPod/iTunes
Cell phone	Charge different rates for discrete levels of a service.	• Sprint • Better Place
Crowdsourcing	Get a large group of people to contribute content for free in exchange for access to other people's content.	• Wikipedia • YouTube
Disintermediation	Sell direct, sidestepping traditional middlemen.	• Dell • WebMD
Fractionalization	Sell partial use of something.	• NetJets • Time-shares
Freemium	Offer basic services for free, charge for premium service.	• LinkedIn
Leasing	Rent, rather than sell, high-margin, high-priced products.	• Cars • MachineryLink

Low-touch	Lower prices by decreasing service.	• Walmart • IKEA
Negative operating cycle	Lower prices by receiving payment before delivering the offering.	• Amazon
Pay as you go	Charge for actual, metered usage.	• Electric companies
Razor/blades	Offer the high-margin razor below cost to increase volume sales of the low-margin razor blades.	• Printers and ink
Reverse razor/blades	Offer the low-margin item below cost to encourage sales of the high-margin companion product.	• Kindle • iPod/iTunes
Reverse auction	Set a ceiling price and have participants bid as the price drops.	• Elance.com
Product to service	Rather than sell a product, sell the service the product performs.	• Zipcar
Standardization	Standardize a previously personalized service to lower costs.	• MinuteClinic
Subscription	Charge a subscription fee to gain access to a service.	• Netflix
User communities	Grant members access to a network, charging both membership fees and advertising.	• Angie's List

From *Seizing the White Space* by Mark Johnson

MARKETS, CUSTOMERS, CHANNELS

New

Products

CC/NP

NC/NP

CC/CP

NC/CP

Current

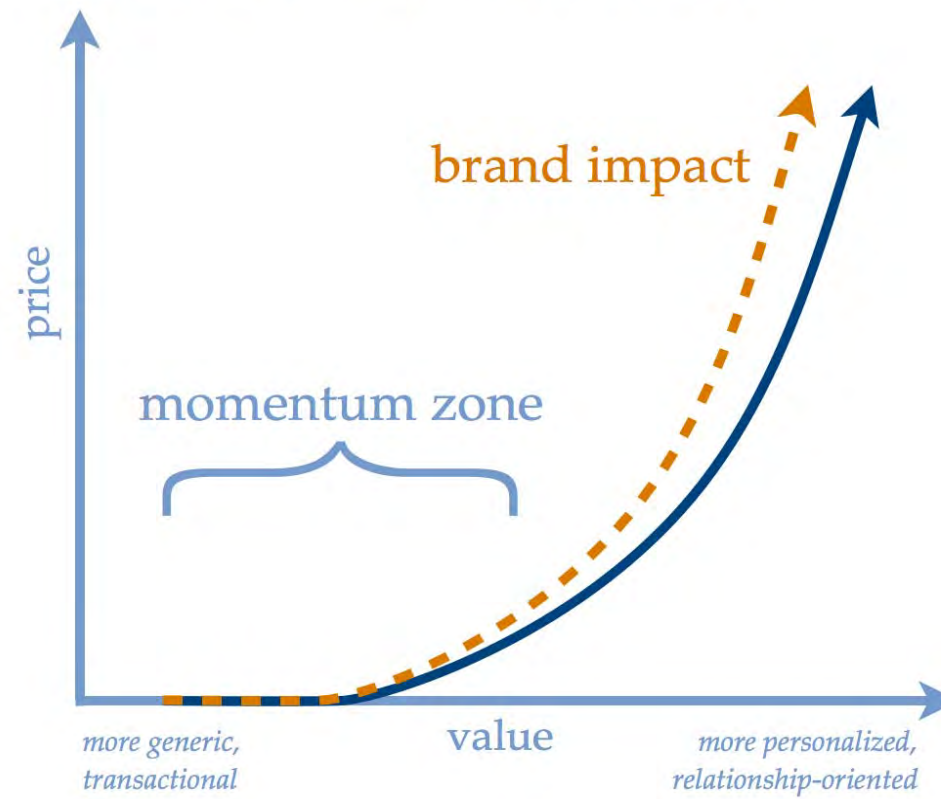
Customers

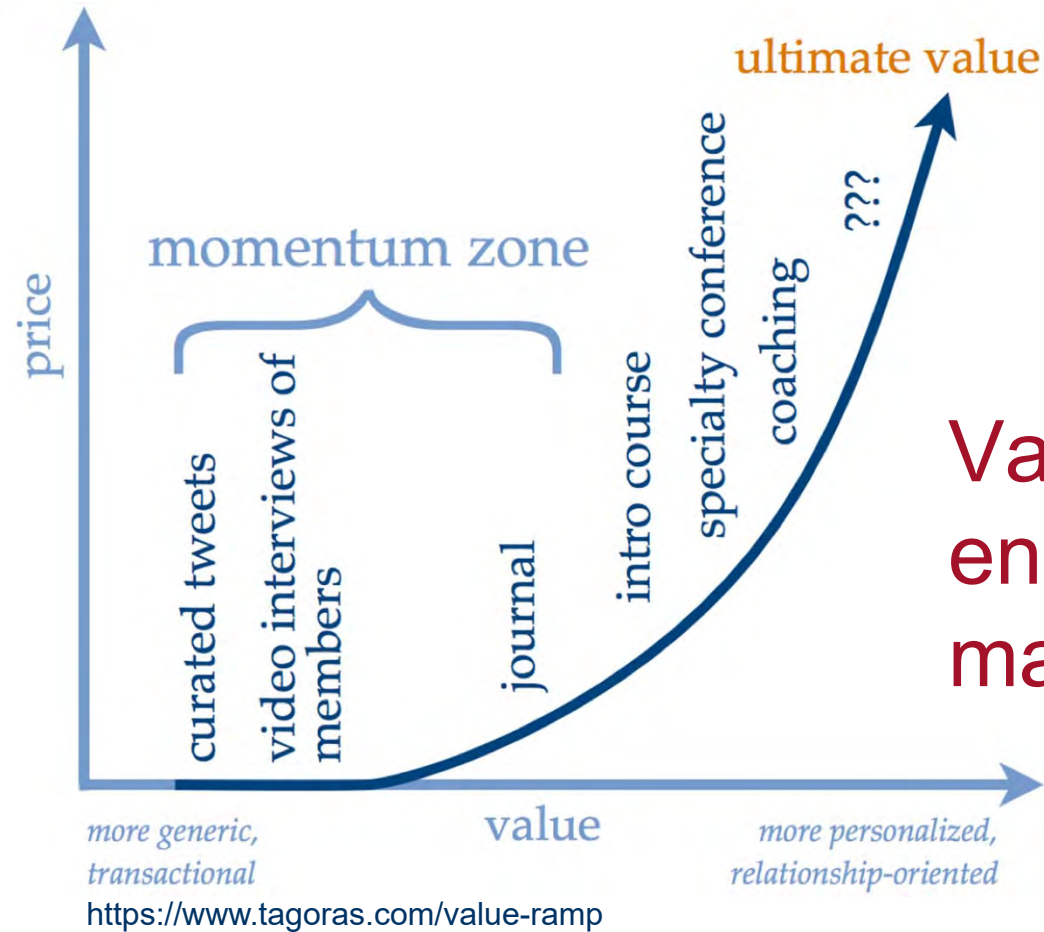
New

PRODUCT & LIFECYCLE

VALUE RAMPTM

Value RampTM

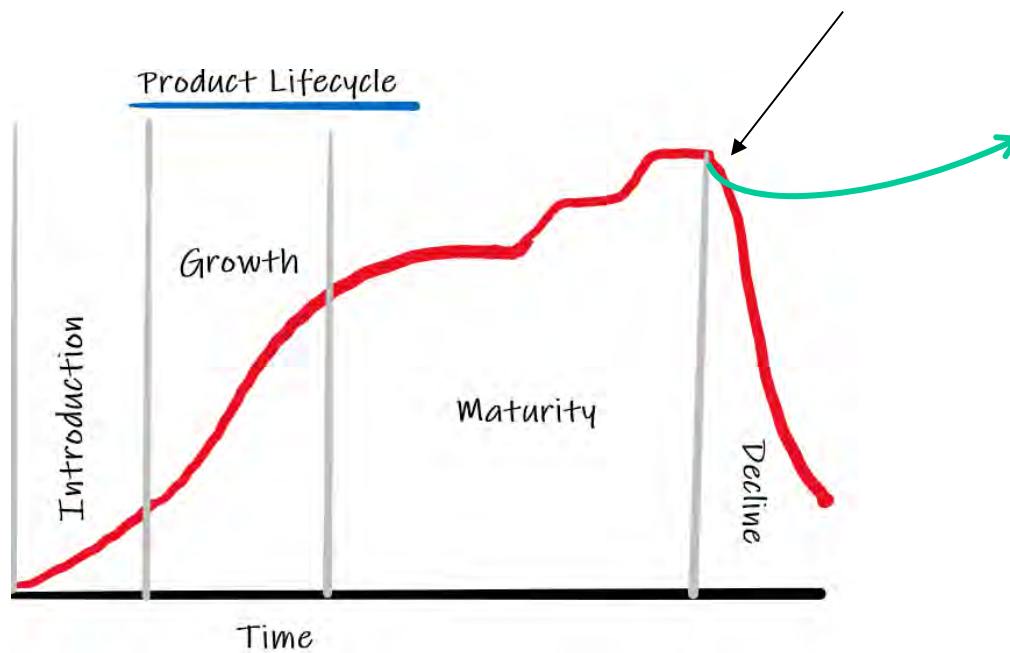




Value is an
enterprise
map!

Extension

Membership & Learning,
You May Be Here



1. Identifying New Markets
2. Adding New Features
3. Re-“Packaging”
4. Abandoning

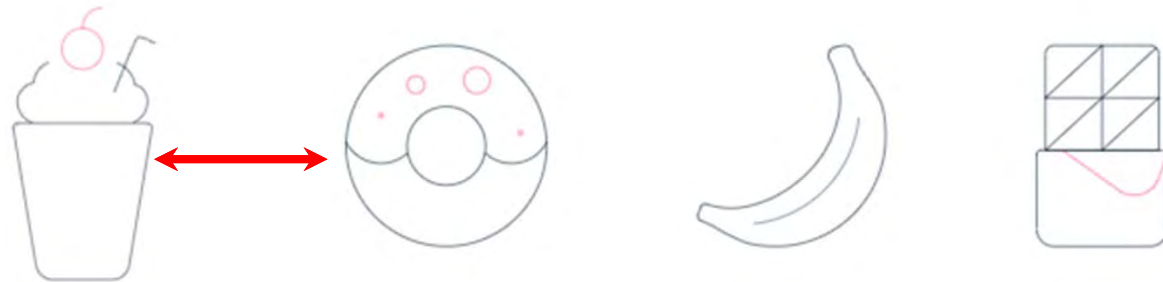
UNDERSTANDING YOUR CUSTOMERS

Jobs To Be Done

- What jobs are your products doing?
- What jobs need doing?
- What needs fired for “you” to get hired?



Jobs To Be Done



Jobs To Be Done



Samuel Hulick Illustration

Valuegraphics- The Why

Based on robust analysis of 500,000+ **VALUEGRAPHICS** surveys in 152 languages, here are the **56 values** that drive all human behavior.

- | | | | | | |
|-----------------------------|------------------------------|--------------------------|---------------------------|-----------------------|-----------------------|
| 1. Family | 11. Basic Needs | 21. Education | 31. Positive Environments | 41. Equality | 51. Peace |
| 2. Relationships | 12. Harmony | 22. Tradition | 32. Happiness | 42. Service to Others | 52. Money |
| 3. Financial Security | 13. Health/Well-Being | 23. Balance | 33. Ambition | 43. Dependability | 53. Unselfishness |
| 4. Belonging | 14. Experiences | 24. Love | 34. Self-Control | 44. Courage | 54. Confidence |
| 5. Community | 15. Respect | 25. Material Possessions | 35. Self-Expression | 45. Cooperation | 55. Freedom of Speech |
| 6. Personal Growth | 16. Compassion | 26. Patience | 36. Environmentalism | 46. Tolerance | 56. Determination |
| 7. Loyalty | 17. Social Standing | 27. Morality | 37. Independence | 47. Leisure | |
| 8. Religion/Spirituality | 18. Creativity & Imagination | 28. Righteousness | 38. Wealth | 48. Influence | |
| 9. Employment Security | 19. Trustworthiness/Honesty | 29. Friendships | 39. Politeness | 49. Intimacy | |
| 10. Personal Responsibility | 20. Security | 30. Authority | 40. Generosity | 50. Political Freedom | |

David Allison of The Valuegraphics Project

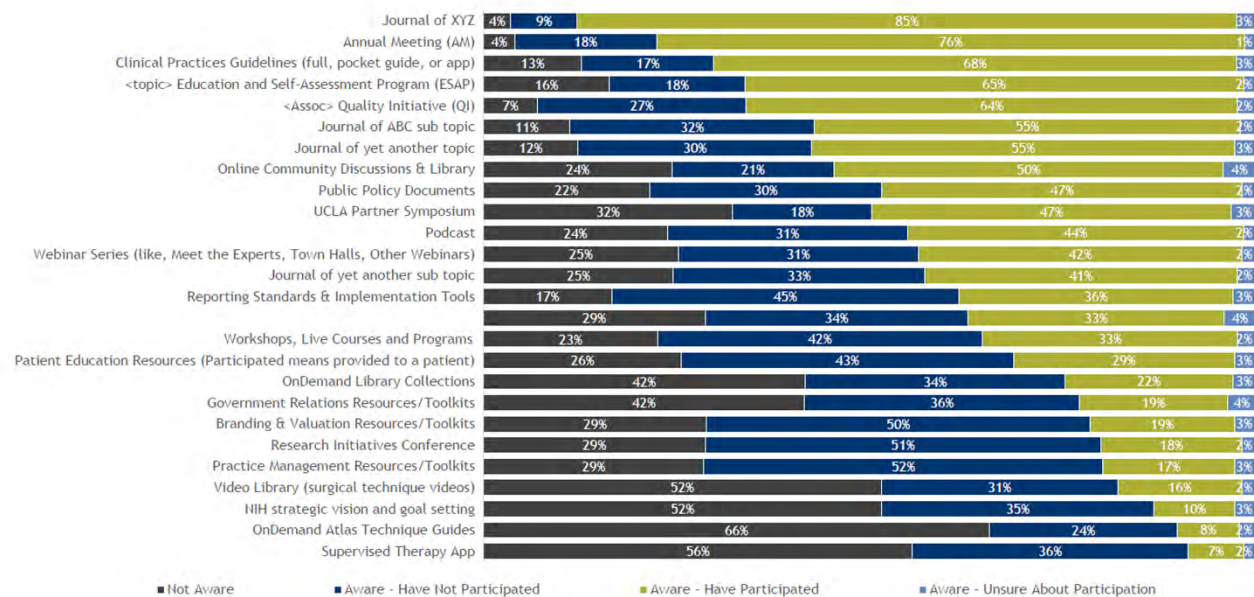
Market Insight MatrixTM

	IDEA GENERATION	IDEA VERIFICATION	IDEA TESTING
TRACKING	<i>Examples: Web site analytics LMS reporting Google Trends</i> <hr/> <hr/> <hr/>	<i>Examples: Web searches Channel searches</i> <hr/> <hr/> <hr/>	<i>Examples: Split testing Offer testing (e.g., AdWords)</i> <hr/> <hr/> <hr/>
LISTENING	<i>Examples: Communities Listserves Evaluations</i> <hr/> <hr/> <hr/>	<i>Examples: Monitoring social networks, blogs, alerts, etc.</i> <hr/> <hr/> <hr/>	<i>Examples: User testing Social reaction Content marketing</i> <hr/> <hr/> <hr/>
ASKING	<i>Examples: Focus groups Brainstorming Interviews</i> <hr/> <hr/> <hr/>	<i>Examples: Surveys Interviews</i> <hr/> <hr/> <hr/>	<i>Examples: Pre-selling Crowdfunding</i> <hr/> <hr/> <hr/>

<https://www.tagoras.com/market-insight>

Benchmarking

TAGORAS
REACH · REVENUE · IMPACT



Prior to this survey, how aware were you of the following program and service options from ABC? Please also indicate whether you have ever participated in/utilized these options. - Base: Total (min n=499)

Alpha Filter ("Gut Check")				Arguments, Clarifications, and Evidence	
Can we lead the market with this product?				Why do we think we can lead the market? If we have not previously led the market with this product, why not? What will change going forward?	
Are we committed to leading the market with this product?				What's the evidence of commitment?	
Alternative/Additional: Does this product fill a critical gap in our value story?					
If "Yes" to both, then >>>					
Beta Filters	Low 0 to 1	Moderate 2 to 3	High 4 to 5	Score	Arguments, Clarifications, and Evidence
Alignment with core strategic focus areas (e.g., orientation, leadership, innovation, communication)	Very weak, if any, alignment with core focus areas	Clear, moderately strong alignment with core focus areas	Very clear, strong alignment with core focus areas		Identify area(s) of alignment.
Strength of Advantage	ORG's capabilities are competitive, but will not likely be perceived as differentiated by the market	ORG's capabilities are distinctive - relatively few providers can match or exceed	ORG is uniquely positioned to do this better than any other provider		Why is it reasonable to think ORG does or does not have an advantage? If needed, how might we validate?
Tangible Benefit	Unlikely to positively impact revenue, enrollments, or other major metrics	Positive impact if appropriately managed	High likelihood of significant positive impact on key metrics		Document the tangible benefits - e.g., projected revenue. In the case of product review, historical revenues should be provided. To the extent that product has not produced positive net revenues, a valid argument needs to be made for why this will could change in the future.
Intangible Benefit	Unlikely to positively impact brand or contribute to future opportunities	Positive impact if appropriately managed	High likelihood of significant positive impact on brand and future opportunities		Explain the intangible benefits.
Tangible Cost	Significant dollar cost with potential for cost overruns	Reasonable dollar cost if appropriately managed	Very low to no dollar cost involved		Document the tangible benefits - e.g., projected expenses. In the case of product review, historical expenses should be provided. To the extent that expenses have been unacceptable, a valid argument needs to be made for why this will could change in the future.
Intangible Cost	Potential for significant opportunity cost and/or distraction not sufficiently addressed	Modest opportunity cost and/or potential for distraction competencies	Very low or no significant opportunity cost or distraction		Explain the intangible costs.
Mission Fit/Moral Imperative	Does not clearly support stated mission of ORG	Contributes in a modest way to the mission of ORG. Seems like the right thing to do.	Strongly supports the mission of both ORG. Clearly the right thing to do.		Explain how this fits ORG's mission.
Total Score				0	
© Tagoras, Inc. May not be reproduced or distributed without written permission from Tagoras, Inc.					
				40 to 55	Proceed
				30 to 39	Evaluate
				0 to 29	Kill
				Can any of the factors be improved enough to move this to "Proceed?"	

Putting it together

Contact Me

Tagoras

Josh Goldman

jgoldman@tagoras.com

800.867.2046

tagoras.com



7. Post COVID Event Planning

Session 4B

As a result of the Omicron variant, various severe weather systems, and the personal comfort/interest of our members and would-be attendees, we're all asking ourselves some version of the million-dollar question: Should we hold, modify, postpone, or cancel our upcoming event? While there's not a one-size-fits-all answer, this session will cover some of the key considerations you and your team should explore before making a final decision. And should you decide that meeting in person is right for your organization, we'll cover key considerations relative to safety protocols and the impact of going hybrid. As always, Aaron will bring lots of resources to support your planning efforts during what promises to be another year of anything but business as usual for the meetings and events industry.

Aaron Wolowiec

Event Garde

Aaron's obsession with learning traces back to preschool, where a knitted purple people eater taught him important life lessons (like cleaning up after yourself). All these years later, Aaron's honed his craft and now designs engaging, multisensory learning experiences for association learners, resulting in the acquisition of new knowledge and skills, the forging of new relationships, and the application of new ideas and perspectives in the workplace. A serial learner and entrepreneur himself (with an alphabet soup of letters trailing his name), Aaron is nationally recognized for his professional development work with boards, learners, staff and volunteers. Having launched four successful brands – Event Garde (coincidentally reprising his early fascination with purple), Healthy by Association, Review My Speaker and FACILIT8me – Aaron's equal parts practitioner and theorist. While the hours are long, Aaron ensures there is no shortage of fun amidst the Slack notifications, email pings and video chats – from the personal connections he shares with each client, partner and colleague to the precious moments of free time spent stalking the latest episodes of his favorite true crime podcasts.

Presentation is
coming. We
will let you
know when it is
posted.

8. Closing Session: DEI & Ethics - What's in it for Business Professionals

This course is intended to create a foundation of diversity, equity and inclusion in the workplace for business professionals and their community. Attendees will begin exploring of the impact of ethics and preconceived bias on in everyday situations at home and at work.

Clare Levison, CPA, CGMA

Inspired Responsibility

Clare Levison, CPA, CGMA, is the owner of Inspired Responsibility, a consulting company dedicated to delivering continuing education via positive messages and meaningful content that inspires change. She strives to help bridge gaps in continuing professional development with inspiring programs and meaningful experiences that deliver the message — as well as the WHY behind the message — to propel professionals from good to best.


In addition to founding Inspired Responsibility, Clare spent more than 20 years in the aerospace and defense industry involved in all aspects of management, project and financial accounting, as well as government compliance. Within her extensive breadth of finance experience, she particularly enjoyed creating competitive proposal volumes, with a focus on producing compelling, compliant content and providing cost analysis and risk mitigation.

Clare is a member of the American Institute of CPAs (AICPA) and the Virginia Society of CPAs (VSCPA) and is licensed in the state of Virginia. She has served on the Board of Directors of the VSCPA and the Board of Directors of the VSCPA Educational Foundation and currently serves as a member of the AICPA Consumer Financial Education Advocates group.

For over a decade, Clare has designed and delivered learning content for CPAs, including Virginia Board of Accountancy-approved ethics courses required to be taken annually by all licensed Virginia CPAs. In addition to her passion for professional ethics, Clare is a fervent financial literacy advocate. She is the author of “Frugal Isn’t Cheap: Spend Less, Save More and Live Better,” and has appeared on major radio and television networks across the country discussing personal finance. She has been a contributor to numerous publications including Family Circle, Fox Business, Glamour, Kiplinger’s, Redbook, The Wall Street Journal, USA Today and U.S. News & World Report.



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COURSE OBJECTIVES

- Explain the importance of diversity, equity and inclusion.
- Summarize the differences between diversity, equity and inclusion.
- Evaluate one's own biases and how they impact decision-making.
- Apply the concepts of diversity, equity and inclusion to everyday dilemmas.
- Develop new perspectives on diversity, equity and inclusion in applying critical thinking.
- Illustrate ways to better promote diversity, equity and inclusion as part of an organization's ethics-based culture.

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THE DIFFERENCES BETWEEN
DIVERSITY, EQUITY AND INCLUSION:

"Being able to pull apart these definitions is vital."
Meg Bolger, Founder of SameTeam

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ESSENTIAL[™]
ETHICS
Powered by the VSCPA

DIVERSITY:

- "The range of human differences..."
Ferris State University's Diversity Office
- "Any way any group of people can differ significantly from another group of people."
Eric Peterson, Diversity and Inclusion educator for SHRM

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EQUITY:

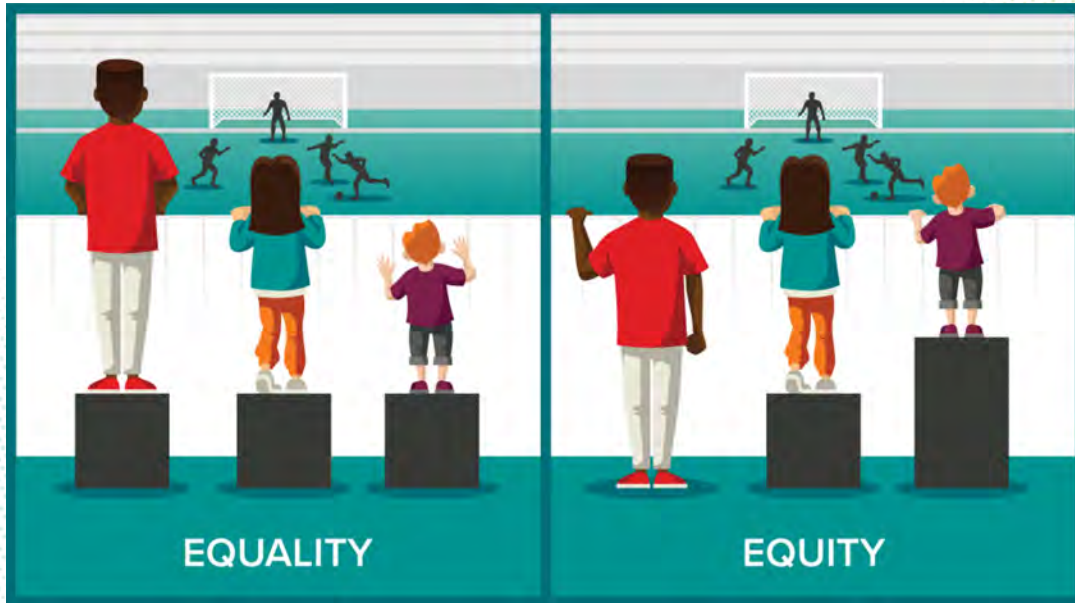
- "Each of us getting what we need to survive or succeed...based on where we are and where we want to go."
Stanford Social Innovation Review
- "Equity recognizes that advantages and barriers exist and that, as a result, we all don't start from the same place."
Meg Bolger

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EQUALITY VS. EQUITY:

Different from equality, which can be defined as treating every individual in the same manner, equity takes into consideration proportionality – not everyone starts in the same place.

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INCLUSION:

- "Inclusion involves an authentic and empowered participation and a true sense of belonging."
Annie E. Casey Foundation
- "Inclusion is about folks with different identities feeling and being valued, leveraged, and welcomed within a given setting."
Meg Bolger

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DIVERSITY VS. INCLUSION:

- "Put simply, diversity is about the what ... Inclusion, on the other hand, is about the how."
AIHR Digital
- "Diversity is being asked to the party. Inclusion is being asked to dance."
Verna Myers, DEI educator

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WHEN DEI INITIATIVES ARE SUCCESSFUL, ORGANIZATIONS BENEFIT BY:

- Being more innovative
- Attracting and retaining a stronger, more resilient and sustainable workforce
- Achieving stronger performance results in the long term

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BUSINESS WITH INCLUSIVE CULTURE:

- 2x likely to meet or exceed financial targets
- 3x likely to be high performing
- 6x likely to be innovative and agile
- 8x likely to achieve better business outcomes

Deloitte

- Increase in employee satisfaction
- Disengagement costs \$450-500B year

Peakon

- 56% increase in job performance
- 50% reduction in staff turnover
- Increased team performance

Forrester

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10 Reasons TO FOCUS ON DIVERSITY, EQUITY, AND INCLUSION



DIRECTLY TACKLE RACISM AND PREJUDICE

Start from a social perspective. By creating an actively inclusive workplace, you'll also create room for productive dialogues in tackling prejudice throughout your workforce.



INCREASE EMPLOYEE SATISFACTION

Feeling their voices are well represented, both as an individual and corporate level, naturally leads to increased job satisfaction for staff. And this is good for business as employee disengagement costs companies up to \$550 billion a year.



GENERATE STRONGER, MORE CONSISTENT EMPLOYEE PERFORMANCE

Diversity, equity and inclusion foster a sense of belonging. A report by Forrester found workplace belonging leads to a 56% increase in job performance, a natural result of employees feeling heard and respected.



DIVERSIFY SKILLS AND CREATIVITY

For businesses to evolve, talent must come from a variety of sources. When different worldviews and skills clash and conjoin, creativity blooms.



GENERATE MORE INNOVATION

Nurturing creativity leads to greater innovation. Teams with diverse backgrounds react and adapt more readily.



CREATE A WIDER, MORE GLOBAL IMPACT

No business is truly local anymore. A diverse workforce more accurately reflects the population served and provides insights into the ways people think.



IMPROVE REPUTATION

Corporate brands are important, and reputations even more so. Have a demonstrably diverse workforce with inclusion baked into company policy, whether B2B or B2C.



GENERATE SUSTAINED FINANCIAL BENEFITS

In a landmark report, Deloitte found businesses with an inclusive culture were twice as likely to meet or exceed their financial targets. Even more substantially, they were eight times as likely to achieve better business outcomes.



REDUCE EMPLOYEE TURNOVER

Staff who don't feel they belong, or they have a voice, won't stay. The aforementioned report by Forrester also found a 50% reduction in staff turnover when workplace belonging was prioritized with inclusive policy. The more employees feel heard, the more likely they'll stay.



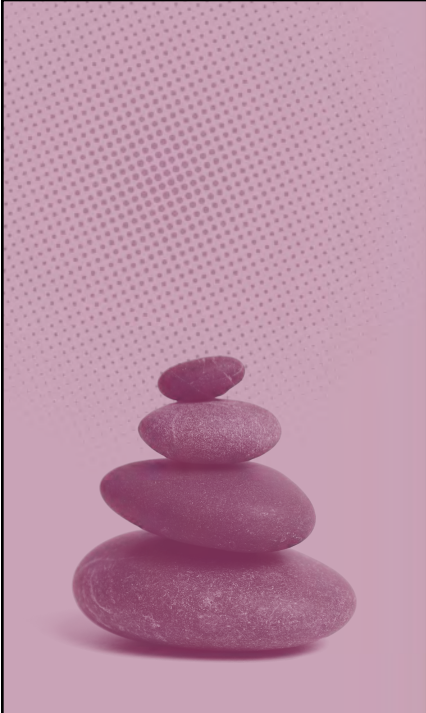
CAST A WIDER TALENT NET

Actively seeking a more diverse workforce taps a wider talent pool. Even better, an active engagement with diversity, equity and inclusion actively opens new positions within businesses. The hiring demand for DEI roles has increased by 106% over the past two years.

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EVALUATE YOUR OWN BIASES AND
THE IMPACT THEY HAVE:

- We all have biases – they can be mitigated, but not eliminated
- Biases are not inherently negative, but often have negative consequences
- "We don't see things as they are. We see them as we are."
Anais Nin

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TYPES OF BIAS

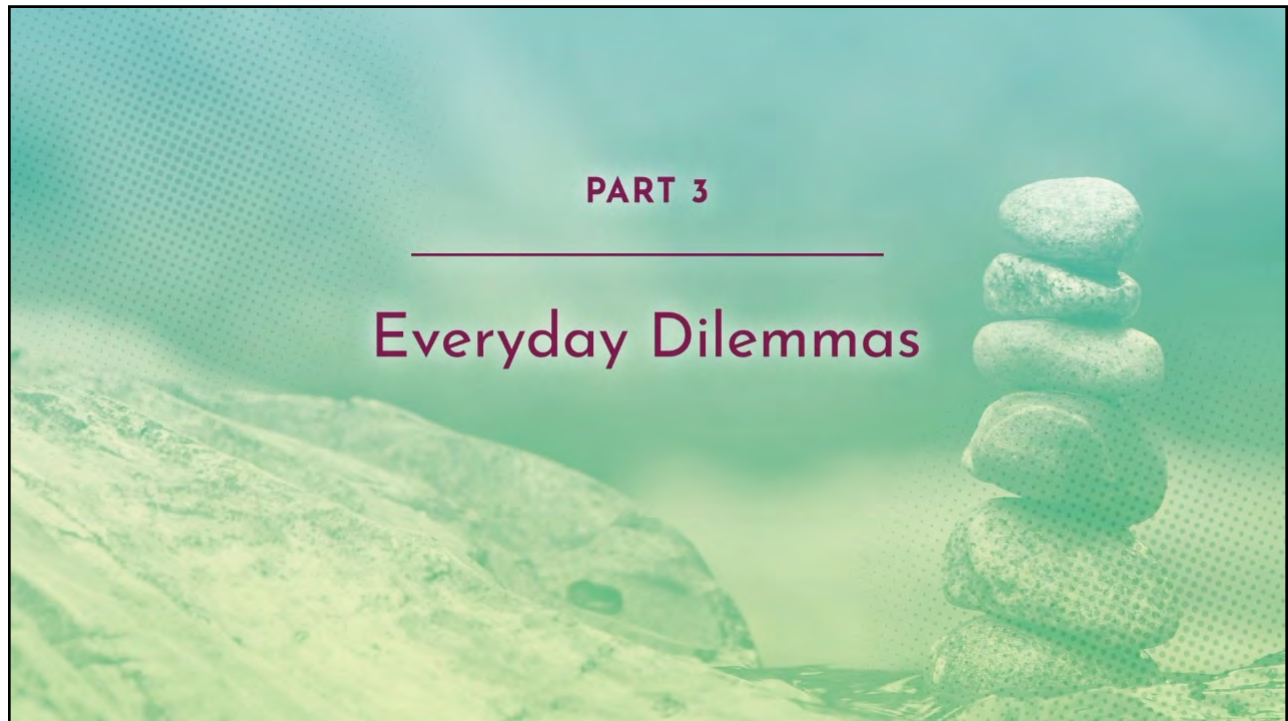


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THE SEEDS™ MODEL:

- Five categories of bias:
 - Similarity
 - Expeditence
 - Experience
 - Distance
 - Safety
- What the bias looks like
- How to mitigate

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DEI AND EVERYDAY DILEMMAS:

- Example 1 – Your team is short-staffed and is looking to hire new staff members.
- Potential for bias
- Applying DEI concepts

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DEI AND EVERYDAY DILEMMAS:

- Example 2 – A new team member recently immigrated to the country and rarely speaks during team meetings.
- Potential for bias
- Applying DEI concepts




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PART 4

Promoting DEI Initiatives



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PROMOTING DEI:

- "People, go to lunch with someone who doesn't look like you or have the same beliefs as you or maybe not the same religion, or someone from the LGBT community. That's the answer.
- Within your firm, within your profession, go to someone else. Ask: 'How can I make you successful in your career? How can I support you in your community?'"

Herschel Frierson, chair of the Board of the National Association of Black Accountants

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INCLUSIVE LEADERSHIP
(CENTER FOR TALENT INNOVATION):

- Ensuring that team members speak up and are heard
- Giving and implementing feedback
- Empowering employees to make decisions
- Taking advice and implementing feedback
- Making it safe to propose novel ideas
- Sharing credit for team success

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DIVERSITY, EQUITY, AND INCLUSION ROADMAP

IT'S TIME FOR
Strategic ACTION!



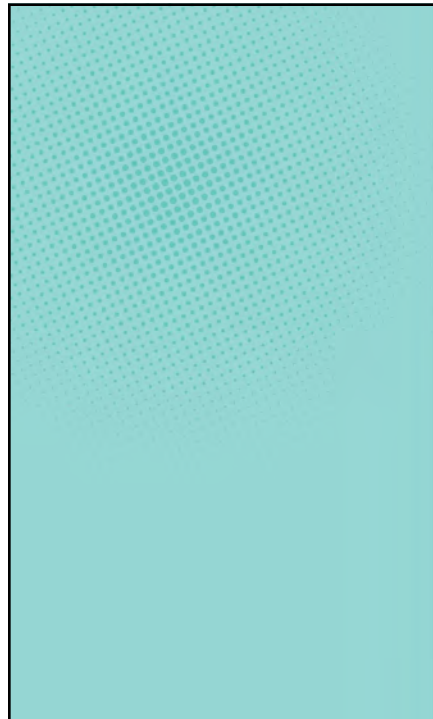
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UNDERTAKING DEI INITIATIVES:

- Don't shy away from the issues
- Actively seek to understand your own biases
- Identify and mitigate bias in processes
- Develop training that is meaningful



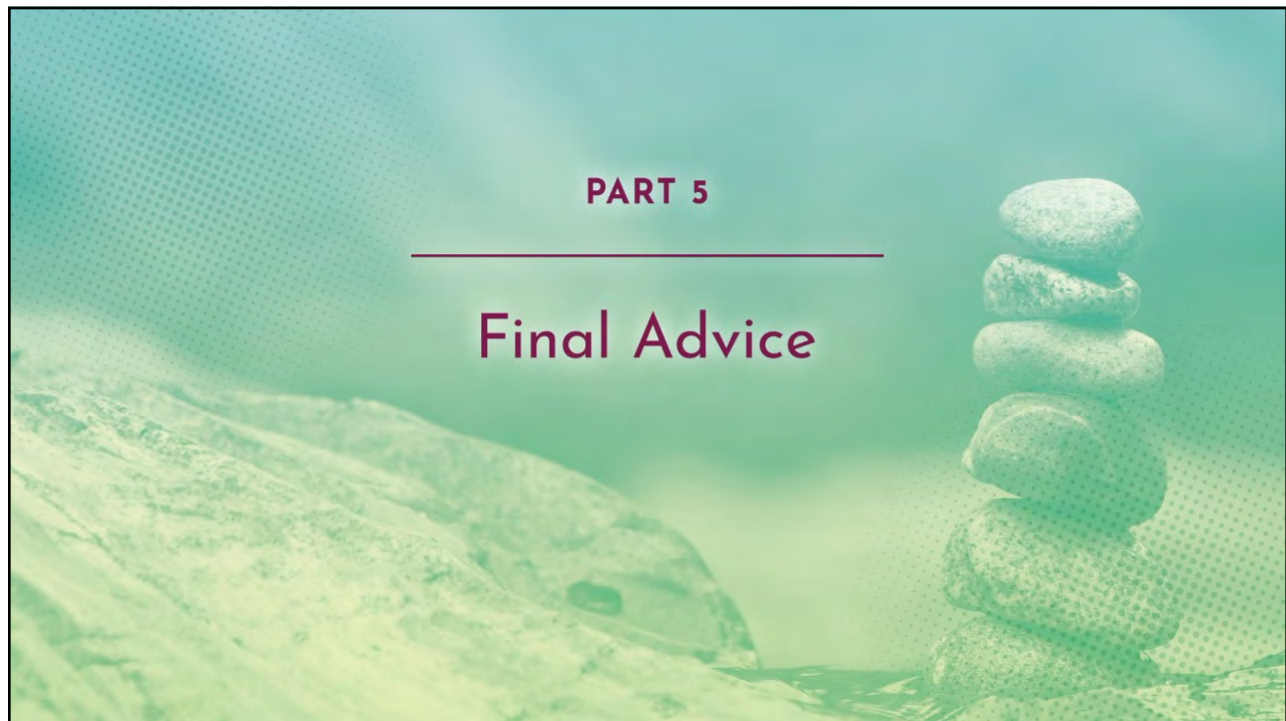
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UNDERTAKING DEI INITIATIVES:

- Draw on your experiences
- Help employees take charge of their careers
- Encourage and empower champions
- Instill an environment of participation and accountability
- Focus on equity
- Monitor and communicate progress

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PART 5

Final Advice

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FINALADVICE

- Diversity alone is insufficient. Equity and inclusion must be part of the equation.
- Remember, change is a journey.
- It takes time.
- There is no one right way to do equity work.
- Research shows that having leadership buy-in and trail-leaders at your organization is the magic ingredient.

Fatima Dainkeh, DEI practitioner