



April 27-29, 2025
The Peabody Memphis | Memphis, TN



Sunday, April 27

2:30 PM	5:00 PM	BADGE PICKUP Grand Ballroom East Mezzanine
3:30 PM	4:30 PM	MEET, GREET AND EAT Rooftop or Grand EF Session to meet New Members and First Timers
4:30 PM	6:00 PM	ITA GENERAL SESSION Grand A-C President's Welcome - Geni Whitehouse KEYNOTE: The Art of Achieving Ambitious Things - Jia Jiang
6:00 PM	7:30 PM	SUNDAY NIGHT WELCOME RECEPTION East Mezzanine
7:30 PM		Dinner On Your Own and Various Partner Events

Monday, April 28

7:00 AM	5:00 PM	BADGE PICKUP Grand Ballroom East Mezzanine			
7:00 AM	8:00 AM	BREAKFAST Continental Ballroom			
8:00 AM	9:30 AM	GENERAL SESSION Grand A-C ITA's Leadership Alliance (ILA) Graduation - Geni Whitehouse & Bret Romney KEYNOTE: Making an Impact - Dr. Rick Rigsby			
ROOM LOCATION		Grand A	Grand B	Grand C	
10:00 AM	12:00 PM	WORKSHOP 1 Change Minds in a Changing Landscape: Communication to Stand Out, Win Trust, and Gain Credibility Mark Bowden	WORKSHOP 2 Take Center Stage Misty Megia	WORKSHOP 3 Meta-Trends and the Next Economy Mark Parrot	None Planned
12:00 PM	1:15 PM	LUNCHEON Continental Ballroom			
1:15 PM	3:15 PM	WORKSHOP 1 Change Minds in a Changing Landscape: Communication to Stand Out, Win Trust, and Gain Credibility <i>(continued)</i>	WORKSHOP 2 Take Center Stage <i>(continued)</i>	WORKSHOP 3 Meta-Trends and the Next Economy <i>(continued)</i>	None Planned
TRACKS & SESSIONS		CONSULTING & RESELLING (CR)		CLIENT ACCOUNTING SERVICES (CAS)	INTERNAL TECH LEADERS (ITL)
		CR TRACK COMBINED Grand B		Grand C	ITL TACTICAL Grand A
3:30 PM	5:00 PM	ERP of the Future		Advocacy in Action	ITL Tactical Roundtable: How Are You Using AI Agents or Other Cutting Edge Tech to Make Your Operational Area More Efficient? ITL Strategic Roundtable: ERP & Firm Systems - Where Are We All on Our Journey and What Lessons and Questions Can We Share? <i>(Closed Session- CIO'S only)</i>
5:00 PM	6:00 PM	None Planned		ITL & CAS Joint Session Balancing Growth & Governance: A Business Leader & CFO in Conversation Grand A <i>(Beverage Service)</i>	
6:00 PM	9:00 PM	MONDAY PARTY and DINNER Peabody Rooftop and Skyway <i>You don't want to miss this!</i>			

Tuesday, April 29

7:00 AM	8:00 AM	BREAKFAST Continental Ballroom			
TRACKS & SESSIONS		CONSULTING & RESELLING (CR)		CLIENT ACCOUNTING SERVICES (CAS)	INTERNAL TECH LEADERS (ITL)
		CR TRACK 1 & COMBINED Grand B	CR TRACK 2 Grand D	Grand C	ITL TACTICAL Grand A
8:00 AM	9:15 AM	The Rise of Agentic AI in ERP	EOS Integrator Best Practices and Practical Implications, Succession Implications	AI in Action: A Practical Guide to Reaping the Benefits	Data Governance & MS Purview
9:30 AM	10:45 AM	Reseller Benchmarks - Insights from Spire Research	Pricing Precision: How to Set Profitable Service Rates without Losing Clients	Pricing for Success	Identity & Access Management (Internal & External)
11:00 AM	12:15 PM	Consolidation Effects on Customer Retention (Who Wins - David or Goliath?)	Keeping Your Best : Talent Retention for Organizations	Evolution of CAS advisory Structures and How It Impacts Go To Market Strategies	Establishing Inspiring Career Paths & Identifying/Growing Next Gen Talent
12:15 PM	1:30 PM	LUNCHEON Continental Ballroom			
1:30 PM	2:45 PM	Roundtable ERP Trends Continued Grand B		Fireside Chat, Roundtable CAS Wrap Up	ITL Tactical Roundtable
2:45 PM	3:15 PM	Wrap Up Session - ALL Tracks Grand B			

Wednesday, April 30

8:30 AM	3:00 PM	ITA Leadership Alliance (ILA) Base Camp - TBD (Note: Separate Registration Required)
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Consulting & Reselling - CR
Internal Technology Leader Tactical - ITL-T
Internal Technology Leader Strategic - ITL-S
Client Accounting Services - CAS

KEYNOTE General Sessions – By Date and Time

Sunday, April 27 - 4:30 to 6:00 pm - Welcome and Sunday Keynote (75 CPE Minutes)

4:30 – 4:45 pm

President's Welcome & Introductions

Room: Grand A-C

Geni Whitehouse – ITA President, Napa, CA

ITA President Geni Whitehouse will introduce our Spring Collaborative Committees and welcome our new members and guests. She will also provide an overview of the Spring Collaborative agenda prior to introducing our Sunday night keynote speaker.

4:45 – 6:00 pm (75 CPE)

KEYNOTE: The Art of Achieving Ambitious Things

Room: Grand A-C

Jia Jiang – Award Winning Keynote Speaker & Best-Selling Author, San Francisco, CA

Discipline is the ability to consistently take hard action. It is the key to achieving any long-term success.

Three controllable elements determine how high a group or an individual can go: Ambition, Resilience and Discipline. Whatever is the lowest, that's where you usually will end up with.

Most people think discipline is obtained through a combination of inspiration, willpower, and pain tolerance. But that's not reality. In the long term, people will do anything to avoid pain. As a result, most people fail to achieve personal goals, and most organizations fall short of their expected results.

In this talk, bestselling author Jia Jiang introduces unconventional tools and systems to elevate resilience when facing rejections, and operate with real, sustainable discipline to achieve our high ambitions. It's not about tolerating the work you hate but building tools to love the work you do.

Key Takeaways:

Through inspiring, humor-filled stories, Jia illustrates the hidden gems he uses to make himself fall in love with the hard actions needed to achieve his ambitious goals, including business building, sales mastery, networking, fear conquering, public speaking, language learning, and even parenting. The audience will not only gain a brand-new perspective on resilience, success and discipline, but also be equipped with ready to use tools to make an impact at their work and in their life.

Monday, April 28 – 8:00 to 9:30 am - Monday Morning General Session & Keynote (60 CPE Minutes)

8:00 – 8:20 am

ITA's Leadership Alliance (ILA) Graduation – Class of 2024-25

Room: Grand A-C

Geni Whitehouse – ITA President, Napa, CA

Bret Romney - Ascend Strategies, Inc., Montana City MT

ITA President Geni Whitehouse and ILA Instructor Bret Romney will present the 2024-25 Class of the ITA's Leadership Alliance (ILA) with their graduation certificates.

8:30 – 9:30 am (60 CPE Minutes)

KEYNOTE: Making An Impact

Room: Grand A-C

Dr. Rick Rigsby – Award Winning Speaker-Journalist & Best-Selling Author, Dallas-Fort Worth, TX

We live in an era of astonishing technology, instant information and rampant social networking. Despite the epidemic advances that ushered in a new millennium, cultural critics argue that society has never been more shallow in communication and more superficial in appearance. In fact, Dr. Rigsby argues that for many organizations, appearance- or what he refers to as impression- has become the new corporate wardrobe.

Deep Dive Workshops

Monday, April 28 - 10:00 am to 3:15 pm (with lunch from Noon to 1:15) – (240 CPE Minutes)

Workshop 1

Change Minds in a Changing Landscape: Communication to Stand Out, Win Trust, and Gain Credibility

Room: Grand A

Mark Bowden – Bestselling Author & Expert in Body Language, Human Behavior & Communication, Toronto, Ontario, Canada

In today's rapidly evolving and often unpredictable business world, having exceptional communication skills are critical for your success—especially when it comes to your ability to be influential and change people's minds around complex technical information. This session with leading body language and communication expert Mark Bowden, designed specifically for ITA members, offers you the most practical techniques and strategies to influence others and secure buy-in from internal and external stakeholders.

You will learn powerful verbal and nonverbal communication techniques to simplify complex concepts, making them accessible to a wider audience. You will also discover how to influence diverse groups, navigate organizational dynamics, manage yourself and others through cultural changes, as well as handle often difficult internal politics. Whether you are leading client discussions, presenting to executives, or guiding teams through transitions, this session will equip you with the right tools to enable you to deliver a compelling, impactful message with clarity and confidence.

By the end of this session, you will be able to:

- Present your perspective confidently, with both words and actions, even in high-pressure leadership settings.
- Communicate technical concepts more clearly to internal and external stakeholders.
- Manage yourself and others through organizational change to encourage collaboration and success.
- Read the room effectively and position yourself as a subject matter expert and leader.
- Navigate chaos calmly and emerge assertive on the other side.

Your survival and success will be a result of your ability to stand and remain strong in the face of change. This highly interactive and practical session is tailored for professionals seeking to strengthen relationships, enhance leadership communication, adapt to and thrive in the fast-paced, ever-changing business and organizational landscape.

Workshop 2

Take Center Stage

Room: Grand B

Misty Megia – CEO & Award winning Keynote Speaker, Brentwood, CA

Center stage is the most commanding and influential position on any stage—yet it also exposes you to the greatest vulnerability, as all eyes are locked on you. In our session, we will master how to step into this space with unwavering confidence, uncover the invisible barriers holding you back, and harness one of the most dynamic tools in communication. By learning how to own the center stage, you'll not only unleash your full potential but also gain access to the essential strategies that will allow you to speak with unmatched authority and impact. Together, we will unlock your unique mission and transform your presence into an unmistakable force.

Learning Objectives:

- Recognize where we've been playing small and take action to claim the spotlight with authority
- Develop key strategies of non-verbal communication that is more powerful than your verbal communication
- Unlock the go-to tools to deliver with clarity, confidence, and undeniable presence

Workshop 3

Meta-Trends and the Next Economy

Room: Grand C

Mark Parrott - CEO, Speaker & Best-Selling Author, Hauppauge, NY

During this interactive presentation, Mark Parrott will answer the question: "How do I stay relevant in the next decade?". He will speak to each audience about how to survive and thrive in these most challenging times. The audience will take away tactical strategies to improve their net worth and the motivation to do so today. Most importantly they will know how to protect their wealth and business in the next economy.

Key issues to be covered:

- Are you or your customers future dinosaurs?
- How to firewall business against recession?
- How to nail that new normal?



NASBA Registry Information

Credit Hours: Up to 16.5 hours of CPE available. Basis: CPE credits are granted on a 50-minute hour. After the first hour, sponsors can report half-credits. **However**, half-credits are not allowed / approved in all states. If half-credits are **not** allowed, participants need to round back to the last full credit.

Learning Objective: Depending upon the sessions you choose to attend, you will learn best practices and hear what other industry leaders are doing with respect to: current and emerging technologies, practice and project management, staffing, marketing, and customer/client service.

Program Content: The program will feature tracks of educational content: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and perhaps others. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member clients or their businesses to be more successful.

Field of Study:

Business Management and Organization

Level – Update

Prerequisites – Minimum 3 Years as an IT Consultant or Technician

Advance Preparation – None

Instructional Delivery Method – Lecture & Discussion

NASBA Registry of CPE Sponsors

Information Technology Alliance (#107740) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Administration

Records are maintained in accordance with CPE requirements. Questions, concerns or for more information regarding administrative policies such as complaint or refund should be made in writing to ITA Headquarters, 514 Daniels Street, Suite 361, Raleigh, NC 27605, Telephone (480) 515-2003.