

<u>Breakout Session Title</u>	<u>Breakout Session Description Full (approx. 500 characters)</u>	<u>Learning Objectives</u>	<u>Recommended CPE Credit</u>	<u>Field of Study</u>	<u>Breakout Session Level</u>	<u>Prerequisite to Attend</u>	<u>Advance Preparation Needed (if any)</u>
5 "Zaps" You can Use to Automate Your Processes	<p>Learn how to use Zapier to connect apps you already use in your business, like QuickBooks, Sharefile, Gmail, Slack and more. Heather will demonstrate how to build 5 "zaps" that can streamline common business processes and eliminate data entry errors and increase efficiency. In addition to learning to create 5 specific "zaps", you'll learn how to think "outside the box" when using and implementing apps by adding Zapier to your toolbelt.</p> <ul style="list-style-type: none"> <li>• Automate W-9 collection</li> <li>• Automate document collection</li> <li>• Automate blog postings</li> </ul>	<ol style="list-style-type: none"> <li>1. How to use Zapier to connect apps that don't have a direct integration.</li> <li>2. How to create 5 zaps you can use in your business now.</li> <li>3. How to think "outside the box" when contemplating an integration.</li> </ol>	1	Computer Software and Applications	Advanced	Intermediate working knowledge	None
5 Steps to Generate More Referrals and Leads	<ol style="list-style-type: none"> <li>1. Focus on the Benefits</li> <li>2. Referrals, referrals, referrals</li> <li>3. Local</li> <li>4. Online</li> <li>5. Content</li> </ol> <p>During the session, Michelle will encourage interaction from attendees to share their experiences and things that have either worked for their business or weren't successful. Come ready to share your experience, ask questions and set goals to implement after the conference.</p>	<ol style="list-style-type: none"> <li>1. Identify the benefits you provide to your clients / customers and how to create effective 'tag lines' or 'phrases' to use in marketing or when meeting people.</li> <li>2. Clarify the most effective methods and best practices for generating referrals and leads along with marketing and networking locally and online.</li> <li>3. Create specific goals for your business to implement after the conference to help increase your referrals and leads.</li> </ol>	1	Communications and Marketing	Beginning	Open to anyone	None
5 Tips to Crank Up Your Impact & Results on LinkedIn	<p>5 Tips to Crank Up Your Impact &amp; Results on LinkedIn</p> <p>How to Make One of the Largest Social Media Networks Work for You! You undoubtedly have received invitations from business partners and associates to connect on LinkedIn. And you took a couple hours out of your busy life and created a profile. Perhaps you even sent out some invitations to connect to people in your business network. but, "Is that all there is?"</p> <p>Learn the 5 steps to maximize your presence on LinkedIn so you can find opportunity!</p>	<ol style="list-style-type: none"> <li>1. Beyond the basics, how to make your headline, image stand out.</li> <li>2. Learn to tell your story and build your brand</li> <li>3. Create a profile that helps you connect.</li> </ol>	1	Communications and Marketing	Intermediate	Open to anyone	None
A Guide to Attracting and Serving Non-Profit and Government Clients	<p>This session will give you an in-depth understanding of how to build and develop a niche-based practice that focuses on Non-Profit and Government Clients. You will come away understanding key things you need know to serve these clients, including the Technical Expertise you should have before going to market to properly understand these clients. You'll also learn key ways to reach these clients via advertising and marketing. Lastly, the session will cover additional value-added services you can offer that your new niche clients will love.</p>	<ol style="list-style-type: none"> <li>1. How to choose niche market clients</li> <li>2. Technical Expertise needed to market services to Non Profits and Government Contractors.</li> <li>3. Additional Value Added services that can be marketed to Non Profits and Federal Contractors</li> </ol>	1	Specialized Knowledge	Intermediate	Basic working knowledge	None

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Accountants and Bookkeepers go together like Peas & Carrots	Technology is continuing to drive rapid change in the bookkeeping & accounting professions; in many cases this is leading to uncertainty, anxiety and inertia in how to respond to this threat/opportunity. The lines of demarcation are becoming blurred, with accountants venturing into the "traditional domain" of bookkeepers, technology automating bookkeepers' data entry roles & bookkeepers becoming technologists. So can accountants, bookkeepers & software consultants happily coexist & thrive in the future? The answer is a resounding YES! But how?	Find out how to proactively participate in your own redundancy (of tasks) before technology does  Learn how Accountants can play a vital mentoring role for budding entrepreneurial Bookkeepers  Discover new roles that provide a golden opportunity to create a bookkeeping and accounting business that is built to keep.	1	Business Management and Organization	Intermediate	Open to anyone	None
Accountants Walking Tour of the Expo Floor	Join David Leary for a walking tour of the expo floor to learn about all the great parts of the QuickBooks Online ecosystem.	1) an overview of all the entire QuickBooks Online ecosystem that is in attendance 2) enough of high level guidance so an attendee can create a plan of which booth to visit more with 3) a great stretch of their legs while networking with peers and learning about new apps	1	Computer Software and Applications	Beginning	Open to anyone	None
Advanced QBO - All About Job Costing!	This session will teach you how to set up job costing in QBO including using budgets to act as estimates to get estimate vs actual reports. It will teach you how to job cost owners time as well as how to allocate payroll and overhead to jobs. It will touch on using the new Projects feature that is currently in QuickBooks Labs.	1) Using budgets to get estimate vs actual reports 2) Job costing owners time 3) Job costing of payroll and overhead expenses	1	Accounting	Advanced	Intermediate working knowledge	None
Automating Processes: The Path to Extreme Profitability for the Accounting Profession	This session provides a survey of the technologies reshaping the space and an exploration of the types of technologies accountants should deploy to automate processes, standardize workflows throughout their practices, and provide real time access to their clients' operational data (e.g. sales, inventory tracking, project work, field service activities, etc.)	During this session you will:  · Explore the latest technology innovations impacting both the accounting profession and the whole of small business  · Discover the power of process standardization and its connection to automation, profitability and succession planning  · Learn effective ways to stack small business technologies and integrate them with QuickBooks to eliminate up to 80% of manual bookkeeping processes	1	Computer Software and Applications	Intermediate	Intermediate working knowledge	None
Build a winning team by systemizing	This course identifies how to start the process of systemizing your workflows. Learn how to dissect the steps you take to provide services, then put them back together as a simple process that can be implemented by members of your team. Learn how to build a knowledge base so you can feel good about increasing your team. Start creating processes that new team members can easily understand and start using immediately.	1. How to dissect the steps of your services and create a systemizing process. 2. How to create a knowledge base to store your newly created processes. 3. How to implement your new systemized process for new employees.	1	Business Management & Organization	Beginning	Open to anyone	None
Building a Practice Around the Construction Niche	Finding a niche is the fastest way to build your practice, and the construction market provides an excellent opportunity with over 750,000 employers in the U.S. alone.  And with today's hot construction market, contractors need all the help they can get. But first you need to be able to speak to their needs, answer their financial questions and help them understand the key to profitability. Then you can improve build reputation and elevate your practice.	· Learn how to speak the contractors' language  · Gain a better understanding of markup and margin, and the need to use percentage of completion to measure true profitability  · Find ways to get more involved in the construction industry to find clients and educate yourself on their needs	1	Specialized Knowledge	Beginning	Open to anyone	None

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Candidate Attraction: Communicating your Employee Value Proposition to Attract and Retain Top Talent	With the National unemployment rate at 4.5%, and the "War for Top Talent" in full force, some say it's harder to find employees than customers. The importance of defining your Employer Brand and Employee Value Proposition are more important than ever. Small businesses have a unique advantage over big corporations in being able to implement these tools quickly. And, with the proliferation of social media, being able to share your message is simple and cost effective.	How to define your Employer Brand  How to develop your Employee Value Proposition  Strategies for attracting & retaining top talent  The difference between a job description and a job ad (with handout)	1	Personnel/Human Resources	Beginning	Open to anyone	None
Cost Accounting, R.I.P.: Why Modelling Cash Flow is Superior	Join Ron Baker as he challenges your world-view and proves how cost accounting is inferior to cash-flow and capacity modelling. The lesson is that a company needs to start with value, then determine price, which finally justifies the costs that can be profitably incurred to produce a good or service desired by customers. Ron will show you how to do this in this advanced-level session.	Learning Objectives  • HOW modeling cash flow and capacity is superior to cost accounting  • The Adaptive Capacity Model  • The difference between metrics and measurements  • Steps to take to move to Cash Flow/Capacity Modelling	1	Accounting	Intermediate	Basic working knowledge	None
Creating an Exit Strategy for the Solopreneur	This session explores the topic of how a Solopreneur can successfully retire. The two primary exit strategies will be discussed; liquidation or continuation. We will also explore the important questions each owner must answer to make the best decision based on his or her unique needs and wants. And then delve into the key steps one must take to fulfill that exit strategy. No matter what your age, it's never too early to start considering and planning your exit	1) Create a list of personal issues to help decide between the two primary strategies  2) Create a personal timeline for your exit strategy  3) Determine key steps to take once an exit strategy has been chosen	1	Business Management & Organization	Beginning	Open to anyone	None
Creative Marketing Ideas for Accountants	Marketing and selling have confused small business owners for many years. How are they related, and when should you commit to one or the other? If you don't feel adept at selling yet, maybe you should try some new marketing ideas to make your selling easier. More creative marketing ideas can make your selling easier when the time comes to sell your expertise. Let's explore these ideas together!	1. Learn what the difference is between selling and marketing.  2. Learn new creative marketing ideas firm owners can try.  3. Learn the role of the firm owner in the sales/marketing process.	1	Communications and Marketing	Beginning	Open to anyone	None
Earn More & Work Less	Earning more and working less is simpler than most realize. Learn a simple process being used by hundreds of your colleagues to produce extraordinary results with less effort. This is not about technology, marketing, or anything like that. It's about the human factor, the most critical, yet often ignored factor in our quest for success.  Learn how self-limiting beliefs operate, and how to peel them away to uncover a greater set of possibilities. If you're ready to be inspired and awakened to new possibilities for success, come join us!	Learn to clear out self-limiting beliefs that unnecessarily limit your success.  Discover an empowering, mindful approach to achieving better results with less effort.  A practical, proven process you can apply to improve any area of your practice or business.	2	Personal Development	Intermediate	Open to anyone	None
High Impact Leadership Principles	Leaders who have the highest impact apply straightforward leadership principles in multiple arenas: such as creating/maintaining client relationships, managing their team (whether it is their internal team or a team that includes external and client resources), and in the critical capacity of guiding their clients through intensive change. Join Joe Woodard as he discloses the key high impact leadership principles you can quickly apply in your practice.	In this session you will learn: • High impact leadership principles you can quickly apply to your client relationships • Strategies for transforming your client interactions from compliance to consulting • Methods for managing teams and team dynamics – both within your firm and within your clients' organizations	1	Personal Development	Beginning	Open to anyone	None
How Non-Techies Can Drive Integration with QBO/QBOA	Designed for non-techies, this session will teach participants to analyze the QBO ecosystem of apps to figure out the architecture and schematics for the "digital plumbing" that determines what apps should be connected to what other apps ("integrated") and what information needs to be shared between apps.	* The different components and business solutions available to improve financial and other "back office" operational functions.  * How to analyze what application and data needs are and how to use these to drive technology selection and definition of functionality requirements.  * How to develop their Intraprise Architecture and how to do trade-off analysis between broad solutions and niche solutions to optimize their technology investment.	1	Computer Software and Applications	Intermediate	Open to anyone	None

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How To Build a Marketing Plan and Execute It Year-Round	A strategic marketing plan addresses not only the key activities and objectives of your growth activities; it also sets your business up for success through accountability of deliverables. A good marketing plan will align tools with tactics that you can use to achieve your revenue goals. This course will walk you through creating a marketing plan but also provide tools to keep it on track throughout the year, including a budget tracker and marketing calendar.	<ol style="list-style-type: none"> <li>How to create a marketing plan</li> <li>How to measure results of campaigns</li> <li>Receive tools including a budget tracker and marketing calendar to customize for their business</li> </ol>	2	Communications and Marketing	Beginning	Open to anyone	None
How to Build Credibility with Prospects and Clients	Designed for numbers people who work with owners, this class will provide concrete tools and action steps to help you translate the language of business into meaningful, actionable insights. It's not enough to balance and reconcile, categorize or code, we must become guides who lead our clients towards their unique goals and objectives. In this session, you will learn about questions to ask, models to build, and online applications to harness in pursuit of serving your clients in a more meaningful (and enjoyable) way.	<p>How to bring numbers to life</p> <p>How to make a difference in small business owners' lives</p> <p>How to increase your value to your clients</p>	1	Communications and Marketing	Beginning	Open to anyone	None
How to Develop, Price, and Sell Advisory Services	Are you considering making the transition from accountant to "Trusted Advisor" but don't know where to start? Do you wonder how to market, price, and sell advisory services and especially whether your clients will bite? If so, this course will show you how to turn your client's accounting departments into profit centers as well as increase their financial literacy. You'll learn three tools that will help you offer a higher level of service to your clients while making more for yourself.	<p>After completing this course, participants should be able to:</p> <ul style="list-style-type: none"> <li>List three major areas you can assist your clients with revenue generation</li> <li>Name three tools you can share with your clients to help them gain insights into revenue generation</li> <li>Describe two approaches to advisory packages</li> </ul>	1	Communications and Marketing	Intermediate	Basic working knowledge	None
How to Double your Clients' Profits in 5 Easy Steps, Increase your Revenues, and Have Fun Doing It.	This session starts by looking at the global economic landscape and examining the biggest challenges facing small business owners in scaling up and growing profitably. Using a simple 5 step approach that all accountants are eminently qualified to deliver, you will learn how to add advisory services to your compliance assignments. This creates better results for your clients and more rewarding work and fun for you and your team. We will also look at a number of ways to price these services and get paid for the value you create.	<p>How to build build advisory services within your firms offering.</p> <p>How to advise a client how to grow profitably and sustainably.</p> <p>How to get paid for the value you create.</p>	1	Business Management & Organization	Intermediate	Basic working knowledge	None
How to Increase your Profitability as a Solopreneur QuickBooks Consultant	Are you a sole practitioner with a fear to grow too quickly and not be able to service your clients well?  Are you a late adopter of the client collaboration tools that will allow you to work smarter, faster and more efficiently with your clients?  Have you taken advantage of the strategic vendor and business partnerships you can create within your current social community which can bring in additional income and empower your small business clients?	<ol style="list-style-type: none"> <li>streamline, automate current bookkeeping processes (i.e. utilize QBOA + QBO and/or QBOA + QBSelf-Employed to create one cohesive accounting solution amongst all accounting clients)</li> <li>utilize real-time client communication collaboration tools (i.e. use Slack for your business and with all your clients)</li> <li>create strategic partnerships with key players in your industry which will provide additional business income (i.e. create relationships with lenders, CPA, financial planners, insurance agents, vendor affiliate programs, etc)</li> </ol>	1	Business Management & Organization	Beginning	Open to anyone	None
How to Use QuickBooks Self-Employed to Organize Your Clients for Tax	QuickBooks Self-Employed is a tool designed especially for clients who file a Schedule C. But which clients should use it and how can you leverage this technology in your tax practice? In this session, you learn best practices to introduce your clients to QBSE, help them organize their income and expenses, create a mileage log and set them up for success for the next tax year by creating a system for them to keep track of their profit, mileage and estimated tax payments.	<ol style="list-style-type: none"> <li>Which clients are a good fit for QuickBooks Self-Employed.</li> <li>How to use QuickBooks Self-Employed to organize Schedule C income and expenses for an entire year.</li> <li>Techniques to troubleshoot and review QuickBooks Self-employed data.</li> </ol>	1	Accounting	Beginning	Basic working knowledge	None

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I'm QBO Certified....Now what?	<p>During this session you will:</p> <ul style="list-style-type: none"> <li>-Understand, set up and optimize your ProAdvisor profile</li> <li>-Deep dive apps that can streamline your accounting processes ex: Practice Ignition, Expensify, Karbon, Bill.com, HubDoc....etc.</li> <li>-Navigate the full QBOA experience and the tools at your fingertips</li> <li>-Determining your billing value</li> </ul>	<p>Prerequisite: QBO Certified and interested in moving your practice to the cloud.</p> <p>Takeaways:</p> <ul style="list-style-type: none"> <li>-Optimize your ProAdvisor profile and start attracting new business</li> <li>-Find and implement the perfect apps to enhance your practice</li> <li>-Leave this workshop confident in your QBOA and ready to take the next steps</li> </ul>	1	Computer Software and Applications	Intermediate	Intermediate working knowledge	None
In the Cloud or Not, You and Your Staff are the Biggest Security Threat	<p>Firewalls, Anti-Virus, Intrusion Detection Systems and all the technical fences we can build are not enough to protect you, your staff and your clients! The human element is often overlooked and is your biggest threat.</p> <p>In this session you will learn the simple tips and tricks to protect your data from each of the many threats trying to gain unauthorized access. These tips and tricks will not only protect you, they will help to keep your organization insurable under your Cyber Security Insurance policy.</p>	<ul style="list-style-type: none"> <li>-How to test yourself and your staff on the level of risk inside your organization.</li> <li>-Learn real life examples of security incidents that could have easily been avoided.</li> <li>-Walk away with the knowledge to practice safe computing.</li> </ul>	2	Information Technology	Beginning	Open to anyone	None
Key secrets to creating an innovative culture at your accounting firm	This session will show how to create and drive an innovative culture. It needs to be the new norm for accounting firms. Cloud accounting was the beginning of never ending change headed for the industry. As the technology continues to disrupt and progress, firms need to know how to get the best out of their teams. Come and learn how to drive innovation in your firm, regardless of the size.	<ol style="list-style-type: none"> <li>1. What does it mean to be an agile accounting firm.</li> <li>2. Software/hardware that can be used to implement this.</li> <li>3. How to implement an agile mindset in their accounting firm and be more successful in their roles. (interactive, audience participation needed)</li> </ol>	1	Business Management & Organization	Beginning	Open to anyone	None
Law Firms = Opportunity!	As the legal industry ages and non-digital or barely digital business processes are no longer accepted by Millennials or Gen Y, there are many opportunities for the small business advisors (SMA). However, the SMA first needs to understand the unique environment a law firm is mandated to operate within.	<ol style="list-style-type: none"> <li>1.) An understanding of the relationship between the American Bar Association, the State Bar Association and a law firm</li> <li>2.) The current technology issues facing an aging legal industry</li> <li>3.) The role legal practice management software plays in being Bar compliant</li> </ol>	1	Specialized Knowledge	Beginning	Basic working knowledge	None
Moving from Bean Counter to Thought Leader... and beyond!	<p>Carl left school before his exams to become an apprentice hairdresser - find out how he learned to speak up, stand out, in the national press, on radio, and on TV; even though he is the self proclaimed "world's worst accountant"!</p> <p>He will explain some key learnings about how to:</p> <ul style="list-style-type: none"> <li>- identify your personal USP's</li> <li>- understand what your customers and prospects want</li> <li>- get your message out there</li> <li>- differentiate yourself</li> <li>- make your mark in business and in the world</li> </ul>	<ol style="list-style-type: none"> <li>1) a crystal clear understanding that being one of many accountants, in a sea of grey, just doesn't cut it any more</li> <li>2) actionable steps to help them stand out in their town, their networks, and their niche industries</li> <li>3) confidence to be themselves</li> </ol>	1	Personal Development	Beginning	Open to anyone	None
Navigating the External Financing Journey with Your Clients	Many of your small business clients will need external financing to achieve their business goals. Come and get the inside scoop on what you need to know to be your client's ultimate guide as you navigate this journey together. Hear from the experts on what they look for, which financing options might be best for your unique clients, and how you can set up your clients for financing success.	<ol style="list-style-type: none"> <li>1) Understand the range of financing options for your clients</li> <li>2) Learn which option is the best for which client, depending on their unique circumstances</li> <li>3) Learn what banks are looking for in terms of financial ratios and performance, so you can help your clients should they choose that route.</li> </ol>	1	Finance	Beginning	Basic working knowledge	None

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Planning and Focus - The Real Keys to Success	There's been a lot of talk for many years about all kinds of technology, but have we lost sight of the fundamentals? The real keys to Success are planning and focus. These are two things which can be done with a pen and paper, but since we're in the information and edge computing age, we'll use technology to show you how to set your goals, create your plan, and execute the plan.  Then we'll show you how to use the very elements of your plan to stay laser focused, so you can reach your goals.	Learn the art of setting goals that motivate and inspire you.  Learn how to develop a detailed revenue model in Google Sheets.  Learn how to maintain the model daily, weekly, and monthly to stay the course.	1	Personal Development	Intermediate	Open to anyone	none
Power Panel - All About Apps	Come and explore all facets of adding apps to your client service mix. From vetting them, to integrating, to creating tech stacks for verticals, this panel of experts will share their expertise as well as tips to help you be more productive and profitable using apps.	How to save 2+ hours a week when making meeting appointments.  Apps that deliver new revenue streams for your practice.  How to automate the chase for client information.  How to vet apps, integrate them, and choose Tech Stacks for verticals	1	Computer Software and Applications	Intermediate	Open to anyone	None
Power Panel - Building a Million Dollar Firm	Specializing in niches like Churches, Non-Profits, Construction and the Wine Industry can bring big profits and lots of referrals to your business, but do you know what their special needs are? The rules surrounding each Niche? The education you might need to support these niche clients? And what about how to attract them? Come and learn from 4 industry experts who can lay it all out for you.	Participants in this session will learn: 1) How specializing in a narrow niche can benefit your firm, your staff and your clients 2) Specific aspects to Churches, Non-Profits, Construction and the Wine Industry that you need to be aware of, to serve them well 3) What apps and technology you need in place to serve these 4 popular niches	1	Business Management & Organization	Intermediate	Open to anyone	None
Power Panel: A Deep Dive into 4 Popular Niches	Specializing in niches like Churches, Non-Profits, Construction and the Wine Industry can bring big profits and lots of referrals to your business, but do you know what their special needs are? The rules surrounding each Niche? The education you might need to support these niche clients? And what about how to attract them? Come and learn from 4 industry experts who can lay it all out for you.	Participants in this session will learn: 1) How specializing in a narrow niche can benefit your firm, your staff and your clients 2) Specific aspects to Churches, Non-Profits, Construction and the Wine Industry that you need to be aware of, to serve them well 3) What apps and technology you need in place to serve these 4 popular niches	1	Specialized Knowledge	Beginning	Open to anyone	None
Power Panel: Conversations You Should be Having With Your Clients	Come and hear our panel of experts as they discuss vital conversations you should be having with your clients. You'll learn how to uncover opportunities that lead to more revenue, how to deal with difficult clients, how to evaluate new clients and how to add more value with just a few key questions.	Participants in this session will learn: 1) Key questions to ask your clients in order to uncover new opportunities and add more value daily. 2) How to evaluate a prospective new client to ensure its a great fit for you and for them. 3) Key ways to leave your clients delighted with every interaction they have with you and your firm. 4) How to handle difficult conversations with clients, including how to let them go gracefully	1	Communications and Marketing	Beginning	Open to anyone	None
Practice Pathfinder - Realizing your Value, and Scaling without Making Radical Changes Overall	We believe that aggressive change is neither achievable nor desirable for ALL; That realistic goals and incremental change is more likely to yield tangible results; That this change will more likely form the bedrock of a more radical transition in time.  By the end of this session you will have taken six of the most pressing challenges most commonly faced by firms across the country and developed a solution that suits YOU.  This is the 7th, final session delivered live at Intuit's QB Connect conference in November.	Attendees will understand how to begin:  - Winning Higher End New Fees  - Accurately Forecast New Business Income  - Pricing For Maximum Profit	1	Business Management & Organization	Intermediate	Open to anyone	None
QBO for Real Estate Investors	Save taxes for your client by building a strong foundation for integrating daily back office management, accounting, and intelligent apps to help your clients analyze and understand when to capitalize vs repairs and track maintenance. After all, it is about the money spent and received during the process of purchasing, holding and selling the property. Create a ripple effect by educating yourself and your clients on the importance of tracking each property asset, liability, income, and expenses in real time. Be the hero!	- Identify and manage repair vs capitalized expenses  - Learn how to segment purchases and cost segregate  - Drive more insightful reporting with clients	1	Specialized Knowledge	Intermediate	Open to anyone	None

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QuickBooks Online Basics for Accountants and Bookkeepers	The world is moving to the cloud, but you haven't had the chance to move your clients onto QuickBooks Online yet. Come and learn how to move around in QuickBooks Online, and how to work with your clients using QuickBooks Online Accountant. This session is designed for beginners and will be accompanied by a step by step handbook to help you replicate what you learn when you get back to your office.	This session will cover:  Basic QuickBooks Online navigation techniques and options  How to use QuickBooks Online Accountant to set up and access your QBO clients  How to set up vendors and customers, enter bills and invoices, and use Bank Feeds to save time on data entry and increase accuracy.	1	Computer Software and Applications	Beginning	Open to anyone	None
Streamline - How To Make Your Accounting Practice Run On Automatic	Streamline - How To Make Your Accounting Practice Run On Automatic. Productivity is a myth! People just keep working harder and longer than ever before. Business efficiency is the key. In this presentation, Mike teaches the foundational secrets to make your business run on automatic.  1. Productivity Is A Myth  2. The 4 D's  3. Capture Systems  4. Protect The QBR  5. Free The Queen  6. The 4 Week Vacation ultimate acid test	1. Productivity Is A Myth - You will learn why productivity is your biggest enemy in running an efficient company.  2. The 4 D's - How to move your work from doing to deciding to delegating to designing. And why you must be a designer if you want to build a business that can run without you.  3. Capture Systems - You will discover that you in fact have every system you need ready at your beckon call, and how to easily transfer those systems to your team.	1	Business Management & Organization	Intermediate	Intermediate working knowledge	None
Supporting Clients Using QuickBooks Self Employed - a Deep Dive for Accountants and Bookkeepers	By 2020, over 40% of the US workforce will be self-employed. This represents a huge opportunity for your firm. This fast-paced session will help you understand what their needs are, how you can best attract and serve them, and what software and apps are best for their particular needs. You will also learn how to use QuickBooks Online Accountant and QuickBooks Self Employed together to maximize your efficiency and help you provide true value-added service without going crazy in the process.	1) Understand the market  2) Understand the needs of the self-employed, and how you can attract and serve them  3) Discover software and apps that are tailored to their needs	1	Specialized Knowledge	Beginning	Basic working knowledge	None
Taming The Wild West of Apps	Selecting the right and and successfully implementing it goes far beyond entering your credit card information. This session will focus on helping to identify the core of what you are looking for, comparing the options that are available, making a selection and ultimately implementing the solution successfully.	-Tips on identifying the right app for the right issue.  -Strategies for comparing the many options and making a selection.  -The keys to a successful launch of new app.	1	Computer Software and Applications	Beginning	Open to anyone	None
Tax Track - 10 New Productivity Features in ProConnect Tax Online	This session will demonstrate how ProConnect Tax Online (PTO) provides features that increase productivity for you and your clients, from the start of the engagement to delivery of the finalized tax return. See cutting edge technology that will help you improve how you collaborate with your clients, collect and import data, and other time saving tools that help you prepare tax returns for your clients. You will also be able to hear real world examples from a professional that has used PTO for years.	What's New in Intuit ProConnect Tax Online  Key productivity tools in Intuit ProConnect Tax Online  Tips for Navigating Intuit ProConnect Tax Online	1	Taxes	Beginning	Open to anyone	None
Tax track - Add Revenue with Tax Planning Packages	Forward looking tax planning, that saves clients' money, can be a clear differentiator that helps grow your practice & better communicate your value as trusted advisor. This session demonstrates how to add tax planning packages to complement your current offering, provide examples of building a living tax plan (with a ROI to the client), and provide best practices to engage clients throughout the year & update the plan utilizing ProConnect Tax Online, QBOA, and other apps.	Demonstrate to clients a ROI in your tax strategies  How to use PTO and other apps for tax planning  Community resources and support to be successful	1	Business Management and Organization	Intermediate	Intermediate working knowledge	None
Tax Track - Design your Dream Tax Practice	"In this session, you'll explore what it takes to identify which services and types of clients you should be targeting in order to build the practice of your dreams. Learn advisory strategies to improve client communication and make your interactions more meaningful. The guided case studies will motivate you to identify what you're good at and reflect on your current service options. You'll also learn how to re-evaluate your current pricing models and explore the potential for bundled packages.	Identify the services you want to provide, which clients to target, and the people needed to provide the services  Discover ideas to create service package options to add value and pricing options for tax preparation  Identify resources to help determine your pricing	1	Business Management and Organization	Intermediate	Open to anyone	None

<u>Breakout Session Title</u>	<u>Breakout Session Description Full (approx. 500 characters)</u>	<u>Learning Objectives</u>	<u>Recommended CPE Credit</u>	<u>Field of Study</u>	<u>Breakout Session Level</u>	<u>Prerequisite to Attend</u>	<u>Advance Preparation Needed (if any)</u>
Tax Track - Securing Client Data on your Network	Tax and accounting offices are the latest target of cyber-thieves, because you hold a wealth of valuable client information that criminals use to commit identity related theft and tax fraud. This session will cover the latest security threats to your practice, your network and your client data. We will review your regulatory requirements to protect and safeguard client data. Learn how to setup processes in your office to educate staff and better safeguard taxpayer data.	Identify common security threats, risks and scams to your tax and accounting practice; Develop a written security plan for your office; Implement processes to educate staff and better safeguard taxpayer data; Implement network security practices to prevent data theft.	1	Information Technology	Beginning	Open to anyone	None
Tax Track - Step Into the Future - Taking Advantage of Tax Technologies	Our world and the tools we use are constantly evolving, and new, maturing and emerging technologies will impact the tax and accounting profession just as they have impacted other professions and our personal lives. This session will provide a look into these technologies and a view into the tax and accounting professional's future clients, as well as provide some insight into how Intuit is leveraging these capabilities to help the profession reap the benefits they have to offer.	Awareness of new technologies  Perspective on how these technologies will shape the future of the tax and accounting profession  A view into what is available today and what is in the near term horizon	1	Computer Software and Applications	Beginning	Open to anyone	None
Tax Track - Transitioning Your Tax Office to the Cloud	Implement a paperless tax return workflow in order to be efficient & save time. Find out the best practices & learn a proven step-by-step process.  Work remotely with team members & clients. Develop staff in a remote environment. Motivate & run staff meetings remotely. Hear how to deepen client relationships & create awesome client experiences!  Tax professionals are still charging by the hour. Create tax packages that give clients more choices about the services they receive.	1. Implement a paperless workflow in your tax office 2. How to work remotely with your team and your clients 3. Create tax packages that provide clients more choices	2	Computer Software and Applications	Beginning	Basic working knowledge	None
Tax Track - Value Pricing for Tax Practices	This presentation will dive into the logic, reasoning, proof of concept, and implementation of aligning your interests with your client's interests regarding engagement, pricing, deliverables, communication and procedures as we move into a new era of value pricing for tax and accounting clients.	1) What are the tactical things I need to be doing now to advance using value pricing in my business 2) What are best practices regarding proposals, engagement letters, workflow tools and checklists, practice management and meeting how tos 3) Engage clients in a "Value Conversation"  including Leading your Clients to the Promised Land of Buying More from You; Identify key strategies for raising your prices, and how to incorporate this into Value Conversation	1	Business Management and Organization	Intermediate	Intermediate working knowledge	None
The Intentional Firm - Providing Exceptional Client Service	Great customer service starts from the inside out. Creating efficiencies in your firm improves profitability and strengthens your ability to provide exceptional service to your clients. This course will furnish you with sample checklists and invaluable guidance. It focuses on designing and developing solid internal systems and workflows for both your firm's internal processes and the services it offers, including the onboarding of new clients, managing client work and support, and guarding against scope creep.	- Recognize the importance of defining your processes  - Discover how to implement a system to manage client and firm workload  - Determine how best to monitor the firm at work and analyze the results	1	Business Management and Organization	Beginning	Open to anyone	None
The Modern Firm	What do brands like Amazon, Starbucks and Panera Bread have in common? They've each created a model for customer interaction that's low-friction and delivers a highly desirable experience. Similarly, in the accounting space, The Modern Firm combines efficiencies of automation with the human touches of world-class client experience. Join Rootworks CEO, thought leader and author Darren Root for an exposition of The Modern Firm. You'll learn a powerfully simple technique to assess your critical touch points, based on the familiar GPA scale.	- Benchmarking your business to World-Class  - Identifying and reducing friction in your business  - Understanding the journey to the technologies that will power your firm in 2020.	1	Business Management and Organization	Beginning	Open to anyone	none

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The new value pricing opportunity: The holistic cloud accounting system	The growth of the profession lies in advisory work. Advising on the best technology from the myriad of apps available is a big opportunity. QBO makes it easy to manage those apps. But how do you value price this valuable service? This session will dive into a practical application of my 7-step pricing formula and pricing strategies providing a step-by-step process for earning big fees when advising clients.	A framework for value pricing and getting higher prices  Communications skills for mastering the value conversation  How to calculate a value-based price	1	Business Management and Organization	Advanced	Open to anyone	None
Using QBO for Non-Profits: A deep dive into Contributions, Grant Tracking, and Donor Notifications	Nonprofits using QBO are encountering much difficulty in understanding how to get QBO to provide the necessary IRS required donor notification for individual donors. This class will walk through step by step the cleanest method of entering donations to allow for both a donor notification that can be easily e-mailed as well as donation summary reports that can be sent to donors at Year-end.  Additionally many non-profits have grants that are restricted and are struggling to understand the best method for tracking expenses that have been spe	1.) Be able to create and use IRS compliant donation notifications and Year-end reports directly from QBO  2.) Using a cutting edge method, Be able to create restricted grant reports showing how dollars were spent (compared to grant budget) without cluttering up the Profit & Loss with extraneous accounts.  3.) Be able to identify in detail best practices for importing/syncing of donations from CRM APPS into QBO.	1	Accounting	Intermediate	Basic working knowledge	None
Value Pricing Round Table - Learn from the Experts	This is a unique session designed to help each attendee learn what they specifically need to learn about Value Pricing. Taught in round-table discussion settings, each expert will lead table discussions tailored to where attendees are in their journey regarding Value Pricing. Additionally, attendees will receive a take-home document covering all topics, with best practices written by each expert.	1) Learn what value pricing really means and how it is different than fixed fee pricing 2) Learn why using value pricing increases the value of your services in your clients' minds 3) Learn how to develop a personalized action plan to implement value pricing for your practice 4) Learn how to switch existing clients to Value Pricing, and to get over your fear of implementing it in your firm	2	Business Management and Organization	Intermediate	Basic working knowledge	None
What's New in QuickBooks Online Accountant	Designed to help you get the most out of QuickBooks Online Accountant, this class will cover the new features added in the past year and how to use them to increase efficiency like never before. Bryce Forney, CPA, will cover the flow of data from QBO through to the tax return, and show you how to use the new Practice Management functionality to manage your team and gain complete visibility into who is working on what, and the status of each task, for each client.	1. Understand accounting professional tools available through QBOA 2. Understand how to operate more efficiently as an accounting professional working with client books 3. Recognize newly released tools within QBOA and how they impact your workflow	2	Computer Software and Applications	Intermediate	Basic working knowledge	None
What's New in QuickBooks Online Accountant (repeat - 1 hour session)	Designed to help you get the most out of QuickBooks Online Accountant, this class will cover the new features added in the past year and how to use them to increase efficiency like never before. Bryce Forney, CPA, will cover the flow of data from QBO through to the tax return, and show you how to use the new Practice Management functionality to manage your team and gain complete visibility into who is working on what, and the status of each task, for each client.	1. Understand accounting professional tools available through QBOA 2. Understand how to operate more efficiently as an accounting professional working with client books 3. Recognize newly released tools within QBOA and how they impact your workflow	1	Computer Software and Applications	Intermediate	Basic working knowledge	None
YouTube is the new business card: Telling your story via video to attract new clients	This session is taught by an accountant (Hector Garcia, CPA) that targets small business clients via YouTube; and is based on his experiences as a "YouTuber". However, the lessons learned from YouTube marketing apply to any small business owner or entrepreneur that wants to leverage video. This session will focus on creating a YouTube Channel, creating/uploading an informational video, and tracking the results from the video. By simply telling your story in YouTube, clients will come to you.	-Learn How to create a YouTube Channel and upload your videos  -Understand the type of videos that people want to watch (depending on your target audience) to be an effective content creator  -Learn the techniques to track and interpret YouTube Analytics	1	Communications and Marketing	Beginning	Open to anyone	none