

# 2017 CPAs in Business and Industry Conference Agenda

## 8:30-9:30 a.m. General Session

### Indiana Economic Update

[Gerry Dick, Inside INdiana Business](#)

The host and creator of *Inside INdiana Business* television, Dick also serves as president and managing editor of Grow INdiana Media Ventures, LLC, an Indianapolis-based media company focused on producing and distributing Indiana business news and information through multiple media channels. In this presentation, he will discuss issues related to Indiana business and the state's economy.

## 9:30-9:40 a.m. Break

## 9:40-10:55 a.m. Breakout Sessions

### A. Introduction to Data Analytics and Microsoft PowerBI Tools

[Bryan Smith, CPA, CISA, CITP, CPA Crossings, LLC](#)

Excel is the #1 data analysis tool for CPAs. Yet most have never learned the basics of tools that Excel offers to help with data analysis. Those who learned to analyze data using PivotTables also learned there were many weaknesses in PivotTables that resulted in elaborate calculations in order to perform simple tasks. In 2010, after much development and little hype, Microsoft released Power Pivot, a new data analytic tool that removed the weaknesses of PivotTables. This single product took Excel from a low-end data analytic tool to one of the most sophisticated and comprehensive tools. Since then, Microsoft has continued their development of end-user data analytic tools. This entire suite of products is called PowerBI. In this session, we will provide an overview of the various PowerBI tools and discuss Microsoft's PowerBI Strategy. We will begin by explaining the challenges faced by many accountants when it comes to analyzing data in Excel. You will learn how each PowerBI tool reduces the challenges and improves your data analytic skills. You will also gain a complete understanding of when to use which tool.

### B. Pitfalls to Avoid in Employee Relations

[Nathan A. Baker, J.D., Barnes & Thornburg LLP](#)

Labor and Employment Attorney Nathan Baker will discuss some of the most prevalent mistakes and problem areas employers find themselves in - both new and old - and how to avoid these pitfalls. He will also address the latest updates to the DOL, EEOC and NLRB regulations.

### C. A&A Update

[Martin J. Birr, CPA, CIA, CMA, Kelley School of Business](#)

Keeping up with new regulations from FASB continues to get increasingly more difficult. Birr will get you up to speed with the latest FASB issues and what they mean to you, as well as discuss items on the horizon.

## 10:55-11:05 a.m. Networking Break

## 11:05 a.m.-12:20 p.m. Breakout Sessions

### **A. Microsoft PowerBI - Fundamentals of Power Query**

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

*\*This session builds on the Introduction to Data Analytics and Microsoft PowerBI Tools session. However, you do not need to take both sessions.*

Data is not always clean and neat. It comes from various sources such as text files, Excel spreadsheets, databases, report files, etc. This is where most data analysis projects fail - the inability to get the correct data. This class focuses on using Power Query (Get and Transform in Excel 2016) to clean, shape and transform your messy data while still allowing you one click refresh. We will review various data issues including appending files, combining multiple files from a folder, adding custom columns, unpivoting data, creating a lookup table and much more.

### **B. Fresh Views from the Benefits Frontlines**

[Karl Ahlrichs, SPHR, SHRM-SCP, Gregory & Appel Insurance](#)

[Dennis Nash, Gregory & Appel Insurance](#)

It all comes down to money and motivation. Employee benefits is one of the most expensive items on an organization's cash flow statement, and 2017 is shaping up to be a year of great challenge and opportunity. The challenges are because of changes in Washington and the Indiana Statehouse, and the opportunities because there are some new strategies and resources that can provide a competitive advantage.

In this fast-paced presentation, we will:

- Review trends and challenges headed our way, with a brief look at three significant legislative issues that will change our world in benefits.
- Should you be self-insured vs. fully insured? There are new factors that may cause you to revisit the question.
- The pros and cons of Professional Employment Organizations/Employee Leasing as a strategy for handling your benefits and human resources needs.
- One Size Fits One: coming to grips with offering voluntary benefits to a more diverse workforce, from aging issues to millennials to individuals with special needs for insurance of particular types, and doing it with no out-of-pocket costs to the organization.

This will be a fast-paced lecture with handouts, broken down into four short format segments with Q&A. Each of these segments will be covered in sequence, each getting a 15-minute "Ted Talk" type focus, overall providing a fast-paced overview of benefit trends.

### **C. Fraud & Embezzlement: Lessons from the Trenches**

[Bryan Callahan CPA, CFE, CFF, CVA, BKD, LLP](#)

- Review recent fraud trends from the 2016 ACFE Report to the Nation.
- Provide fast-paced real-life examples of internal fraud.
- Discuss how to use cutting edge technologies to catch fraud early or prevent it entirely.

### **12:20-1:00 p.m. Conference Luncheon**

#### **1-2:00 p.m. Lunch Speaker**

#### **The Battle for Talent: Selecting and Retaining Top Performers**

[Sarah Turner, Faurote Group](#)

Master the art of talent attraction, selection, development and retention processes! Discover what it takes to attract, hire and retain top performers by establishing a positive workplace environment for employees to be fully engaged. You will learn about the different types of barriers that exist in a workplace environment, such as generational gaps. You will also learn the definition of Emotional Intelligence (EI) and address the impact and common misconceptions it has on employee retention. This interactive and compelling presentation will allow you a better understanding of the drivers, barriers and implications of the workforce so you're fully prepared to win the battle for talent!

### **2-2:10 p.m. Networking Break**

#### **2:10- 3:10 p.m. Breakout Sessions**

##### **A. Office 365 - Software Applications Lightning Round Review**

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

At last count, there were over 20 unique applications available in the Office 365 bundle. These range from the traditional Office desktop applications such as Excel, PowerPoint, Word, etc., to a whole new generation of cloud-based applications such as OneDrive, SharePoint, Yammer, Delve and more. These newer cloud-based applications will help you transform to a digital business model. This course will provide a review of all the Office 365 applications available so you will understand where they fit into your overall strategy to create digital business processes and collaborate via the cloud. This will also provide you with the appropriate knowledge necessary to determine which subscription plans are appropriate for your team members.

##### **B. Leadership Progression - Doer to Delegator to Developer of Others**

*Sarah Turner, Faurote Group*

In the battle to outperform the competition and be successful, we must recognize the importance of creating leaders at all levels. Since more than 95 percent of leadership

does not come from the top but rather throughout the middle of an organization, our belief is that leadership is based on the person - not the position. Therefore, the question every leader must be able to answer is, "Why should someone follow me?" This program identifies what it takes to be a successful leader and discusses the keys to getting people to want to follow you, allowing you to transition from a doer, to a delegator, and eventually, a developer of leaders.

### **C. Federal Tax Update**

[Jenny Ray, CPA, Somerset CPAs, P.C.](#)

Join Ray as she speaks about the changing political climate with respect to the 2017 tax year, including topics on President Trump's tax reform and changes to the Affordable Care Act, among other standard update topics.

### **3:10-3:20 p.m. Networking Break**

### **3:20-4:30 p.m. Closing General Session**

#### **What All Businesses Should Know about the Internet of Things**

[George A. Gasper, J.D., Ice Miller LLP](#)

[Stephens E. Reynolds, J.D., Ice Miller LLP](#)

The next technological revolution has arrived. The Internet of Things (IoT) is changing the way business is done, and this presentation will help prepare you to navigate the new frontier. IoT - a network of interconnected devices that collect, transmit, analyze and communicate data - presents new legal risks and opportunities across a wide range of industries, from manufacturing to health care to consumer products. It opens up businesses to a world of inter-connected possibilities but also presents unique risks that must be managed. This presentation also will highlight several of the compliance issues and potential solutions associated with IoT, including the regulatory environment, contracting, risk management, privacy, data security, advertising and consumer protection.

### **4:30 p.m. Adjourn**