



2012
Edition

Conference Catalog

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Executive Education, Inc.

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Lively, Informative & Fun!

Indiana CPA Society

Controllers Conference

March 25, 2011

General Sessions

8:30 -9:20 AM

How Good Companies Become Great

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

9:25 – 10:15 AM

Making Ethics Work

Dan Chenoweth, MBA, CPA, Chenoweth & Associates, Loveland, CO

Networking Break: 10:15 – 10:30 AM

Breakout Sessions

10:30 – 12:10

A. Effective Corporate Governance: Working with the Board and Audit Committee

John F. Levy, MBA, CPA, Board Advisory, Westfield, NJ

B. How IFRS Convergence Will Change GAAP as You Know It

John L. Daly, Executive Education, Inc., Chelsea, MI

Conference Luncheon: 12:10 – 1 PM

1:00 – 2:40 PM

A. Change Management: Making Improvement Happen

Dan Chenoweth, Chenoweth & Associates, Loveland, CO

B. Creating the Best Projections You Can

John F. Levy, Board Advisory, Westfield, NJ

Break: 2:40 PM – 2:50 PM

2:50 PM – 4:30 PM

A. Lean Accounting: Doing More With Less

John L. Daly, Executive Education, Inc., Chelsea, MI

B. Creating Competitive Advantage

Dan Chenoweth, Chenoweth & Associates, Loveland, CO

Adjourn: 4:30 PM

We can provide
your entire
conference
program!



Nancy Knows.....

Dear Friends,

Executive Education, Inc. can provide speakers to present current financial management topics for your conference or meeting. We have recently teamed up with CPA Crossings, LLC, a technology seminar provider, to produce an even broader selection of conference topics. Together, we can provide:

- Dozens of different 50 or 100 minute breakout sessions of interest to corporate financial managers
- Multiple sessions presented by the same speaker or multiple speakers
- Breakfast or lunch keynote speakers
- Keynote speaker who can also present breakout sessions on additional topics

With the depth and breadth of experience on our team, we have the capability to provide ALL of the speakers for your Controllers or Industry Conference.

This catalog will tell you about the many topics we can present.

Nancy

Nancy J Daly, **BS, MBA**, is Executive Education's Client Service Manager and is responsible for association needs. You can contact Nancy through any of the following means:

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Conference Speakers



Dan Chenoweth, **MBA, CPA** helps clients take their strategy to the bottom line through rigorous project management and change management techniques. He has held executive level positions in general management, accounting and finance in a number of industries including telecommunications, printing and publishing, heavy equipment manufacturing and apparel manufacturing. Dan lives in Loveland, Colorado and is a former board member of the Colorado Society of CPAs.



John L. Daly, **MBA, CPA, CMA, CPIM**, is a Chelsea, Michigan based management consultant specializing in costing, pricing strategy and pricing model development. He has taught continuing professional education courses since 1995. Earlier in his career, John was Chief Financial Officer for a Tier 1 automotive parts supplier. He also has been CFO for a large restaurant chain and COO for a window treatments manufacturer and retailing chain. He is the author of ***Pricing for Profitability*** published by Wiley & Sons.



Jay Giannantonio, **MBA, CPA, CIA**, is a management consultant specializing in internal audit, risk management, process improvement and Sarbanes-Oxley compliance issues. His professional experience includes long stays at Verizon/Bell Atlantic and KPMG Consulting in a professional career that began in 1980. He is a member of the AICPA's Forensic and Valuation Services (FVS) section. Jay lives in the Philadelphia area.



John H. Higgins, **CPA, CITP** is a founder of CPA Crossings, LLC, a technology education and consulting firm. John has a passion for helping financial professionals achieve success by leveraging technology. He has facilitated hundreds of sessions to develop technology-enhanced solutions. ***The CPA Practice Advisor*** named John one of the 25 thought leaders in the accounting profession. He is the past chairman of the Michigan Association of CPAs and is a member of the AICPA Business and Industry Hall of Fame.



John F. Levy, MBA, CPA, is the CEO of Board Advisory, a consulting firm that assists public companies, or companies aspiring to be public, with corporate governance, compliance, financial reporting and financial strategies. He has served as CFO of both public and private companies. Mr. Levy currently serves on the Board of Directors of four public companies, including as Chairman of one company and lead director of another. He is a graduate of the Wharton School of Business at the University of Pennsylvania.



William F. O'Brien, MBA, CPA, is a financial management consultant and educator with over 40 years of experience. He has held senior financial management positions with Intel and ROLM and served as CFO for several emerging high technology companies. Bill has extensive experience in corporate planning, control, financial analysis, cash management and managerial accounting in both domestic and international settings. He is on the faculties of Santa Clara University and San Jose State University.



Bryan L. Smith, CPA, CITP, CISA is a founder of CPA Crossings, LLC, a technology education and consulting firm. Bryan's expertise includes in-depth knowledge of paperless workflow solutions, the impact of technology on internal controls, strategic IT infrastructure design and information security best practices. Bryan is a member of the AICPA CITP Credential Committee and is Past Chair of the Michigan Association of CPAs Information Technology Committee



Diane D. White, MBA, CPA, CMA, is a finance and accounting executive with 35 years of control and business leadership expertise in both for-profit and non-profit financial sector entities. She held senior finance and control positions with Freddie Mac and Wachovia Corporation and served as CFO for financial service trade association, student lending, educational services and IT non-profits. Diane is currently CFO of Workforce Resource, a technology service provider, and lives in Beaufort, SC where she is an enthusiastic boater, published poet and photojournalist.

Conference Topics

Here are **SOME** of the topics our speakers could present at your conference.

Adobe Acrobat for Accountants: Tips & Tricks

John H. Higgins, CPA, CITP, or Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC

Adobe Acrobat is an important tool for anyone who distributes documents electronically. This session will provide a live demonstration of Adobe Acrobat features including how to navigate, organize, review and annotate PDF files. You will learn how to use Acrobat tool bars, create, organize and work with electronic stamps and drawing tools to annotate PDF files, create PDF files from software applications, format PDFs for printing; and create links between documents and secure your documents with encryption.

Apple iPad: What You Need to Know

John H. Higgins, CPA, CITP, or Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC

If you have recently acquired an iPad, this workshop will make all the difference! Learn essential tips for getting the most out of these popular devices. John will guide you through the initial set-up process, helpful hints for using the iPad's on-screen keyboard, how to navigate the device's interface and more. You will also get a preview of how the iPad can improve efficiency in your personal and professional lives. Bring your iPad!

Apple iPad: Doubling the Value of the iPad

John H. Higgins, CPA, CITP, or Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC

Are you using your iPad to its fullest potential? Are you wondering how to complete the tasks you normally do on your PC on your iPad? Come to this session to gain an in-depth knowledge of the iPad features including wireless connections, the App Store, 10 useful business apps, printing using the iPad; peripheral devices, backing up your iPad, and understanding the iPad settings. Bring your iPad to this session!

The Civil Advantage: Workplace Ethics and Civility

Diane D. White, MBA, CPA, CMA, Workforce Resource

People treasure their personal dignity, have amazingly long memories for personal slights, and thrive when treated with respect. Far too many business people still seem to think that rudeness, blustering, and bullying is a path to prestige and power. Today's increasingly diverse and global business environment demands adherence to universal rules for considerate conduct and a civil approach to fostering cooperation. What we call "manners" are behaviors developed over millennia and are proven tools for avoiding destructive acts and for building trust. This session will rapidly acquaint you with 25 rules for considerate conduct both in and out of the workplace.

Cloud Computing

John H. Higgins, CPA, CITP, or Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC

Cloud computing is the fastest growing segment of the accounting technology industry. This course is designed to provide you with a thorough understanding of what cloud computing is all about and how it impacts your IT strategy. This session will provide you with insights into how to integrate cloud computing into your IT strategy effectively. John will also discuss the cloud computing value proposition, application evaluation considerations, and the role of the SAS70 audit report.

The Continuing IFRS Journey: Update on an Uncertain Future

**William F. O'Brien, MBA, CPA, Santa Clara University or
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.**

Conversion from U.S. GAAP to International Financial Reporting Standards (IFRS) is a given reality for public companies and select private companies with public accountability. The key issues involve when it will occur and how to make it happen! This session will discuss possible IFRS adoption scenarios, the key issues concerning financial managers and provide tips for getting prepared now.

Convergence and Private Company Accounting: More Changes on the Financial Reporting Horizon

William F. O'Brien, MBA, CPA, Santa Clara University

In the next few months, accounting in the United States will change forever. While most financial professionals are aware of International Financial Reporting Standards' (IFRS) affect on public companies, many are not sensitive to the potential changes resulting from FASB's convergence project and the affect of proposed accounting standards for non-public companies.

This session focuses on how convergence will affect YOU. You cannot afford to miss this critical, entertaining and interactive session.

Corporate Finance Check-up: Renovate Your Analytical Toolbox

William F. O'Brien, MBA, CPA, Santa Clara University

Understanding corporate finance is a skill that separates those who will become Chief Financial Officers from those who will always remain accountants. This session provides a refresher on corporate finance skills for those who work or aspire to work at the CFO level. This session reviews internal financial analysis skills, takes a fresh look at cash flow analysis and performance measurement techniques.

Creating Competitive Advantage: Developing a Roadmap for Sustainable Performance

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

One of leadership's primary responsibilities is to develop a strategy that defines a unique and valuable position in your marketplace and provides you company a competitive advantage. This is easier said than done! While we would all agree that strategic planning is a critical element for organizational success, strategic planning today is a paradox. On the one hand, we should make detailed strategic plans with a horizon of a decade or more. On the other hand, organizations must be adaptable. What happens when break-through technology, new emerging competitors or global competition change the rules of the game? How well does your company recognize these changes and adapt to determine a new course of action? This session will provide you with the ideas, skills and confidence to be more proactive in developing your organization's strategic plan.

Creating the Best Projections You Can

John F. Levy, MBA, CPA, Board Advisory

All we really know is the past but all that really matters is the future. How can you take the historical knowledge you have about your company, its performance, your competitors, your industry and the economy to help your company plan for the future? In this session, John F. Levy will examine current budgeting and forecasting best practices as well as the critical roles of strategic planning and risk management in developing best projections. He will look at the many uses of projections from cash management to compensation.

Effective Corporate Governance: Working with the Board and Audit Committee

John F. Levy, MBA, CPA, Board Advisory

The relationship between the CFO, the Board of Directors and the Audit Committee has changed forever. The Board, especially the Audit Committee, is looking to the CFO and the finance and accounting department for more – more integrity, more honesty, more information and more strategic analysis. How do you meet these challenges? Your Board and Audit Committee are now better qualified and more independent. How do you tap into the knowledge and experience of your audit committee members? Veteran director and public company CFO John F. Levy will tell you how to communicate effectively with your Board and Audit Committee and how to use them as competitive assets.

Awesome! Let's get him back next year!

- Seattle, WA

Ethics – Information Privacy Regulations Overview

John H. Higgins, CPA, CITP, or Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC

Financial managers must know and comply with a rapidly expanding array of information privacy regulations. This session will provide you with an understanding of information privacy regulations and your obligation to comply with them. Learn how specific regulations may impact you and get the resources to keep yourself up to date!

Ethics in the Real World: Power, Influence and Ethics

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

One of our basic needs as human beings is to feel we are part of a team and have a sense of belonging. In this session, you will learn this basic human need can also work against us. The CEO and other senior executives may exert their power and influence on the Financial Manager for unethical, even fraudulent, purposes in order to “make the numbers.” This session identifies the four sources of leadership power and the six primary ways people in positions of authority can influence the behavior of others. The session concludes with a discussion on how Financial Managers can defend themselves against these influences executives ask us to take unethical actions.

The Ethics of Risk Management

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Taking unreasonable risks with your shareholder’s money is clearly unethical. On the other hand, taking no business risks at all may be an irresponsible use of your company’s resources. Today’s enterprise risk management and internal control standards define what management teams must do to evaluate and manage risks. This session examines the ethical issues of risk management with the goal of keeping your name off the front page of the newspapers.

Excel - Auditing Your Spreadsheets to Ensure Data Integrity

John H. Higgins, CPA, CITP, or Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC

This course will teach you how to use all of the tools and features of Excel 2007/2010 to audit your spreadsheets and protect the integrity of your formulas and data values. Understanding spreadsheet vulnerabilities. Review and see demonstrations of Excel’s formula auditing tools. Use annotations to document your spreadsheet design, and protect your spreadsheets for maximum integrity. Learn how using range names can improve spreadsheet design/control. Regular spreadsheet users will not want to miss this session!

Excel - The Power of Pivot Tables

John H. Higgins, CPA, CITP, or Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC

This presentation will teach you everything you ever wanted to know about creating and using Excel pivot tables for efficient and effective data analysis. Understand what pivot tables are. Learn how to connect pivot tables to external data sources. Learn every aspect of designing, creating, formatting and using pivot tables to analyze data in Excel 2007/2010. You will be a pivot table expert after attending this session!

Financial Analysis in a Metrics Driven World

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

At one time, financial analysis consisted of comparing one financial statement number to another. Today's financial analysis is more sophisticated; often performed at the individual responsibility center level using metrics integrating both financial and non-financial information. This session will cover:

- Why knowing how to measure output is the first step in financial analysis today
- Why information "cleansing" is key to understanding your real situation
- How to tell which business activities are performing or underperforming
- What financial metrics every company should use

Make sure your analysis tools are up to date!

Five Business Books in 100 Minutes

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

You know you should read some business books, but finding time is often hard to do. Come hear popular speaker John L. Daly talk about five business books, including his own. This session makes it easy to catch up with the latest thinking in five different areas of business. The session will discuss ***How the Mighty Fall, Lean Thinking, Crucial Conversations, Small Giants*** and ***Pricing for Profitability***. Save some time and hear John talk about these books!

Fraud Alert! Loss Prevention and Control

**William F. O'Brien, MBA, CPA, Santa Clara University or
Jay Giannantonio, MBA, CPA, CIA, Executive Education, Inc.**

Fraud Alert is one session you cannot afford to miss. Fraud will touch you in some manner. Prepare for the inevitable. A study by the Association of Certified Fraud Examiners estimated fraud costs the economy in excess of \$650 billion per year (the equivalent of \$4,500 per employee). This same study estimated the course of normal audits discovers only about 11% of frauds versus approximately 19% discovered by accident. This session will examine various types of frauds and discuss ways to prevent, detect and investigate these activities.

How Good Companies Become Great

Dan Chenoweth, MBA, CPA, Chenoweth & Associates or
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Some business writers are calling Jim Collins' book **Good to Great** the best business book so far in the 21st Century. Well-researched and widely read, Collins findings dispel many long-held business myths. This session will review Collins' research, compare it to other research and the discuss the implications for management teams that want to make the transition from being merely good to truly great.

Lean Accounting: Doing More With Less

John L Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc. or
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Many accounting departments generate volumes of information that is of little use to anybody. Lean Accounting begins with examining the needs of the user, focusing effort on the aspects of financial management providing real value to the company. Come hear how to improve accounting processes while reducing the amount of effort required.

Ethics in the Real World: Power, Influence & Ethics

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

One of our basic needs as human beings is to feel that we are part of a team and have a sense of belonging. In this session, you will learn that this basic human need can also work against us. Your boss or customers may their power and influence to get their way. The CEO and other senior executives may exert their power and influence on the Financial Manager for unethical, even fraudulent, purposes in order to "make the numbers."

MS Office 2010 – What's New?

John H. Higgins, CPA, CITP, or **Bryan L. Smith, CPA, CITP, CISA, CPA Crossings, LLC**

This course will provide a discussion and demonstration of the latest release of Microsoft Office. The presentation will focus on what is new and different to help you understand how upgrading to this version of one of the most popular business software applications will help you.

Develop an understanding the benefits of upgrading to Microsoft Office 2010. Learn the pros and cons of making the switch.

This session will review the Office 2010 interface including "ribbons", contextual tabs, mini toolbars and galleries and new features in Outlook, Word, Excel, PowerPoint and the increasingly popular One Note application to help you become paperless.

Nonprofit Boards: Stepping Up to Today's Challenges

Diane White, MBA, CPA, CMA, Workforce Resource

The days when nonprofit boards were essentially a benign group of supportive persons are fading. Heightened expectations for corporate governance quality and visibility have changed the composition and emphasis of nonprofit boards nationwide. This session focuses on how to understand, advise and help nonprofit boards meet their critical governance responsibilities. In this session, you will:

- Become acquainted with board responsibilities, needs, and challenges
- Learn about competencies needed on nonprofit boards
- Examine the current state of nonprofits and the implications for board activities
- Find out what board members must know about serving as a board member
- Obtain tips to make nonprofit boards highly effective resources

Performance Analysis: Identifying Profit Improvement Opportunities

William F. O'Brien, MBA, CPA, Santa Clara University or
Jay Giannantonio, MBA, CPA, CIA, Executive Education, Inc.

Discover ways to make your company more profitable! This fast-paced session will teach you how to use operational auditing techniques to identify and implement cost saving operating controls and processes. Based on the principles of COSO's Internal Control Framework and standards of the Institute of Internal Auditors, this session will make the experienced financial manager and the professional operational auditor more efficient and value-added in their respective fields.

Pricing for Profitability: Why Cost Still Matters

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

Three things can happen in pricing, and two of them are bad. Overpriced products are a missed opportunity whereas underpriced products give away your products at a loss. When sales and accounting personnel fail to work together, the company risks becoming its industry's "dumb" competitor. Accountants involved pricing can help the company understand the difference between "dog" and "gravy" opportunities with knowledge that directly translates into an improved bottom line. You will leave this session understanding why the company with the best cost information wins!

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

- Minneapolis, MN

Profit Improvement – Ten Tips

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc. or
Dan Chenoweth, MBA, CPA, Chenoweth & Associates

When a company is having poor financial performance, the financial person is often the first to go. Whether times are good, or times are bad, asking the tough questions and making sure the organization is efficient and stays efficient are part of the financial manager's job. Proactive efforts by financial managers can prevent the need for a company to "catch up." This session provides 10 techniques for improving your company's bottom line.

The Psychology of Change Management

Dan Chenoweth, MBA, CPA,- Chenoweth & Associates or
Diane D. White, MBA, CPA, CMA, Workforce Resource.

Research shows that far too many change initiatives fail to launch properly or endure because their leaders do not understand the psychological basics of human response to change. Inept change management techniques can cause long-lasting damage or unintended consequences for individuals or organizations. If you have ever observed the negative results of participating in a failed change initiative that logically should have been an easy dunk -- or want to avoid an unnecessarily bad experience -- this session may open your eyes to new awareness and tools for effective change leadership.

Risk Analysis and Management

Dan Chenoweth, MBA, CPA, Chenoweth & Associates
William F. O'Brien, MBA, CPA, Santa Clara University

In this turbulent world, responsibility for risk management has fallen squarely on the shoulders of financial managers. Audit committees and external auditors are asking questions that they have never asked before. We had better prepare to give them answers! Come get insights about Enterprise Risk Management (ERM) and what standards such as the COSO ERM model say every company must do.

Resolving Ethical Conflicts

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

At some point in his or her career, every financial manager will face a choice of doing the right thing or taking the easy way out. Skillful handling of an ethical conflict can make a big difference in the trajectory of your career.

This session will discuss:

- Standards and techniques for resolving ethical conflicts
- How to have a conversation about a tough issue and still keep your job
- What to do when talking fails

This session could save your job and your career!

Sharpening the Saw: Why Successful Companies are Learning Organizations

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

In many organizations, the accountant's annual 40 CPE hours represents the most learning for any group of team members. This may mean that the whole company is falling behind its competitors. Today, the greatest compliment that you can pay a company is to say it is a "learning organization." Come hear nationally recognized speaker John L. Daly talk about how to make continuous learning affordable and why your company must be a learning organization.

Take Your Writing to the Next Level: MS Word Can Make You a Better Communicator

**John L Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc. or
Diane D. White, MBA, CPA, CMA, Workforce Resource**

Many accountants write in a boring style featuring passive sentences and low readability scores. Learn how MS Word can provide feedback to improve your writing significantly. This session will also show you how to use the styles features of Word to create a professional "look" and automatically index your documents.

The Trustworthy Leader: Ethics and Trust

Diane D. White, MBA, CPA, CMA, Workforce Resource

Of all the fundamentals of positive, effective leadership, TRUST ranks at the top. People will do nearly anything for a leader they trust and will resist or sabotage a leader they consider untrustworthy. Many business leaders simply assume they are trusted when they actually are not, or think that their authority and power can take the place of trust, or sincerely believe that people should conduct business on a "trust no one" basis. To the contrary, research shows that infusing authentic trust throughout an organization's culture has enormous payback potential in all aspects of doing business. However, how do we gain and lose real trust? This session addresses the most important concepts and tips for building and maintaining trust and integrity in business culture and practices.

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

– Fargo, ND

Great speaker and great topic ideas made time spent very profitable experience.

– Livonia, MI

Other Conference Topics

- Business Performance Management: Metrics-Driven Financial Control
- Cases in Corporate Ethics
- Could You; Should You, Close in One Day?
- Driving Company Growth: Creating a Competitive Advantage
- Effective Business Writing
- Effective Communications for Financial Managers
- Financial Strategies During a Business Downturn
- Google Me This
- Looking for Mr./Ms Right Company: Searching for Merger & Acquisition Candidates
- Managing from Strength
- Money, Money: Selecting, Negotiating and Closing on the Right Financing
- Negotiating with Your Banker and Your Boss
- Nonprofit Grant Writing
- Raising Your Emotional IQ
- Strategic Planning: How Organizations Can Identify and Protect Their Niche
- Strategic Sourcing: Supply Chain Excellence
- Trends in Management Accounting
- Trust and Verify: Conducting Meaningful Due Diligence

Looks great! I wish I could plan all my conferences could this swiftly 😊

– CPA Society CPE Director



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