Keynote Addresses & Conference Breakout Sessions

SEMINAR CATALOG
2022

THE KNOWLEDGE INSTITUTE

What is the New "Normal"?

Dear Friends,

Last year was an unprecedented challenge for conferences. How many times have we heard, "I can't wait for things to go back to normal"? It is natural to reminiscence about the 'good old days,' but the good old days are in the past. You and I live in today's world. I think that whatever normal is – is changing every day. What was normal yesterday will not be normal today.

There will always be a place for live, in-person conferences **and** a place for live, virtual conferences. There is no going back. Discussion Leaders must know what works for both types of conferences and they are not the same! Speakers must be engaging, educational, informative, interactive, and fun whether the conference is in-person or virtual or hybrid.

We will continue to develop fresh, new material to connect with the participants, so they want more! Our topics are detailed on the following pages. When your conference is a success, we all succeed.

For scheduling and questions please contact Lisa Thornton at Lisa@TheKnowledgeInstitute.com or 704-654-1013, or me at Don@TheKnowledgeInstitute.com or 704-942-0413.

We look forward to working with you again and helping your professionals become even more amazing. Thank you for your support.

Don Minges, Principal

E-Mail: Don@TheKnowledgeInstitute.com
Mobile: 704-942-0413

Hello,

What a great year 2022 is going to be! We have been working diligently to prepare materials that are interesting, informative, and lively, and we are excited to offer the following to our clients:

- Live webinars scheduled exclusively for your members
- Live online conferences
- Our live virtual Friday morning CFO Series
- Regularly scheduled webinars through our partners ACPEN and CPA Crossings
- Pre-recorded webinars in an .mp4 format that you can play on your own schedule

We strive to efficiently find innovative ways to solve your challenges by offering you both live and virtual options that exceed your expectations.

Our team at The Knowledge Institute is here to make your continuing professional education a top-notch experience.

Lisa Thornton
Your Client Service Manager

Email: Lisa@TheKnowledgeInstitute.com
Phone: 704-654-1013

THE KNOWLEDGE INSTITUTE

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★ *Courses marked with a star are brand new, or have significant updates for 2022*

PARTICIPANT FEEDBACK

Fantastic presenter! I appreciated how everything was based on or related to the real world and the Speaker's skill in engaging the audience through a screen.

- Fairbanks, AK

Engagement was off-the-charts, participation never slowed down. Would never have thought that a virtual presentation would keep me interested for 8 hours.

- Columbus, OH

This workshop highlighted most of what I've learned in over twenty years of business, lessons learned the hard way. Wish I took this twenty years earlier!

- Boston, MA

The sessions were interesting and engaging. Even with eight hours of virtual material, speaker remained enthusiastic!

- Oklahoma City, OK

Great CPE – Very interesting – Best CPE taken in a long time.

- Indianapolis, IN

Course materials provide some great ideas/information to address changes and implement an action plan.

- Roseland, NJ

Speaker is knowledgeable and flexible to group's needs and interests.

- Des Moines, IA

See our website for Video Testimonials: www.TheKnowledgeInstitute.com

DISCUSSION LEADERS

Bob Mims, CPA, is a financial consultant and VP Finance for promising enterprises. For 20 years, Robert has worked with numerous startup ventures and nonprofits in the roles of Strategic Planning, Business Modeling, Controller and CFO. His focus is understanding the fundamentals of profitability. Robert worked ten years as a Big Four a Senior Assurance Manager, earning National Instructor of the Year on three occasions. Robert has served on FASB Advisory committees and is based in Memphis, TN.

Brian Maturi, MBA, CA, has over 35 years' financial management experience in the UK and US, including five years with Deloitte Touche and over 20 years with BorgWarner, Inc. where he was a divisional VP-Finance and Corporate Director of Risk Management. His favorite topics include ERM, management accounting and currency, commodity and interest rate hedging. Brian holds a bachelor's in Economics, an MBA and is an English Institute of Chartered Accountants fellow.

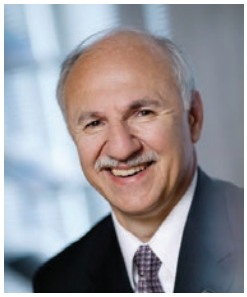
Bryan L. Smith, CPA, CITP, CISA, serves as a virtual CIO to CPA firms and professional organizations. He specializes in the planning and deployment of effective technology solutions. As co-founder of CPA Crossings, Bryan focuses on helping firm leaders understand the issues and opportunities associated with deploying information technology to improve productivity, enhance client services and increase profitability.

Dana Johnson, PhD, CPA, CMA, and several ASQ certifications, has over thirty years of experience with a variety of industries (primarily the automotive industry) as a management consultant and educator for Fortune 100 companies and many SMEs. She is an adjunct professor for Michigan Tech and owns Johnson Professional Services LLC. Johnson has been a keynote speaker, frequent presenter at conferences and is well published in many journals. Her business is based in Minneapolis, MN.

DISCUSSION LEADERS (continued)

Don Minges, MBA, is a fractional CFO who works in diverse industries at various stages. His expertise is in profitability enhancement, strategic planning, venture capital, mergers & acquisitions, consulting, turnarounds, economic forecasting, cost accounting and financial analysis. Don has experience raising equity and has invested equity into promising businesses. He has served on the Board of Directors for several firms. Don graduated with highest honors from the Fuqua School of Business at Duke. Don's mission is to increase the value of the business.

Donna Sylver, MBA, CPA, has held CFO roles and various other financial leadership positions during her 25+ year career. Her broad range of industry experience consists of manufacturing, banking, consulting, healthcare, software, hazardous waste, and communications. Named one of the *25 Most Powerful Women in Banking* by U.S. Banker in 2005, Sylver is currently the Managing Partner for Sylver CPA, PLLC.



Gary Cokins, MBA, CPIM, is an internationally recognized author and speaker. He spent 30 years working with the consulting practices of Deloitte, KPMG, EDS and SAS. Gary has a BS in Industrial Engineering from Cornell University and an MBA from Northwestern University's Kellogg School of Management. His most recent books are *Performance Management: Integrating Strategy Execution, Methodologies, Risk, and Analytics* and *Predictive Business Analytics* published by Wiley and Sons.

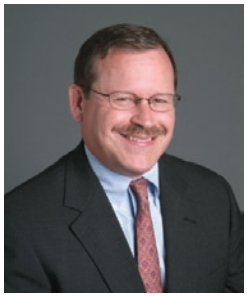
John H. Higgins, CPA, CITP, is the co-founder of CPA Crossings, LLC. John serves as a strategic technology advisor to CPAs in the planning and deployment of effective technology solutions and workflow automation. In 2015, John established CPA Crossings' new *Cloud Accounting Learning Center*, a knowledge-base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

DISCUSSION LEADERS (continued)

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 nine years' experience with three large, national public accounting firms and has served as CFO of both public and private companies. John currently serves on the boards of three public companies, serving as vice chairman of one company and audit committee chair of another. He graduated from the University of Pennsylvania's Wharton School of Business.

Paul R. Harrison, MBA, CPA, CFP® is a veteran financial professional with industry experience in securities, financial planning, and software. Today, he teaches accounting at the University of Denver and has a CPA practice focusing on financial accounting, tax, fraud prevention and ethical management. Paul has an MBA from the University of Colorado and lives in Denver.

Richard A. Karwic, MBA, has served as a management consultant for the most recent 10 years, after serving for 15 years as Chief Financial Officer for several diverse businesses in a wide variety of industries. He also served as Vice President of Mergers & Acquisitions for a mid-cap investment banking firm. Richard has worked in over 100 businesses, including divisions of Fortune 1,000 companies such as Stanley – Black & Decker, Parker Hannifin, Pfizer, and Linatex Corporation of America, where he also served on the Board of Directors. Mr. Karwic has been leading seminars since 1999 and has lectured at Western New England College. His business practice is based in Wethersfield, CT.



Robert A. Angell III, MS, CPA, is Senior Lecturer at Brandeis University, President of Angell Ventures and member of Launchpad Venture Group. An experienced CFO and COO with a public accounting background, Rob held senior executive positions at several high growth public and privately-owned companies. He started his career at Ernst & Young, leaving there as a Senior Manager. A graduate of Brown University, Rob earned his MS in accounting from NYU's Stern School of Business.

DISCUSSION LEADERS (continued)

Tom Henry, MBA, CPA, has spent over 20 years in several CFO roles and in 2009 was named "CFO of the Year" by the *Tampa Bay Business Journal*. Tom also worked with a regional public accounting firm and with Arthur Andersen. Tom has been making presentations since 1982, including; client events, presentations to business and industry groups, testifying as an expert witness, teaching accounting/finance to executives, and teaching at the State College of Florida. Tom's mission is to help others learn and improve. Tom holds an active Florida CPA license and is based in Sarasota, FL.

Tracy Cooper, CPA is a specialist serving small and mid-size businesses in resolving their accounting, technology, business process, and reporting challenges. She has worked with Price Waterhouse, ALLTEL and other leading firms. Tracy's ability to communicate at both the strategic and tactical levels has given her the privilege of leading training with individuals and groups of all sizes throughout her career, both in the US and abroad. Tracy graduated from The University of Texas San Antonio summa cum laude, and is currently based in Little Rock, Arkansas.

Where Are We From?

Our Dicusssion Leaders are located in ten states: Arkansas, Colorado, Connecticut, Florida, Massachusetts, Michigan, Minnesota, New Jersey, North Carolina, and Tennessee.

DISCUSSION LEADERS (continued)

Our Trusted Partner - Executive Education Inc.

If you want a terrific speaker, please consider John Daly, founder of Executive Education Inc.

John L. Daly, MBA, CPA, CMA, CPIM, has been a professional speaker since 1995. He seeks to make every session lively, informative and fun using a combination of case discussion, lecture and peer-to-peer interaction. John has presented in 46 states and 5 provinces on topics that include Accounting, Finance, Management, Software and Ethics. He began presenting ethics two weeks before the Enron scandal broke. John has been CFO for a Tier 1 automotive parts supplier and a large restaurant chain and COO for a window treatments manufacturer and retailer. He is the author of *Pricing for Profitability*, published by Wiley & Sons, as well as numerous professional articles.

To schedule John Daly, contact Barb Sullivan at 734-475-0600 or Barb@ExecutiveEducationInc.com

ACCOUNTING, AUDITING, FINANCE & ECONOMICS

Accounting Fast and Slow: Thinking About Analysis

Accounting

John F. Levy, MBA, CPA, Board Advisory

Do we really understand why we, and our companies, make the decisions? We may believe that we make decisions only after acquiring all the facts, carefully considering all the alternatives and logically choosing the best option. However, Nobel prize-winner in Economics Daniel Kahneman and his long-time collaborator Amos Tversky have proven in numerous experiments and studies that we make most decisions by intuition and not analysis. We will examine Kahneman and Tversky's groundbreaking work and its implications on us, our companies and the accounting profession.

Accounts Receivable and Payable: Effective Management Techniques

Accounting

Richard Karwic, MBA, The Knowledge Institute, LLC

The new flexible, agile accounting/finance department would be wise to review accounts receivable and payable processes. Automation has brought efficiencies, risks, and opportunities to capitalize on long time relationships and build on new ones. When was the last time you reviewed these processes and thought about ways to add value to your organization?

Advanced Capital Budgeting: Budgets That Support Effective Decisions

Finance

Dana M. Johnson, PhD., CPA, CGMA, Johnson Professional Services LLC

Since we operate in a dynamic, ever-changing market, why do we typically use static capital budgeting models? Traditional, static models are not enough. An integrated capital budgeting approach will result in greater overall returns and stronger impact to the bottom line.

Advanced Cost Accounting: Assigning Overhead

Accounting

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

Organizations that use primitive costing methods make predictable mistakes, allocating too much cost to easy, high-volume "gravy" products and too little cost to difficult, low volume "dog" products. This puts the organization with inferior information at a significant disadvantage against a competitor who has a better cost model. The secret to having a great cost model is learning how to deal with overhead.

> ***This was very informative. Absolutely fantastic. I would love to see John Daly back again next year.***
>
> - Bloomington, MN

This session will show you how to assign 16 key categories of overhead. Whether you work in a wholesale, retail, health care, service or manufacturing business. Get your costing right and you will be able to give the "dogs" to your competitors and keep the "gravy" for yourself.

Advanced Planning: Balance Sheet and Cash Flow Projections

Accounting

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

Unless you expect your organization to be stable in the short, medium and long term, you need to understand how to create long-term balance sheet and cash flow projections. Growing organizations must know whether they will have the resources to execute their business plan. Struggling organizations need to know if they will have the cash to survive. This session will increase your organization's ability to see its future and increase the confidence that your CEO, Board and bank have in you.

Balance Sheet Management: The Least Understood Risks?

Accounting

Don Minges, MBA, The Knowledge Institute, LLC

Most organizations manage their income statement, but many virtually ignore the balance sheet until balance sheet problems create seemingly insurmountable emergencies. This session discusses how to analyze and manage your financial statements more holistically, allowing you to identify and correct balance sheet issues early. How do you choose whether to raise debt or equity? What are the key considerations and the advantages of each? What is the cost of capital? What are the 'hidden' balance sheet risks? We will also examine several crucial ideas you can incorporate into your analyses to enhance performance and reduce risk. If you want to enhance your corporate finance skills, this session is for you.

Becoming a Great Predictor: Create Better Forecasts

Accounting

John F. Levy, MBA, CPA, Board Advisory

Imagine being able to see into the future with confidence. The ability to be a great forecaster is not innate but learned. By examining great forecasters, we can learn to improve our ability to predict the future. We will examine best practices and current research to improve our ability to predict events that will affect our business.

Beyond Traditional Budgeting: Reduce Work and Improve Control

Accounting

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

Many financial managers wage a constant struggle to keep their projections current and keep their operating managers engaged and focused on their budgets. This session will show you how to use performance metrics to reduce forecasting work and improve financial control and manager engagement in their department's numbers.

Black Swans: Prepare for the Unexpected

Auditing

John F. Levy, MBA, CPA, Board Advisory

Did you ever hear the phrase, "What you don't know can't hurt you"? Nassim Nicholas Taleb, in his book *The Black Swan*, postulates that it is exactly what we don't know that can hurt us the most. The risks we need to be most concerned about are the risks we cannot identify or predict. Taleb calls these risks "Black Swans." This session will discuss some historical black swan events and, more importantly, discuss how financial professionals and their organizations can prepare for a future we cannot even envision.

Build Your Personal Net Worth

Finance

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

By the nature of our work and training, financial professionals are more sophisticated than the general population about their own personal finances. However, sometimes we spend so much time planning our company's future that we neglect or defer taking steps to build our own personal net worth. If you are dissatisfied with the speed that you are accumulating savings, this session will help put you on the right track. Even if you are meeting your goals, this session will provide insights and ideas that will add to and reinforce what you may already be doing.

Cash Conversion Cycle: Tools & Techniques

Finance

Paul R. Harrison, MBA, CPA, CFP®

How well do you understand your company's cash flows? Good cash management techniques can provide a competitive advantage! This session will show you how to effectively measure and manage your cash conversion cycle. With a more complete understanding of how cash flows through your organization, you can eliminate impediments. Better cash management lowers your borrowing costs, reduces financing needs and creates financial flexibility in your company.

The CFO's Role in Enterprise Risk Management

Auditing

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

Corporate risk management is under increasing scrutiny from auditors, regulators, and shareholders. Properly managed, an organizations risk management process embraces opportunity and avoids hazards. When risk is improperly managed, the organization's value can plummet and key executives resign in disgrace. While nominal risk management responsibility rests with the board of directors, boards increasingly turn to the CFO to lead risk management efforts. This webcast will help you take a leadership role.

The CFO's Role in Strategic Cash Management

Finance

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

Businesses depend on having adequate capital and cash flow. While someone else may handle day-to-day cash management procedures, the CFO must take the lead in strategic cash management decisions. Those who can't manage cash strategically are often replaced when a company goes into a growth mode. Attend this webcast to gain insights that will allow you to function at the highest level.

Closing Best Practices: Shorten Month-End

Accounting

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

Surveys show that the average North American company completes its monthly financial statement closing in five days. However, some companies are able to close their books in one day or less. Many financial managers who feel pressured to shorten financial statement preparation time struggle with the balance between accuracy and speed. This session will focus on how to provide financial information faster, better and more cheaply.

Communicating Financial Information to Non-Accountants

Accounting

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

Do you ever get blank looks when you present your company's financial statements? Does your board nod knowingly during your presentation, but never seems to have any meaningful questions? It could be that they have no idea what you are talking about and are just pretending to understand! Learn how to connect with your CEO, board, fellow managers and team members so they understand your message. Come hear a veteran CFO tell you how.

Commodity and Interest Rate Risks: Manage the Unmanageable

Finance

Don Minges, MBA, The Knowledge Institute, LLC

Risk is everywhere; volatile interest rates, commodity prices, and markets. The best business leaders excel at mitigating risks, but some risks can't be tamed while others can be. How did this happen? Why is market risk increasing and happening more frequently – despite governmental regulations? What can we do to better manage interest rate risk and commodity price changes? We review why market risks are so damaging, and what we can do about them today. If risk is an issue – this session is for you!

Controlling Management Continuity Risk: Ready for the Next Change in Leadership?

★ NEW ★

Auditing

Dan Chenoweth, MBA, CPA and Don Minges, MBA, The Knowledge Institute, LLC

Excellent presentation.
- Detroit, MI

Does your organization risk operational disruption due to a key personnel loss? Are your internalauditors and risk management personnel routinely assessing your exposure to losing key skills and talent? Is your Auditor satisfactorily assessing succession and planning risks? What will happen when the next leader takes over? The math is straightforward, the sixty-year-old leader will leave the organization and today's thirty-year-old will be on tomorrow's leadership team. What does the younger generation want? What can we do today to protect our business and value? Are our people engaged? Procrastination is not a sound strategy. Leadership will change. Learn how to analyze the risks and prepare in advance, so the organization will be properly positioned. This session could help your organization prevent its next crisis.

Corporate Finance Check-up: Renovate Your Analytical Toolbox

Finance

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

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 and takes a fresh look at performance measurement techniques. We will also discuss how to use forecasts as a valuation tool and how to build proactive banking relationships.

Corporate Finance: Valuing a Business

Finance

Don Minges, MBA, The Knowledge Institute, LLC
William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

The section on business valuations presented by Don was a very good section.
- Carmel, IN

This session discusses various business valuation methods whether for a start-up, spin-off or acquisition at any stage. Many valuation methods exist. Which method is right? Which is the 'best' for a given business? Program content includes crucial topics such as: the absolute single best metric, the Cost of Capital, the capital asset pricing model and Weighted Average Cost of Capital (WACC), Valuation methodologies (income, asset and market approaches), Discounted Cash Flow (DCF) and many more. CPAs and Corporate Financial Managers can't afford to miss this session.

Corporate Performance Management for Strategy Execution

Accounting

Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC

Interesting subject matter!
- FL

Poor strategy execution frustrates many executives as their organizations struggle with performance improvement, making decisions using intuition in the absence of hard data. Corporate performance management (CPM) seamlessly integrates many techniques including strategy maps and a balanced scorecard. Together they align manager and employee behavior, actions, and priorities using key performance indicators (KPIs) with specific targets to enable accountability.

COSO Update: Changing Risk Management Standards

Auditing

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

COSO provides the accounting profession's definitive risk management standards, which continue to evolve. COSO guidelines provide a strong foundation for assessing and mitigating risk. The latest revisions help organizations design and implement risk management processes, addressing both operational and compliance objectives. Following the guidelines does not guarantee you will never have risks, but it does increase the probability you will anticipate and mitigate risks before they occur. COSO recommends organizations quickly transition their control evaluations, tools and documentation to the latest framework. This session shows you how.

Cost of Capital: What is It and Why Should I Use It?

Finance

Don Minges, MBA, The Knowledge Institute, LLC

Every business needs capital, and capital has a cost. Debt and equity providers demand a return and the combination is the organization's cost of capital. This session discusses how to calculate the cost of capital, how to use it to make superior business decisions every day and some common ways organizations misuse this number.

Who should understand your organization's Cost of Capital? You should! Even if you are not yet the CFO, you need to thoroughly understand the Cost of Capital and its use. Knowing the Cost of Capital allows managers to literally "Get the biggest bang for the buck." If you want to enhance your corporate finance skills, this session is for you.

Creating Great Projections and Budgets

Accounting

John F. Levy, MBA, CPA, Board Advisory

Like going to the dentist or running on a treadmill, we know our organization's budgeting process is good for us even though most of us dread the process. However, if we truly understand why budgeting is so important, it becomes both easier and less terrifying. This session will examine budgeting pitfalls, ways to avoid budget traps look at ways to improve the budgeting process through better measurement and reporting.

> ***The presenters were excellent, and the topics were very relevant for my company/position at this time.***
>
> - Carmel, IN

Crowdfunding: What Every CFO Should Know

Finance

Don Minges, MBA, The Knowledge Institute, LLC

The internet provides several new ways to raise financing. These methods, called crowd funding, allow organizations to raise financing through donations, pre-sales, debt and equity, often from large numbers of people. Crowdfunding is getting easier due to emerging regulations the JOBS act provides. While not appropriate for all organizations, crowdfunding has no shortage of success stories. However, risks, advantages, disadvantages and costs exist. This session provides a crowdfunding overview for finance professionals who want to learn about this financing method, including key considerations for each crowdfunding type.

Debt or Equity - Which Will Your Organization Need Next?

Finance

Don Minges, MBA, The Knowledge Institute, LLC

Your organization needs capital and there are numerous financing alternatives. How do you choose whether to raise debt or equity? What are the key considerations and the advantages of each?

This session will provide real examples and detail the process to decide between debt and equity. Why would one be a better choice today and the other be a better choice tomorrow? If you want to enhance your corporate finance skills, this session is for you.

> ***The discussion leader was outstanding – actually one of the best.***
>
> - Indianapolis, IN

Driver-based Budgeting & Rolling Forecasts for Fast Analysis

Accounting

Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC

The annual budgeting process is often criticized as a fiscal exercise done by the accountants that is obsolete soon after it is published, prone to gamesmanship, cumbersome, not being volume sensitive, and disconnected from the strategy and needed risk mitigation spending. You can resolve these deficiencies using capacity-sensitive driver-based expense projections. Driver-based budgeting allows for quick scenario planning and far easier analysis of a growing organization whose future may look nothing like today. The budget can be periodically refreshed to create rolling financial forecasts extending beyond the fiscal year end. Learn how managerial accounting can become managerial economics.

Driving Performance with Metrics

Accounting

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

Do you struggle to keep budgets current in the face of an ever-changing business climate? Do you recognize that last year's actual spending can be far from what a department's spending ***should*** be? Twenty-first century performance metrics reduce work, reduce politics, provide flexibility and substantially improve the performance management process. This valuable session will show you how to drive organizational performance using these powerful techniques.

Effective Management Accounting

Accounting

Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC

Critics have claimed that traditional managerial accounting is at best useless and at worst dysfunctional and misleading. Most line managers do not trust their management accounting data.

21st Century management accounting develops cost/unit metrics that are useful for budgeting, cost analysis and control. Current methods bring truly accurate fact-based costing visibility, tracing costs and identifying cause-and-effect relationships rather than broadly allocating overhead. This information provides the ability to reveal the true profit margins for products as well as for specific sales channels and customers.

Removing the barriers caused by your current management accounting techniques can provide huge rewards.

Financial Analysis: EVA and the Altman-Z Score

Finance

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
John F. Levy, MBA, CPA, Board Advisory

Do you want to brush up your financial analysis skills? This session focuses on two sophisticated analysis tools – EVA and the Altman-Z Score. EVA is the most accepted financial metric used by boards to evaluate the CEO and management team. Companies commonly use the Altman-Z Score to evaluate credit risk. Understand why these metrics might belong in your analytical toolbox.

Fixing Your Chart of Accounts

Accounting

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

A well-organized chart of accounts supports robust responsibility reporting, makes it easy to answer "what if?" questions and helps eliminate data entry errors. However, many organizations cling to the primitive practices of a half-century ago that impose barriers to developing budgets, holding people accountable, gathering useful data and keeping errors from creeping into financial statements.

Best practices today look little like the examples you may have seen in business school. If you sense that your general ledger could do far more, this session will show you how to fix your problems.

Fraud Alert! Loss Prevention and Control

Auditing

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

Fraud Alert! is one session you cannot afford to miss. Fraud will affect you in some manner; prepare for the inevitable. A study by the Association of Certified Fraud Examiners estimated fraud costs the world economy in excess of $3.5 trillion 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.

Inventory Accounting: GAAP, Software and Variance Recognition Basics

Accounting

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

Need to strengthen your inventory accounting skills? This session will help you get there quickly! The session focuses on the basics: inventory GAAP, inventory software, and methods for dealing with variances. Join inventory accounting veteran John L. Daly for this informative session.

Know Your Cost – Double Your Profit

Accounting

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

Companies with poor cost information make bad decisions about products that are not "average." Poor information causes companies to overprice easy, high-volume "gravy" products and underprice difficult, low volume "dog" products. Regardless of whether your company sells goods or services, learn how to double your profit by giving the dogs to your competitor and keep the gravy for yourself.

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

Making Predictions: Plan for the Future

Accounting

John F. Levy, MBA, CPA, Board Advisory

We all make predictions in our personal and professional lives. We base our decisions to marry, buy a house, launch a new product or hire staff on expectations about the future. In the past few years, research into improving predictions has advanced. We will look at this research and current best practices in forecasting to help us prepare better budgets and projections.

Measuring and Managing Customer Profitability: The Why & How

Accounting

Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC

The only value a company will ever create for its shareholders is the value that comes from customers – current and those acquired in the future. Customers increasingly view suppliers' products and standard service-lines as commodities. To remain competitive, companies must determine how to retain customers longer, grow relationships profitably. They must provide differentiated services to different types of customers. These have varying costs.

Unfortunately most management accounting systems do not report customer profitability. They are restricted to only product and service line profitability reporting. Gain insights into how to shift from being product-centric to being customer-centric. Leveraging business analytics with accurate costs is essential to achieve this result.

Measuring and Reporting on Sustainability

Accounting

John F. Levy, MBA, CPA, Board Advisory

Accountants are ideally suited to measure sustainability efforts because we collect and analyze our organizations' information. Until we can adequately measure sustainability efforts and their returns in terms of time and money, many businesses will not fully embrace sustainability. Accountants should lead efforts to report on sustainability because we have the experience and knowledge to create clear, concise and informative documents. This session reviews the challenges in measuring and reporting sustainability efforts, discusses current best practices and provides thoughts about the future of sustainability measurement and reporting.

Optimizing Working Capital Management: Where Cash Is Always "King"

Finance

Dana M. Johnson, PhD., CPA, CGMA, Johnson Professional Services LLC

Everyone knows that, 'Cash is king.' Strong working capital management enhances growth, profitability and liquidity, while substantially reducing risk. This session discusses proven techniques to manage through the peaks and valleys for longer term stability.

Pricing for Profitability: How Finance Can Save the Bottom Line

Accounting

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 in pricing can help the company understand the difference between "dog" and "gravy" opportunities with knowledge that directly translates into often vastly improved profitability. You will leave this session understanding why the company with the best cost information wins!

Protecting Your Company From Fraud

Auditing

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

Fraud affects almost every company eventually. Insiders perpetrate most fraud, often continuing for years without detection. Most organization's change their systems after detecting a fraud. Why not consider changes now that could prevent a considerable loss. This session will provide insights, which could save your organization a lot of money!

Revenue Recognition and Lease Accounting: Changes Have Arrived!

Accounting

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

FASB has issued new standards for revenue and lease accounting that will go into effect soon. Some companies will have major revenue recognition changes. Two types of leases remain, each with their own unique accounting treatment, but the old operating lease concept has disappeared. This session will help you become prepared for the reporting changes that await you in the near future.

Risk Analysis and Management

Auditing

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

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

The Rittenhouse Rankings: Cut Through Financial Reporting's FOG

Accounting

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

Is that financial report you are reading honest and candid, or are the real facts hidden among carefully chosen "weasel words"? Learn about how the Rittenhouse model measures the integrity of management's disclosures about financial results. Prevent misleading disclosures from fooling you.

Raising Financing

Finance

Don Minges, MBA, The Knowledge Institute, LLC

This session reviews proven methods to raise capital and discusses new methods to raise financing, debt, equity, and alternative financing sources including Crowdfunding. What are the pros, cons, and sources for each type of financing? What do banks require when you borrow? What do equity investors look for when analyzing making an equity investment? What are the fundraising techniques that small enterprises commonly use that established businesses can now use? How do you present the request for capital to increase your chances for success? If you are involved with raising capital, this material is essential.

Systemic Risk: Six Mega-Trends Facing Organizations Today

Auditing

Richard Karwic, MBA, The Knowledge Institute, LLC

Worldwide trends can impact our business. In general, accountants are so detail oriented that we sometimes don't pay attention to the "bigger picture" and don't see the impact emerging business models, innovative technologies or global competition have on our organizations. This session discusses six mega-trends and how they can create both hazards and opportunities for your company

Use Performance Metrics: Improve Planning and Control

Accounting

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

Many financial managers wage a constant struggle to keep their projections current and their operating managers engaged and focused on their budgets. This session will show you how to use performance metrics to reduce forecasting work, improve financial control and manager engagement in their department's numbers. This session will help you answer some of the following questions:

- How do you know what your metrics should be?
- What is the best way to measure activity output?
- Why should financial planning begin with benchmarking your metrics?

Join financial management veteran John L. Daly for this helpful session.

ETHICS

Business Ethics Don't Exist: The Only Ethics Rule You Need to Know

Behavioral Ethics

John F. Levy, MBA, CPA, Board Advisory

Most ethics courses focus on unethical individuals and their terrible misdeeds. We don't need another course on lessons from Enron or individuals committing fraud. Most unethical failures result from unethical individuals. Instead, this session will focus on how good people can do better, why there is no such thing as business ethics and why we only need one rule to lead ethical lives.

Business Ethics: Cases from the Real World

Behavioral Ethics

Don Minges, MBA, The Knowledge Institute, LLC

Ethics is not something that is 'nice' to have – it is mandatory for success, for keeping your job and your reputation intact. What are the four (4) ethical priorities of a CPA? How should I resolve conflicts? This session explains how ethics matter and examines some real-world examples when our fellow professionals have been put to the test.

Cases in Corporate Ethics: Real Life Dilemmas

Regulatory Ethics

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

Anyone who has ever attended a lecture-format ethics session knows there is a better way. This session examines real world ethical dilemmas that others have encountered. Sometimes professionals handle their situations skillfully; sometimes they are left wondering "what happened?" long after the fact. Get prepared before something happens to you. Once you have taken a case-based ethics session, you will never want anyone to listen to someone just read you the rules ever again.

The Civil Advantage: Workplace Ethics and Civility

Behavioral Ethics

John F. Levy, MBA, CPA, Board Advisory

Ethics and civility are powerfully connected. What we call "manners" are behaviors with proven value as leadership tools to avoid destructive acts and build trust. People treasure their personal dignity, have amazingly long memories for personal slights and thrive when treated with respect. Rudeness, blustering, and bullying may win the occasional battle, but will always lose the war when it comes to lasting prestige and power. Moreover, ethical lapses are more likely if leaders do not use a civil approach to foster cooperation. This session explains how civility and ethics reinforce one another and offers 25 rules to foster considerate conduct in the workplace.

Devious Ethics: Dealing with Snakes in Suits

Behavioral Ethics

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

Good people believe everyone else is just like them. We cannot imagine someone could con us or our company and have no guilt or remorse. Lack of guilt and empathy are key traits of a psychopath. Experts estimate one out of 25 executives is a psychopath and may initially appear to be more normal than the rest of us. Psychopaths may present a convincing picture of virtue while helping themselves to money, status and sex, leaving a path of shattered expectations, empty wallets, and broken hearts in their wake. Learn how to recognize and deal with others who have no conscience.

> ***Interesting topic and discussion leader did a great job facilitating discussion.***
>
> - Indianapolis, IN

Ethics in the Real World: Living Values for Today

Behavioral Ethics

Richard A. Karwic, MBA, and Dan Chenoweth, MBA, CPA, The Knowledge Institute, LLC

Business ethics is not something "nice to do" but can mean the difference between success, failure and survival in today's competitive environment. Being trustworthy, having consistent business principles and an outstanding reputation may provide an organization's only long-term competitive advantage. This seminar outlines eight steps to create an ethical business environment including specific ways for financial professionals to make better ethical decisions.

Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations

Behavioral Ethics

John F. Levy, MBA, CPA, Board Advisory

Leaders provide the culture, environment, values and incentives that foster and encourage change. Most importantly, great leaders create environments of trust that allow employees to challenge, innovate and work as teams. In a rapidly changing world, heartfelt leaders build great organizations. Understand the qualities of a great leader and find out how you can become a great and heartfelt leader no matter your title or place in an organization.

Resolving Ethical Conflicts

Regulatory Ethics

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

At some point in his or her career, every financial manager will face the choice of doing the right thing or taking the easy way out. Skillful handling of an ethical conflict can make a big difference in your career's trajectory. This session discusses standards and techniques for resolving ethical conflicts, how to have a conversation about a tough issue and still keep your job and what to do when talking fails. This session could save your job and your career!

Excellent targeted ethics course that is very practical. Very enjoyable presentation, and John is an excellent presenter who is able to engage the audience.

- Vancouver, BC

BUSINESS MANAGEMENT & ORGANIZATION

#1 Mistake Managers Make?

★ NEW ★

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

What is the most common management mistake? Why is it so damaging and prevalent? Learn how managers mis-manage the most important assets in the business – our employees. More importantly, what we can we do to get the most out of our people and correct the single most common mistake made in business. The performance review process is broken, and we will discuss how to correct it.

5 Marvelous Business Books in 100 Minutes

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

You work hard - but finding the time to keep up with the latest business insights is a challenge. We have solved your problem! This session makes it easy to catch up with the latest thinking in five very different topics. This seminar will review: *The End of Accounting, The Right and Wrong Stuff: How Brilliant Careers Are Made and Unmade, Big Potential, Pitch Anything* and *Give and Take: Why Helping Others Drives Our Success*. Save time, learn the key lessons of five insightful business books in just 100 minutes. Whether you are a CFO, an experienced mid-level leader or new in your career, talented professionals who want to succeed will benefit from these insights.

8 Attributes of Successful People

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

What makes someone successful? What do they do differently? The answer is - a lot. Successful people have a plan that we all can follow. This session will review the steps and actions successful people take and how we all can become more successful! If you want to succeed and hate to fail, this session is for you.

Accounting Reimagined: The Future of Our Profession

Business Management & Organization

John F. Levy, MBA, CPA, Board Advisory

In a world of too much constantly changing information, the challenge for financial professionals is how to provide the right amount of information at the right time and in the right way. How can we create truly innovative finance departments? Learn a few simple steps you can take now to create a 21st century finance department, which will add true value to your company.

Achieving Strategic Success: Your Personal P-I-T Crew

Business Management & Organization

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

Turning strategic goals into reality is as easy as 1-2-3. Learn about the three tools that can turn aspirations into achievement: Strategic Planning (P-Planning), Performance Based Management (I-Initiation) and Balanced Scorecard Reporting (T-Tracking). Discuss how to use these tools effectively as you race to achieve strategic success. This session will be useful for both financial managers in industry and public practice; the P-I-T Crew can make your department a winning team in either environment. Leave this interactive and entertaining session with the insight for transforming your financial team into your company's catalyst for strategic success.

Better Meetings: Make Meetings Fun & Productive

★ NEW ★

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Most meetings are a snooze-fest; they waste time and prevent you from getting work done. Why do some businesses have productive meetings and others do not? Do we really need to have a meeting? What are the alternatives? This session discusses many proven tactics to make your meetings highly productive. The techniques can help you and your organization, whether you are in the C-suite or starting your career. Learn how to lead meetings that are productive and fun. Your whole department could use this course!

Big Four Reasons Why CPAs are Fired

★ NEW ★

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Why do clients fire CPAs frequently? Client turnover, or churn, damages relationships, reputations and economics. What lessons can we all learn from the everyday mistakes made by seemingly savvy CPAs? What are the four reasons why CPAs are replaced? We will discuss the action steps to take to improve client satisfaction today. Additionally, these lessons are applicable for every business leader, not simply for CPAs. The four reasons why CPAs are replaced are not merely something "nice to do" but can mean the difference between success, failure and survival in today's competitive environment. If you want to improve the business and professional relationships, this session will open your eyes.

Business Lessons from the Dance Floor: Leadership Secrets from Fred and Ginger

Business Management

Don Minges, MBA, The Knowledge Institute, LLC

All of us can improve our leadership skills. This session discusses timeless leadership lessons learned from an unusual place - the dance floor. The parallels between business and dancing are striking; you need good partners, you must cooperate, someone must lead, someone must follow, you need to practice, you may step on someone else's toes, and the leader does not have to be attractive. This session examines what made Fred Astaire and Ginger Rogers, two of the most famous dancers in the world, so successful. These leadership lessons from the dance floor can help you be a more effective leader. Learn many timeless leadership lessons that successful businesses employ every day.

The Business Secrets of Trappist Monks

Business Management

Don Minges, MBA, The Knowledge Institute, LLC

"The Business Secrets of the Trappist Monks," by August Turak, has been an unconventional business best seller. What makes the Trappist Monks successful? The short answer is the monks discovered an amazing secret: "It is in our own self-interest to forget our self-interest." Just like every business, a Trappist monastery must be self-sufficient. Trappists are world famous for many products, from cheese to wool to, most famously, beer. If they do not sell their goods, they do not eat. The Trappists have learned the hard way many lessons that are effective for every business; honing their business skills for 350 years. We discuss key lessons applicable to any business.

The CFO's Role in Compensation and Bonus Plans

Business Management

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

For many organizations, compensation is the single most important cost category. This webcast will discuss why the CFO must involve themselves with compensation and benefit plan design and administration. This session will pay particular attention to bonus plans, covering plan design, administration and common plan features currently in use today.

The CFO's Role in Developing Competitive Advantage

Business Management

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

Boards are increasingly looking to CFOs to participate in, if not drive, corporate strategy. Most financial professionals can identify a strategy that provides a competitive advantage when they see one, but may not know where to look for it. In this session, veteran CFO John L. Daly will lead you through the strategy development process and show you how to turn your organization's search for competitive advantage into reality.

Change – Embrace and Enjoy, Because Change is Coming!

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

We see change every day, so we ignore change as a key risk. Even though change is natural, it is also natural for humans to fight change. Why do humans think we can control everything? Learn more about how we can become better at recognizing change and how we can embrace and adapt to the many changes we will see soon. Change is inevitable. We can adapt to change or be replaced. We discuss practical insights that will help you be even more successful in the office and in life. Effective leaders should not miss this course.

Critical Thinking for Financial Professionals

Business Management & Organization

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

What were they thinking? Why do business leaders sometimes make horrible decisions that severely damage themselves and their organizations? It is tempting to assume that a poor choice must be due to a leader's incompetence, inexperience, bad character, or low intelligence – but such easily attributed factors generally aren't the true cause when leaders blunder. In such situations, many turn to finance and accounting professionals for evaluation, answers, remedies, and solutions for improved future decision-making.

Constant Change: How the Rate of Change is Accelerating & What Can Be Done?

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Change is inevitable and unpredictable, and change comes to our world, e.g., new revenue recognition, taxes and lease accounting. We analyze how much change has occurred in accounting, in finance, and the world we live in. Quantitative analysis proves that the rate of change is accelerating. The future will be different, so it will pay to be prepared.

Creating Equity Compensation Plans

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

In today's business world, there is a talent war and organizations with the best talent will win. We clearly need to motivate talented personnel. Equity compensation plans are useful to retain, reward and recruit. Whether your business is large or small, developing an effective equity compensation plan is a challenge. Most companies that implements an equity compensation plan changes it soon afterwards because it did not function as intended, upsetting the most valuable employees, and failing to achieve the intended result. This session will discuss the numerous plan considerations to help you retain the key personnel who will lead your business to continued success.

Dealing with Problem Employees: What Works?

★ NEW ★

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

A team member is not performing satisfactorily. Corrective actions have not worked. We must dig to determine the root causes. We will review a 15-step process to assess all the reasons why they are not performing, so you can reduce and hopefully eliminate performance issues. Proper planning is essential. If none of the suggestions work, we will review how to part ways. The sooner you address the issues, the sooner the situation can improve. If you have had one employee problem, this session is for you!

Delivering Bad News? Don't Be the Messenger Who Gets Shot!

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

The average CFO's tenure is about three years, while the tenure for other financial positions may not be much better. One cause may be our responsibility to deliver BAD news. Sadly, sometimes the messenger gets shot. How can some people deliver the bad news and actually strengthen their position, while others find themselves without a job?

Many financial professionals believe that, "I just need to know the numbers really well to keep my job." Every day proves this fallacy wrong. How you say it - is often more important than what you say. This session will teach you proven techniques to deliver bad news so that you actually strengthen your relationship with your CEO, Board, bank and management team.

Doing More With Less

Business Management & Organization

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

Do you have too much to do and not enough time to do it? Running efficient accounting and finance functions is not rocket science, but it does require that you get the simple things right. This session covers issues that you may not have thought about but can deeply affect your financial department's operations.

Effective Networking: Energize Your Career

Business Management & Organization

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

It is not who you know, but who knows you. You land jobs, win clients, make sales and get promotions based on your visibility within your company, industry and business community. According to several studies, people find 70-75% of all new jobs through networking. Despite knowing we should network, the prospect of talking to others in a room full of total strangers or making new phone contacts may terrify us. This session will help you get the courage to network by preparing you for that phone contact or networking event. We will talk about what to say, how to say it and why you will do your most effective networking when you listen a lot more than you talk. The skills from this session can put you on the path to networking like an expert.

Emotional Intelligence: The Critical Factor in Executive Success

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Emotional intelligence is an individual's capacity to understand both their own and other people's emotions, and to react to these feelings in an appropriate manner. Research proves that Emotional Intelligence (EI) is a compelling predictor of personal, professional and social success. Every business leader can improve their emotional intelligence, including you. Many businesses utilize EI for promotions and in hiring. This session will discuss the twelve keys to EI and proven tactics to help every aspiring leader "work smart."

Finance and Innovation: Reinvent Your Department and Your Company

Business Management & Organization

John F. Levy, MBA, CPA, Board Advisory

How can so many great companies lose their way and fall into a steep decline or even disappear? Once very successful and profitable companies are now a ghost of their former glory or names we can barely remember. This explores how companies succeed through innovation and fail because they are unable to deal with the next wave of innovation. More importantly, we will discuss how you, your department and your organization can profit from being more innovative.

Financial Management: 10 Tips for Success, 13 Signs of Failure

Business Management & Organization

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC
John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Today's effective financial leader must establish on-going credibility and adaptability to be effective. Finance professionals operate in a landscape of constant flux, yet financial management's fundamental success skills do not vary. Hear a veteran financial executive discuss why some financial managers succeed while others fail.

The Five Dysfunctions of a Team

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

What are the issues and symptoms of poor performing teams? How do we correct the root causes and what can we do to improve performance? This session discusses *The Five Dysfunctions of a Team* by Patrick Lencioni and will allow you to recognize when a workgroup is not living up to its full potential.

Generations at Work: Finding Common Ground

Business Management & Organization

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

The dynamics of today's workforce ARE changing. Gone are the days when managers spent years working their way up the company's ladder. Because of the relatively small population of Generation Xers, leadership is transitioning many management positions from Baby Boomers to Millennials. The result is a greater age difference between colleagues.

This session explores the differences between the generations who make up the current workforce and the implications, both positive and negative, of the gap. We will explain why finding common ground is crucial to survival, and how to accomplish it. Receive practical tips and tricks to manage multiple generations in our work places.

How to Fix What is Broken? The Two Keys to Fix Most Broken Systems

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

The system failed; it does not work. Too often we have to work in an environment where one or more of the systems fail. The system does not deliver as promised. Processes that used to work – suddenly blow up. We all must endure systems that fail, in some measure, daily. We will discuss the two key causes why most business systems crash. (Most, but not all.) There are several steps to plan for which will drastically reduce system risk. Why do we unintentionally design systems that are doomed to fail? This session outlines eight steps to reduce and hopefully eliminate system risks. Proper planning is essential. If you are a 'Fix-it" person, then this session is for you!

Improve Teamwork

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Teamwork is something that every leader wants, but not necessarily something that comes easily. Learn how to set and communicate goals that motivate your team. Find out how to get members to work for the greater good rather than their own personal goals. Seamlessly manage both the team and its individual members. Popular speaker Don Minges tells how you can get your team working toward the same goals.

Introvert Power: Why Quiet Leaders are So Successful

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Leaders were once chosen for their character but today we live in an age where loudmouthed extroverts seem to take center stage in everything, including business, politics and entertainment. While the talkative, charismatic leader makes the front page of business magazines, recent research shows that successful business leaders tend to be more reserved, pensive and sometimes outright shy. Learn why your desire to spend significant time inside your own head may be your greatest asset.

It's All About Action! Deeds, Not Words, Really Count

Business Management & Organization

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

Talk is cheap! Action moves people better than unfulfilled ideas. Actionable concepts serve as a catalyst for change. This session will assist you in developing actionable messages and achieve buy-in as you implement new processes. Discuss the power of the planning and the impact of the quantity, strategy and tactical trifecta.

Heed the advice of legendary University of Alabama football coach, Paul "Bear" Bryant, and "Cause something to happen."

Leaders Eat Last

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

There are many so-called leaders, but effective leaders are different - their focus is taking care of their team. Trust is essential, because without trust, there can be no teamwork. Trust is like oxygen, when it is gone - we suffocate. This session provides a 15-step action plan to gain commitment from your team members, build trust, hold each person accountable and create results for your organization. What do the most effective leaders do that makes them effective? The best leaders lead, they help, they listen and they serve. We will show you how.

I felt this was a great presentation! The course was fun and engaging with good material.

- Indianapolis, IN

Lean Accounting: Doing More With Less

Business Management & Organization

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

Many accounting departments generate volumes of information that are of little use to anyone. Lean Accounting begins with examining user needs and focusing effort on the financial management activities that provide real value to the organization. Come hear how to improve accounting processes while reducing effort required.

Lessons from the Playing Field: What Sports Can Teach Accountants

Business Management & Organization

John F. Levy, MBA, CPA, Board Advisory

The Duke of Wellington is credited with saying, "The Battle of Waterloo was won on the playing-fields of Eton." From before the 19th Century to today, sports have molded our business and professional leaders. Sports can teach today's accountants about many critical business issues, including strategy, culture, metrics, management, innovation, adversity and sustainability. This session explores lessons we can all use from great, and not so great, moments in sports. Quit feeling guilty about playing those extra nine holes or watching "March Madness"– you are learning important professional skills!

> ***The speakers I felt were extremely effective in getting their points across while capturing my attention.***
>
> - Carmel, IN

Managing People: Conquering the Soft Side of Your Job

Business Management & Organization

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

Financial managers rarely get fired due to lack of GAAP or tax knowledge. They get fired because they fail at the people side of their job. An accountant with good people management skills can rise to CEO, but if you can't manage and develop people, your career scope will be very limited. Attend this session to gain people management insight from C-Suite veteran John L. Daly.

Motivating the Right Way - Get the Most From Your Staff!

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Are you getting the most from your staff? Are you paying top-dollar and still not getting high performance? New research gives us the insights to effectively motivate your people. This session discusses proven people motivation tactics. Many 'old' methods really did not motivate in the past and certainly do not work today. Getting the most from your people requires new, very learnable, leadership techniques. Whether your business is large or a start-up, getting people to move forward as one is a challenge. This session will show you how to create an environment where your talented employees can excel.

Negotiating with Your Banker: Get the Best Deal

Business Management & Organization

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Don Minges, MBA, The Knowledge Institute, LLC

Some CFOs think that your banker's proposal is a "take it or leave it" proposition. We can negotiate banking relationships just as we would with any other vendor. This session will discuss how to tell your organization's story, why you should regularly communicate with multiple banks, and how to put yourself in the strongest possible bargaining position. Issues discussed include loan terms, interest rates, covenants, and owner guarantees. If your organization needs bank financing, this session is for you.

Nonprofit Boards: Working with or Serving on Nonprofit Boards

Business Management & Organization

John F. Levy, MBA, CPA, Board Advisory

> ***The real-world examples are wonderful and extremely helpful. John was very knowledgeable and was a very good presenter.***
>
> - Manchester, NH

The days when nonprofit boards were essentially a benign supportive group 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. 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; and find out what board members must know about serving as a board member

The NOT Not for Profit: Run Your Organization like a Business

Business Management & Organization

John F. Levy, MBA, CPA, Board Advisory

Successful not-for-profit organizations run on passion, drive and creativity. However, successful not-for-profits also need to plan properly, allocate resources efficiently and report tangible results to stakeholders. The best not-for-profits use the same business principles that create the most successful companies to achieve their goals. We will examine how your not-for-profit can benefit from key principles that drive the world's most profitable businesses.

Numbers Rule the World, But They Don't Speak the Words

Business Management & Organization

Bob Mims, CPA, The Knowledge Institute, LLC

How can a numbers person master words and communication in an ever-changing and social dynamic? This session will reveal common communication mistakes financial professionals make and suggest practical solutions. We will discuss proven techniques to effectively deliver your numbers so your audience will understand. The numbers do not speak for themselves. We will show you how to tell what the numbers say and speak effectively!

Open Book Management: Making it Work in the Real World

Business Management & Organization

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

Some organizations create extraordinary success by broadly sharing financial information with team members at all levels. Others have tried and failed. This session discusses how real-world organizations have transformed their cultures using open book management. You will gain insight into what works and what does not, learning how giving team members a stake in the action can motivate everyone to create company performance far beyond anyone's expectations.

Optimizing Your Staff's Performance: Creating and Sustaining the Best Team

Business Management & Organization

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

A chain is only as strong as its weakest link. The same theory applies to departmental performance—the overall result is only as strong as its weakest contributor. Leave this interactive and entertaining session with insight for developing and sustaining the best team you can possibly assemble.

The four elements in this process are (1) hiring, (2) development, (3) leadership and (4) environment. Discuss how to effectively use these elements in creating outstanding organization. Discover the power of the 10 Attributes for Leadership Success and the negative impact of Leadership's Fatal 13. Above all, learn how to combine these four elements as a successful catalyst for sustained high-quality output and results.

Prepare for a CFO Role

Business Management & Organization

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

Many accountants spend their early career trying to develop technical skills, yet a surprising proportion of public company Chief Financial Officers don't even have an accounting degree. What does it take to become a CFO and be successful once you get there? Whether you are early or late in your career, this session will provide valuable insights. Come hear stories of a real world CFO's successes and failures.

Pricing Strategies: Find the Right Fit for Your Products

Business Management & Organization

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

A logical pricing strategy exists for every situation, but different situations call for different strategies. While choosing the right strategy does not guarantee success, choosing the wrong strategy usually guarantees failure. Attend this session to gain insights into common pricing strategies and learn where your organization's products belong.

Principled Negotiations: Getting to Yes

Business Management & Organization

John F. Levy, MBA, CPA, Board Advisory

According to negotiation guru Chester Karrass, "In business as in life, you don't get what you deserve, you get what you negotiate." Every transaction between two individuals is a negotiation. Often we view negotiations as a competition with one side "winning" and the other "losing." Principled negotiation is a better method that seeks to have both parties come out ahead. This session will examine best negotiation practices, providing participants with ways to "get to yes" faster and build lasting relationships.

> ***My takeaways were lots of the leadership ideas I learned today.***
>
> - Indianapolis, IN

Profit Improvement: Ten Tips

Business Management & Organization

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Don Minges, MBA, The Knowledge Institute, LLC

When a company experiences poor financial performance, the financial person is often the first to go. Whether times are good or 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 management can prevent the need to "catch up." This session provides 10 techniques for improving your company's bottom line.

Reinventing the Finance Role

Business Management & Organization

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

When everything you must accomplish seems overwhelming, it is often hard to see the big picture. Step back and understand your role as others do. Your board, CEO, peers and the rest of the organization are customers for the information you create. Understanding their perspective will change how you gather, process and distribute information. It will change your focus from dealing with the past to collaborating with others to make the future happen. As a result, you will work more efficiently and will be far more valued. This session will help stimulate your way of thinking about your own position and the department you run.

Selling Your Business: What You Need to Know

Business Management & Organization

John F. Levy, MBA, CPA, Board Advisory

Baby boomer aging has created an unprecedented increase in businesses offered for sale and this number will only continue to grow. In this demanding market, how do sellers get not only the best price but also the right terms and consideration? This session will examine the many reasons to sell, potential buyers, alternative forms of consideration, the structure of transactions, some legal matters and the team needed to maximize the price and protect sellers.

Staff Retention: Attract and Keep the Best People

Business Management & Organization

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

Does it seem like you spend far too much time recruiting? Do your people leave just as they become productive? If you think your turnover is because Millennials are different from earlier generations, you probably are not looking at the real source of your problem. Learn the changes you should make now!

> ***Speakers did a superb job of keeping things interesting!!***
>
> - Indianapolis, IN

Step 1 in Change: Understand Your Culture

Business Management & Organization

John F. Levy, MBA, CPA, Board Advisory

Corporate Culture is the set of rules, values and norms that define an organization's behavior. Culture is at its core, "the way we do things around here." Ultimately, culture determines not only how the organization defines success, but also how the organization accomplishes it. Understanding corporate culture is critical to the ability of any organization to succeed.

Teamwork – Create a Cohesive Team

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Teamwork is the ultimate competitive advantage both because it is so powerful and rare. Why do some teams produce and win, while others fail? What do great team leaders do that make the team a success? Whether you run the executive staff of a multinational company, a small department within a large organization or even if you are a team member in a team that needs improvement, we will share proven techniques to enhance teamwork. It is not complicated to build a team, but it is difficult.

Top Ten Business Myths: Avoid these Errors!

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

> ***Presenters were very good. They were able to hold the group's attention, even in more technical areas of the discussion.***
>
> - Indianapolis, IN

This session discusses ten of the most problematic myths, mistakes, risks, and hidden landmines inherent in every business. We will learn from the mistakes of others who often paid a steep price so that we can learn valuable lessons. If you are a leader who wants your business to become even more successful, this session is for you.

Want That Promotion? We'll Show You How!

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

> ***Great subject***
>
> - Kalamazoo, MI

You have worked hard, very hard, but no promotion. What do you do? We will show you how to discover what is holding you back and then create a plan to improve as desired. Many professionals believe, "All I need for the next promotion is to have the best technical skills." Leadership is more qualitative than quantitative. Whether you are a CFO, an experienced mid-level leader or new in your career, talented professionals who want to succeed cannot afford to miss this course.

Why Do Our Customers Leave? Four Steps to Prevent Churn

Business Management & Organization

Don Minges, MBA, The Knowledge Institute, LLC

Clients fire their consultants and CPAs frequently. Why? Client turnover, or churn, damages relationships, reputations and economics. What lessons can we all learn from the everyday mistakes made by seemingly savvy professionals? What are the four reasons why consultants are replaced? We will discuss the action steps to take to improve client satisfaction today. The four reasons why consultants and CPAs are replaced are not merely something "nice to do" but can mean the difference between success, failure and survival in today's competitive environment. If you want to improve the business and professional relationships, this seminar will open your eyes.

Working with Your Board and Audit Committee

Business Management & Organization

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 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 explain how to communicate effectively with your Board and Audit Committee and how to use them as competitive assets.

> ***Excellent and captivating presenter with tremendous relevant and practical senior management experience.***
>
> - Troy, MI

Understanding Value from the Customer's Perspective

Business Management & Organization

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

When a company has a unique, well-differentiated product, understanding value from the customer's perspective becomes the most important factor in profitable pricing. Yet, many organizations adopt a "value pricing strategy" without having performed the analysis to understand either how much they could get for their products or the minimum acceptable price. This session discusses four techniques for understanding value.

> ***Very dynamic. Kept me engaged during entire presentation. Very relevant examples.***
>
> - Minneapolis, MN

COMMUNICATIONS & MARKETING

Communications Success: Make Your Message Stick

Communications & Marketing

John F. Levy, MBA, CPA, Board Advisory

Great ideas are only great if they are implemented. How can you make your ideas matter to others? Learn the six steps to make your ideas stick. Learn how to use your influence effectively so the message makes a difference!

Performance Analysis: Identifying Profit Improvement Opportunities

Communications & Marketing

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

Discover ways to make your company more profitable! This fast-paced session will teach you how to use operational auditing and performance improvement 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.

The Power of "Why?"

Communications & Marketing

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

Today's business leaders need to understand more than simply the financial impact of operations. They need to understand "why" these outcomes occur. Only by understanding the causes can you develop the appropriate actions for improved results. Learn how to understand the root causes of your financial performance. Discover how to use the "5 Whys Method" of root cause identification. Explore how to use these root causes in creating actionable reports.

Presentation Skills for Success: Make Your Message Compelling

★ NEW ★

Communications & Marketing

Dan Chenoweth, MBA, CPA, The Knowledge Institute, LLC

We strive to make effective presentations, but this may not be one of our strengths. Presentation skills are essential to effective leaders, especially for CFOs who must tell their company's story to both internal and external audiences. In this seminar, you will learn; (1) to deliver presentations effectively and with confidence, (2) to take "big picture" information and make it relevant to specific audiences, and (3) to conduct an effective "Question and Answer" session.

Tell Me a Story

Communications & Marketing

William F. O'Brien, MBA, CPA, The Knowledge Institute, LLC

Everyone enjoys a good story. Stories create mental pictures, stimulate critical thinking and provide concrete examples of theoretical concepts. Learn to become a memorable speaker who can move, motivate and lead others through the craft of storytelling. Don't just simply relay your financial results. Discover how to mesmerize your company's audiences in a way that makes it easy for them to come away motivated for action that can improve their bottom-line. Remember, if the audience didn't get the message, you probably delivered it in an unmemorable way! Boost your business communication effectiveness through the medium of storytelling.

Successful financial managers know how to "Connect the Dots." Put the "Power of Why" in your analytical toolbox! Start connecting today!

BUSINESS LAW

Protect Yourself: Legal Responsibilities of Directors

Business Law

John F. Levy, MBA, CPA, Board Advisory

The 21st century's first years have seen unprecedented changes in the roles and demands on our corporate and nonprofit directors. Board members now cope with ever-fuller agendas, greater potential liability, and increasing demands by shareholders, regulators, activists and the government. How should directors respond to these new challenges and how can they protect themselves in a progressively litigious environment? This session discusses directors' legal responsibilities, with particular emphasis on audit committee and the audit committee financial expert responsibilities.

COMPUTER SOFTWARE AND APPLICATIONS

2022 CFO Technology Update

Computer Software & Applications

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

This session provides a comprehensive update of various technology trends and innovations impacting you, your organization and the accounting profession. Topics will include IoT (Internet of Things), artificial intelligence, data analytics, business intelligence, cloud accounting software and more.

Avoiding "Death by PowerPoint": Create Better Presentations

Computer Software & Applications

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Don Minges, MBA, The Knowledge Institute, LLC

We have all suffered through some awful PowerPoint presentations. When a speaker has hundreds of slides with hundreds of words on each slide, we wish we could just lie down and take a nap. This session will help prevent YOU from being that speaker. Veteran speaker and presentation editor John L. Daly will show you the characteristics of good and bad presentations, walking you through a process to create a presentation that keeps your audience awake rather than retreating for another cup of strong, black coffee.

Big Data: Modern Data Analysis

Computer Software & Applications

John F. Levy, MBA, CPA, Board Advisory

In 1958 if you bought a hammer in a local store you probably paid cash. The owner would know only he sold something and had more cash at days end. Today if you buy a hammer from you probably pay with a credit card and the stores know what kind of hammer you bought, your past purchase history, where you live and have approximations of your age, income and much more information. As accountants, we are still recording essentially the same information as in 1957, when our businesses need all the other "big data" to make the best business decisions. Are you and your company ready to benefit from big data? This session will discuss how to get started.

Blockchain Technology – What Every CFO Should Know

Computer Software & Applications

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

One of the most talked about new technologies that has the potential to significantly disrupt the accounting industry is Blockchain. It is getting a lot of attention from many of the thought leaders in the IT industry. This session will provide you with a practical and easy to understand explanation of Blockchain and the potential applications for it in accounting and finance.

Business Intelligence and Analytics: Make Sense of Your Data

Computer Software & Applications

Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC

Volatility and complexity are the new normal. Most organizations are drowning in data, but starving for information. The finance and accounting function has the opportunity to leverage Big Data and the continuum of analytics – descriptive, diagnostic, predictive, and prescriptive. All are useful for better decision making. Collecting, validating, and reporting data is not the same thing as analyzing information where we can glean valuable, actionable insights. In some ways the finance function is many years behind other disciplines such as marketing, sales, and supply chain managers, in applying analytics. How can the CFO's function catch up?

Data Analysis and Management

Computer Software & Applications

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

Studying financial results can tell us ***what*** business activities need improvement, but often leaves little insight into ***how*** to improve. To improve our organization's bottom line, we must learn ways to increase revenue or decrease cost. This comes from gaining new insights about customers, products and processes. Learn more about how to gather and interpret non-financial data.

> ***…[always] has a number of interesting topics and excellent presenters.***
>
> - West Columbia, SC

Excel – Using Charts for a Non-Financial Audience

Computer Software & Applications

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

This session will show you how to use Excel's charting and formatting features to present financial data to a non-financial audience. We will explore the many capabilities of presenting your data without showing rows and rows or columns and columns of data. Learn to create charts with ease; customize the elements of your charts; understand which chart will work best in your situation; and use charting to visually communicate your data.

> ***The instructor was simply outstanding as was the course. I would highly recommend it to others and will look for other courses by this instructor.***
>
> - Indianapolis, IN

Excel – Using PivotTables for Data Analysis

Computer Software & Applications

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

Excel is the #1 data analysis tool for accountants. Yet many accountants have never learned the basics of data analysis using Excel or the tools that Excel offers to help with data analysis. This session will teach participants the importance of PivotTables for analyzing data. We will demonstrate how PivotTables can make analyzing data an easy task for all accountants. Participants will learn the systematic process to create PivotTables and PivotCharts. We will also cover all the setup options and features.

Getting the Most from Your Information Systems

Computer Software & Applications

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

Are your information systems working for you or are you working for your information systems? Your information systems can make your job go smoothly or make your life miserable. In which world would you rather work?

This session provides insights into selecting, installing and using information systems. Even if new software is not in your future, this session will give you insights into improving your current systems, making them far easier to use.

Improving Collaboration Using the Office 365 Teams App

Computer Software & Applications

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

In today's digital world, working in teams can be cumbersome. We have hundreds or thousands of files, emails, voice mails, notes and instant messages stored in different places. If you work in different teams, each team may have their own processes to communicate. There MUST be an easier way you can find all team items in one central place.

That is where Microsoft Teams in Office 365 comes to the rescue. Teams are collections of people, content, and tools that center around different projects and jobs within an organization. Teams is a central "Hub" where all things related to the team are maintained. This includes files, chats, notes, tasks, messages, videos and more. In this course, you will learn how to bring together all your team's conversations, files, and tools in this single workspace.

Introduction to Data Analytics and Microsoft Power BI Tools

Computer Software & Applications

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

Excel is the #1 data analysis tool for accountants. Yet most accountants have never learned the basics of data analysis using Excel or the tools that Excel offers to help in this area. Those that learned to analyze data using PivotTables, soon learned there were many weaknesses in PivotTables that resulted in elaborate calculations in order to perform simple tasks.

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.

KPI Dashboards – The New Financial Reporting Model

Computer Software & Applications

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

CEOs, entrepreneurs, and management professionals are all clamoring for real time financial dashboards. KPI (Key Performance Indicator) dashboards is that application. One of the primary drivers of this dynamic financial reporting model is cloud based accounting systems. This course will introduce you to numerous platforms for developing KPI dashboards: cloud accounting systems, Microsoft Excel and niche applications. We will show you how to embrace this model for your organization or your client

Leverage Big Data and Data Analytics to Make Better Decisions

Computer Software & Applications

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

Two of the hottest topics in business today are big data and data analysis. For CPAs, the ability to unleash the power of big data and data analytics provides an unprecedented opportunity to enhance their market value. The data analytics tools are getting easier to use and more powerful. CPAs are in a prime position to be the go to professionals to help businesses use data analytics to make better business decisions. This course provides a primer on what it is all about and how to leverage it.

Make Your Information Systems Work for You

Computer Software & Applications

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

The first few decades of computerized accounting systems failed to result in any accounting costs reductions and many financial professionals had the vague impression that they were working for the computer system rather than the other way around. The last 25 years have yielded great cost savings for companies who use their information systems effectively. However, many organizations are getting far less from their accounting systems than they should. This session will help stimulate your thinking about how to make your accounting system work for you!

MS Office 365 - Software Applications Lightning Round

Computer Software & Applications

John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. 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 session will provide a high-level review of all the core Office 365 cloud applications, so you can assess the strategic potential for your organization.

MS Word: Advanced Features

Computer Software & Applications

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Brian Maturi, MBA, CA, The Knowledge Institute, LLC

Financial professionals are often Excel experts but are unaware of MS Word tools that can save time and make their written communications considerably more professional looking and easier to read. This session covers tools you have probably never used and others you may not be using correctly. Your whole department could use this course!

Office 365 – What You Need to Know Before You Subscribe

Computer Software & Applications

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

> ***Content was spot on and useful in actual work performance.***
>
> - Charlotte, NC

This course will provide you with all of the information you need in order to understand what Office 365 is all about. It is important to understand that the traditional Office suite of applications is just a small part of what Office 365 has to offer. The real game changer is the Office 365 cloud-based applications that enable and enhance internal and external communication, collaboration and information sharing. Office 365 will do for communication and collaboration what spreadsheet software did for columnar work papers.

Upon completion of this course, you will have a solid foundation of knowledge about Office 365 from which to make the appropriate strategic decisions for your organization. It is not a matter of "if" you should deploy Office 365, it is more likely a matter of "how" and "when."

OneNote – Mastering Organization of Your Notes & Correspondence

Computer Software & Applications

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

OneNote is rapidly becoming one of the most popular applications in the Microsoft Office and Office 365 product suites. The reason for this becomes evident when you learn about all you can do with OneNote to record and manage notes, to do lists, meeting agendas and much, much more. This session reviews all the features OneNote offers and examines how to apply them.

Outlook – Manage Your Email with Maximum Efficiency

Computer Software & Applications

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

Are you finding it more and more difficult to manage the volume of your email messages? Do you worry about missing the follow-up on important emails? Do you feel like you waste a lot of time dealing with unimportant or unwanted emails?

If you answered yes to any of these questions, this session is well worth your investment. We will review Outlook features to manage your inbound and outbound email, saving yourself at least an hour of time each week.

PowerPoint Advanced – Take Presentations from Good to Great

Computer Software & Applications

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

Learn how to leverage the more advanced features of PowerPoint to take your presentations to the next level. You will create more effective presentations with a multitude of advanced features. We will cover slide transitions and animations as well as embedding audio and video content into your presentations. We will show you how to leverage the full capability of SmartArt to make your presentations pop!

We will also discuss how to customize the master layouts to visually improve your presentation by creating a standard custom look. You will learn how to build your own theme and slide layout templates. Once your presentation is complete, we will take you through advanced slideshow presentation techniques. Be prepared to wow your audiences!

PowerPoint Fundamentals – Create Engaging Presentations

Computer Software & Applications

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

In this course you will learn how to create presentations that look professional and clearly deliver your message to your audience. You'll benefit from a step-by-step guide for building a presentation, including understanding the PowerPoint interface. We will also dive into topics such as using themes and layouts; adding graphics, photos and other objects to engage the viewer; and tips & tricks for delivering your PowerPoint presentation.

Roadmap to Excel's Data Analysis and PowerBI Strategy

Computer Software & Applications

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

We are entering an era where CPAs are expected to have data analytics and business intelligence skills. Why is this happening? What can you do to prepare yourself? We will explain data analytics and business intelligence from the perspective of a CPA, both in public and private practice. We will provide a clear and concise review of Microsoft's new Excel and Power BI tools that are built on the Excel platform and provide a roadmap for the most cost-effective way for you to develop these skills.

Roadmap to Microsoft's Office 365 Ecosystem

Computer Software & Applications

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

For any organization that uses the Microsoft Office suite; Excel, Outlook, Word, etc. It is not a question of "if" you should move to Office 365, rather it is "when" and "how." This session is designed to introduce you to the Office 365 ecosystem of over 20 cloud-based applications that are directly integrated with the desktop Office suite of applications.

If you want a quick and easy way to get up to speed on what Office 365 is all about and the strategic impact it can have on your organization, this is a "must attend" session.

I found this session interesting. Speaker…kept my interest for the entire session.

- Atlanta, GA

Excellent program. Excellent presenters.

- Iowa City, IA

2022 FEES FOR ASSOCIATIONS

For pricing information, please contact Lisa Thornton at Lisa@TheKnowledgeInstitute.com or 704-654-1013.

Materials

We provide electronic abbreviated handouts which sponsoring associations may distribute in either electronic or paper form.

Audio/Visual Requirements

Most of our sessions require a data projector, screen and a wireless lapel or headset microphone.

Want More Information?

For more information about programs offered by The Knowledge Institute, see our other catalogs:

The Knowledge Institute, LLC
2203 Wittstock Drive
Charlotte, NC 28210-7254

www.TheKnowledgeInstitute.com

For Further Information,
Contact Lisa Thornton:
Lisa@TheKnowledgeInstitute.com
704-654-1013

or Don Minges:
Don@TheKnowledgeInstitute.com
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