



Wednesday - November 6, 2019  
Click on the title to jump to see course details

Time	Title	Type	Track	Speaker/Moderator
9:00 - 10:00am	<a href="#">Accountant Keynote</a>	Keynote	Keynote	Ariege Misherghi & Michael McQueen
10:30 - 11:30am	<a href="#">Leveraging Cloud-Based Workflows for Nonprofit Organizations</a>	Training	Business Growth	Meredith Smith
	<a href="#">Serving Construction Clients: Top Tips to Help you Own this Niche!</a>	Training	Business Growth	Karen Mitchell
	<a href="#">Ecommerce Accounting: All the things you need to know to pursue this as a niche</a>	Training	Business Growth	Brittany Brown
	<a href="#">All About Job Costing in QuickBooks Online (repeats)</a>	Training	Technology	MB Raimondi
	<a href="#">Everything you always wanted to know about law firm clients but were afraid to ask</a>	Training	Business Growth	Gary Allen
	<a href="#">How to go from FREE to PAID advisory services</a>	Training	Advisory	Nayon Carter
	<a href="#">Negotiating Your Price</a>	Training	Business Growth	Deb Kilsheimer
	<a href="#">Apps and Automation for Your Firm</a>	Training	Technology	Michelle Long
	<a href="#">Mastering the Advisory Services Growth Formula</a>	Training	Advisory	Jim Buffington & Renee Daggett
	<a href="#">Tech Stack Implementation - For Real! (repeats)</a>	Training	Business Growth	Erin Vukelich
	<a href="#">How to Calculate your Fixed Price for Bookkeeping Services so you Always Make a Profit (Repeated)</a>	Training	Business Growth	Mark Wickersham
	<a href="#">The Tipping Point - When the Entire Firm Backs Transformation</a>	Power Panel	Business Growth	Jim Boomer
1:00 - 2:00pm	<a href="#">QuickBooks Online for Churches, Synagogues and other Houses of Worship</a>	Training	Technology	Barbara Starley
	<a href="#">Using QuickBooks Online to serve your Construction Clients</a>	Training	Technology	Karine Woodman
	<a href="#">Setting up and using QuickBooks Online for Multi-Channel Retailers</a>	Training	Technology	William English
	<a href="#">Using Custom Fields in QuickBooks Online Advanced to solve Professional Service clients' reporting needs</a>	Training	Technology	Matthew Fulton
	<a href="#">Working with QuickBooks Online and Law Firms</a>	Training	Technology	Caren Schwartz
	<a href="#">How to Confidently Conduct Your Consulting/Advisory Client Interview</a>	Training	Advisory	Neal Coogler
	<a href="#">Transforming to a Subscription-Based Business Model: From Fighting Fires to Fire Insurance</a>	Training	Business Growth	Ron Baker
	<a href="#">Tech Stack Implementation - For Real! (repeat)</a>	Training	Technology	Erin Vukelich
	<a href="#">Leading with Tax Planning-Simple Strategies to tremendous ROI</a>	Training	Technology	Jackie Meyer
	<a href="#">Evaluating the Health of Your Clients Business</a>	Training	Business Growth	Geni Whitthouse
	<a href="#">How Advisory Changes Your Firm, Your Clients, and Your Team (repeats)</a>	Training	Advisory	Jason Blumer
	<a href="#">All About Job Costing in QuickBooks Online (repeats)</a>	Training	Technology	MB Raimondi
2:30 - 3:30pm	<a href="#">Tax Planning For Non-Profits - Understanding UBIT and the New Laws</a>	Training	Business Growth	Gregg Bossen
	<a href="#">Connect the Dots for Your Construction Clients: Value Added Services That Go Beyond Number Crunching</a>	Training	Advisory	Tonya Schulte
	<a href="#">Choosing and Implementing E-Commerce Apps</a>	Power Panel	Technology	Richard Ropa
	<a href="#">Advanced Reporting for Professional Services clients - Fathom</a>	Training	Technology	Erin Walsh-Dyer
	<a href="#">Advanced Legal Firm issues - Handling Trust accounts And Other Complex Reporting Situations</a>	Training	Technology	Brandy Derrick
	<a href="#">Advisory - How do I actually do it? Key Implementation Tips from People who have done it</a>	Power Panel	Advisory	Bob Wang
	<a href="#">Becoming an Apps Master: Connecting Apps the right way to the QBO Database, for Amazing Outcomes for your Clients (repeats)</a>	Training	Technology	Liz Scott
	<a href="#">Bundled Services are the BOMB</a>	Training	Business Growth	Deb Kilsheimer
	<a href="#">5 Key Skills to Advisory Services</a>	Training	Advisory	Michael Ly
	<a href="#">How to Calculate your Fixed Price for Bookkeeping Services so you Always Make a Profit (repeat)</a>	Training	Business Growth	Mark Wickersham
4:00 - 5:00pm	<a href="#">Best Practices for Handling Non-Profit Audits</a>	Power Panel	Business Growth	Barbara Starley
	<a href="#">Using Apps to solve Key Issues for your Construction Clients</a>	Power Panel	Technology	Heather Satterley

[Making Money in an untapped Niche: Advanced QuickBooks for Convenience Stores and Gas Stations](#)

Training

Technology

Alicia Katz-Pollock

[Serving the Mid-Market Professional Services Niche - Getting and Keeping High-Value Clients](#)

Power Panel

Technology

Matthew Fulton

[How to Provide Advisory Services to your Legal Firm Clients](#)

Power Panel

Advisory

Jonathan Fishman

[5 Key Skills to Advisory Services \(repeat\)](#)

Training

Advisory

Michael Ly

[Value Pricing: Understanding the Art, Science, and Implementation](#)

Power Panel

Business Growth

Ron Baker

[AI Powered Humans: Using AI to Grow Your Practice](#)

Power Panel

Technology

Joe Woodard

[How Advisory Changes Your Firm, Your Clients, and Your Team \(repeat\)](#)

Training

Advisory

Jason Blumer

Thursday - November 7, 2019

Click on the title to jump to see course details

Time	Title	Type	Track	Speaker/Moderator
9:00 - 10:00am	<a href="#"><u>Using Insights to Start a Valuable Advisory Conversation with your Clients (repeats)</u></a>	Training	Advisory	Clayton Oates
	<a href="#"><u>Becoming an Apps Master: Connecting Apps the right way to the QBO Database, for Amazing Outcomes for your Clients</u></a>	Training	Business Growth	Liz Scott
	<a href="#"><u>10 Things The Most Successful Bookkeepers Will Be Doing In 2020</u></a>	Training	Life & Business Skills	Michael Palmer
	<a href="#"><u>Building the People Firm in the Digital World</u></a>	Training	Organizational Culture	Will Farnell
	<a href="#"><u>What's Your Number? Scoring your firm's Health out of 100 and ways to improve</u></a>	Training	Financial Health	John Marshall
	<a href="#"><u>8 Essential Steps to Training a Cloud Bookkeeper (repeats)</u></a>	Training	Organizational Culture	Juliet Aurora
	<a href="#"><u>Creating Businesses that really MATTER (and, grow!)</u></a>	Training	Business Growth	Paul Dunn
1:30 - 2:30pm	<a href="#"><u>Creating Your Ideal Client Profile</u></a>	Training	Business Growth	Kellie Parks
	<a href="#"><u>Communicating Compelling Value to Attract Ideal Clients</u></a>	Training	Business Growth	Bill Cates
	<a href="#"><u>Leading through Change: An Outsourced Journey to Drive Businesses Forward</u></a>	Training	Business Growth	Ashleigh Sutter
	<a href="#"><u>Finding the Best Talent that Aligns with Your Culture</u></a>	Training	Organizational Culture	Michael Ly & Stephanie Stewart
	<a href="#"><u>Creating Businesses that really MATTER (and, grow!) (Repeat)</u></a>	Training	Business Growth	Paul Dunn
	<a href="#"><u>Scaling Your Practice through Business Development &amp; Marketing (Repeats)</u></a>	Training	Business Growth	Jim Boomer
3:00 - 4:00pm	<a href="#"><u>The DNA of a CAS firm</u></a>	Training	Advisory	Laura Redmond
	<a href="#"><u>Scaling Your Practice through Business Development &amp; Marketing (Repeat)</u></a>	Training	Business Growth	Jim Boomer
	<a href="#"><u>8 Steps to Training a Cloud Bookkeeper (Repeat)</u></a>	Training	Organizational Culture	Juliet Aurora
	<a href="#"><u>Building a modern, agile and sustainable firm</u></a>	Training	Business Growth	Darren Root
	<a href="#"><u>Using Social Media to grow your firm EXPONENTIALLY</u></a>	Training	Business Growth	Tyler McBroom
	<a href="#"><u>Using Insights to Start a Valuable Advisory Conversation with your Clients (repeat)</u></a>	Training	Advisory	Clayton Aotes

Friday - November 8, 2019

Click on the title to jump to see course details

Time	Title	Type	Track	Speaker/Moderator
8:00 - 2:00pm	<a href="#"><u>QuickBooks Online Certification Exam Prep</u></a>	Training	Technology	Bryce Forney & Stacy Kildal
10:00 - 11:45am	<a href="#"><u>Advanced Niching Strategies</u></a>	Workshop	Business Growth	Carl Reader
	<a href="#"><u>Client Advisory Service Opportunity Discovery Workshop (Part 1)</u></a>	Workshop	Business Growth	Marty French
	<a href="#"><u>The "Alt" Accountant - Positioning, Pricing, and Innovation</u></a>	Workshop	Business Growth	Hector Garcia
	<a href="#"><u>Why the Smartest Accountants Don't Always Win</u></a>	Workshop	Organizational Culture	Erin Daiber
	<a href="#"><u>Automate Your Client On-Boarding</u></a>	Workshop	Technology	Heather Satterley
	<a href="#"><u>Using Custom Fields in QBO Advanced to solve Professional Services Clients' Reporting Needs</u></a>	Training	Technology	Matthew Fulton

1:00 - 2:45pm

[Building Your Firm's Marketing Plan](#)

[Client Advisory Service Opportunity Discovery Workshop \(Part 2\)](#)

[From \\$100k to \\$1m: The low stress way to grow your practice](#)

[Getting "Old" Data into QuickBooks Online](#)

[Cool New Features in QuickBooks Online, QuickBooks Online Accountant and ProTax Online](#)

[How to Write your Book, Grow your Brand \(and your Business!\)](#)

Workshop

Business Growth

Carla Caldwell

Workshop

Advisory

Marty French

Workshop

Business Growth

Heather Townsend

Workshop

Technology

Deb Kilsheimer

Training

Technology

Alicia Katz-Pollock & Heather Satterley

Workshop

Business Growth

Stacy Ennis

## Course Descriptions

Title, Description & Learning Objectives	CPE	Level	Field of Study
<b>Accountant Keynote</b> First hear from Ariege Misherghi, Accountant Leader at Intuit, who will discuss the evolution of the accounting industry as well as opportunities for the future and new and upcoming innovations in the space. Additionally, trend forecaster Michael McQueen will teach you how to prepare now for what's next. After attending this session, audience members will: <ul style="list-style-type: none"> <li>• Learn how the accountant world is shifting along with the technological innovations that will help you grow and manage your practice</li> <li>• Learn the importance of driving change for your clients</li> <li>• Learn proven and practical strategies to prepare now for what's next, directly from a world-renowned futurist and trend forecaster</li> </ul>	1	All	
<b>Leveraging Cloud-Based Workflows for Nonprofit Organizations</b> In 2015 there were 1.1 million nonprofits registered with the IRS as 501(c)3 public charities. A majority of these organizations reported less than \$5 million in annual expenses. The nonprofit sector offers a huge resource of potential clients for CAS and advisory services. In this breakout session we will briefly review the unique reporting requirements of nonprofits, and then focus on how to set up QBO Plus and integrate 3rd party apps to create workflows that minimize data entry, streamline accounting procedures, and improve internal controls.  After attending the session, audience members will: 1) Have tools for implementing cloud-based accounting workflows for their clients (nonprofit and for profit) 2) Understand the unique needs of nonprofit organizations 3) Be in a position to provide CAS and advisory services to nonprofit organizations.	1	Intermediate	
<b>Serving Construction Clients: Top Tips to Help you Own this Niche!</b> Are you considering focusing on Construction clients? Come and learn 20 essential Tips and Tricks you need to know in order to serve them well. We will also include a review of common construction terms and accounting methods for spec home builders vs remodel companies.  After attending the session, audience members will 1) understand key terminology used in the construction industry. 2) how to set up QuickBooks properly. 3) leave with tips for successfully working with a contractor.	1	Beginning	
<b>Ecommerce Accounting: All the things you need to know to pursue this as a niche</b> Retail trends show that 51% of Americans prefer online shopping. With ecommerce growing 23% every year, there is great opportunity, but ecommerce accounting is complex and confusing causing most accountants to shy away instead of embracing it head on. This class will demystify the complexities, showing you which pitfalls to avoid and how to develop industry expertise in this area. We will discuss the best tools of the space and how to best serve your ecommerce clients.  After attending the session, audience members will 1) Learn how to profile an ecommerce client to understand their complexity. 2) Understand how to engineer the flow of accounting activities for optimal results. 3) Learn which apps and tools should be included in your tech stack for ecommerce clients.	1	Beginning	
<b>All About Job Costing in QuickBooks Online (repeats)</b> any small businesses want to be able to job cost in QBO. In the past, it was easy to assign direct costs and allocate indirect costs to jobs, but not so easy to job cost direct labor. Now you can do it ALL. In this class you will learn who job costing is appropriate for, best practices for set up, ways to project revenue and costs, how to allocate indirect costs, what are the options for job costing direct labor, how to invoice customers and what reports are available related to jobs. In other words, this class will give you a basic foundation on how to set up and use QBO for job costing.  After attending the session, audience members will 1) How to set up QBO for job costing 2) How to track direct and indirect costs as well as labor 3) How to invoice and review reports	1	Intermediate	
<b>Everything you always wanted to know about law firm clients but were afraid to ask</b> Small law firms are a great niche for ProAdvisors. Law firms are stable and make good money, but law firm accounting is complicated and law firms have their own language. This introductory class covers the basics of the industry - its size, characteristics, practice areas and demographics. You will also learn what accounting services different legal segments need, where their pain points are, and how to talk to them about your services. A complete foundation for starting in the legal niche!	1	Intermediate	

After attending the session, audience members will

- 1) understand the size, high level characteristics, practice areas and demographics of the legal industry.
- 2) understand customer personas suitable for your practice.
- 3) understand the main financial and bookkeeping challenges that lawyers face.

#### How to go from FREE to PAID advisory services

1

Beginning

This course will help you learn to stop giving away those advisory conversations for free. Not only will you learn a few of the ways you are advising clients currently (even if it doesn't feel like it) but you will also learn how to ease your existing clients into paying for this value added service, and some guidelines on how to offer the service to new clients. By the end of this session you will also be able to identify at least one advisory service you can go home and implement right away, and get paid for it!

After attending the session, audience members will

- 1) Identify what advisory services you are currently giving away for free
- 2) Strategies on how to go from giving these services away for free to now charging for them
- 3) How to identify and implement one simple advisory service you can offer as soon as you return home from QBC

#### Negotiating Your Price

1

Beginning

When it comes to talking about money and price, many people have a fear and are very uncomfortable. What will they think? Will I charge too little? Too much? Negotiating is a skill to learn. This class will teach how Mirroring, Labeling, Trigger words and Control will assist you in negotiating for your price. Attendees will walk away with the knowledge and the techniques to successfully close the sale.

After attending the session, audience members will understand

- 1) mirroring techniques.
- 2) labeling.
- 3) trigger words that can be identified and used in your next negotiation with a prospect.

#### Apps and Automation for Your Firm

1

Beginning

It is more important than ever that we standardize and automate our firms to improve efficiency and profitability. In this session, we will cover the bookkeeping cycle and possible apps to help you automate the workflow when providing bookkeeping services for your clients. Plus, we will discuss apps to help with your firm management including workflow and task management, onboarding clients, proposals, and more.

After attending the session, audience members will understand

- 1) apps to automate the workflow for clients
- 2) apps to help manage the firm's workflow and procedures
- 3) apps to help onboard clients and more.

#### Mastering the Advisory Services Growth Formula

1

Intermediate

This course will guide multi-service firms through creating capacity in the firm, advisory workflow and how to deliver monthly business insights that hold business clients accountable to their goals and helps power prosperity.

After attending the session, audience members will understand

- 1) processes to capture, document, measure and track Business Client goals.
- 2) a checklist to immediately implement monthly business reviews with business clients.
- 3) how to leverage technology to automate client processes and create an advisory workflow, so you can get to business coaching faster.

#### How to Calculate your Fixed Price for Bookkeeping Services so you Always Make a Profit

1

Intermediate

Why does the move from hourly to value pricing usually lead to FAILURE? The hardest part of value pricing is coming up with the right price. How do you calculate a price in advance knowing with certainty you will make a profit? Based upon the key findings from a recent research study of 2,683 accounting professionals you will learn the exact steps for giving a fixed price for bookkeeping services and how to create a formula you can use every time you price. Additionally, attendees will have the opportunity to download free software to use to solve the problem.

After attending the session, audience members will understand

- 1) How to use regression analysis to help you price with confidence.
- 2) The exact formula for calculating a fixed price for bookkeeping.
- 3) Free software so you can price like the best accounting professionals.

#### Tech Stack Implementation - For Real!

1

Intermediate

We've all heard from the "experts" that we need to develop a tech stack, move our clients to the cloud, add in advisory services...but how do we really do that? The Vendor Hall is filled with apps that you can add to your tech stack. This is NOT about "which apps to use" but rather, HOW to go into a client's place of business and implement the tech they need to make a huge difference in their business success.

After attending the session, audience members will understand

- 1) research and test the apps you choose
- 2) the basics of how to use the app at your own practice
- 3) how to identify test clients to help build internal process and communication styles

#### The Tipping Point - When the Entire Firm Backs Transformation

1

Intermediate

Building and leading a successful Client Advisory Service line takes a champion with a passion for small business success and determination to influence the mindset of the firm's leaders and staff gaining broad alignment along the way. When the firm finds the pot of gold building at the end of the CAS rainbow, everyone takes notice and progressive firm transformation begins. We will hear from some of the industry's most successful CAS Leaders and learn what the tipping point was for their firm's path to transformation.

After attending the session, audience members will understand

- 1) how to present the firm's opportunity for leader alignment.
- 2) how to reimagine staffing for Advisory of the future.
- 3) how to build a culture of empowered successful staff.

#### QuickBooks Online for Churches, Synagogues and other Houses of Worship

1

Intermediate

This course is designed for accountants and bookkeepers who have a heart for serving churches, synagogues, and other houses of worship with QuickBooks Online. We'll cover mistakes typically made in accounting, budgeting, and financial reporting for these unique non-profit entities. We'll discuss some of the interesting and unique needs in the personnel arena. You will walk away empowered to use QBO to help Church Leaders, Treasurers and volunteer Bookkeepers get (and keep) their books in proper order, make wise decisions about the money entrusted to them, and strengthen the financial position of the church so they can fulfill their mission purpose.

After attending the session, audience members will understand

- 1) why all donations are not created equal - and how to properly record every dollar entrusted to the organization, using QBO.
- 2) how to correctly handle employees and other workers in the organization.
- 3) uideline percentages & KPIs important to a strong organization.

#### Setting up and using QBO for Multi-Channel Retailers

1

Intermediate

It can be challenging to support retailers who have physical brick-and-mortar stores and also sell their goods via various on-line channels. In this intermediate-level class, we will cover solutions that integrate with QBO to allow your retailer clients to easily sell their wares in person, on their own websites, and on popular e-commerce sites like Amazon and eBay as well, all while properly tracking their inventory.

After attending the session, audience members will understand

- 1) the importance of having an integrated platform to tie POS and ecommerce together
- 2) some of the most popular options to connect your POS and ecommerce platforms to QBO
- 3) best practices for tracking inventory across all systems utilized for the multi-channel retailer.

#### Working with QuickBooks Online and Law Firms

1

Intermediate

Small and medium size legal firms are growing in number. QBO works for law firms but it is important to understand the limitations for law firms and how to adapt to their particular. Knowing what questions to answer, when to use outside apps and how to choose and integrate those apps can help legal firms to grow and thrive and use QBO most effectively. Consultants can help clients steer clear of hurdles and make the pieces fit together for a happy QBO firm.

After attending the session, audience members will understand

- 1) law firms requirements and what to ask to get started
- 2) how QBO can be tailored to work for law firms
- 3) when to look at apps and how to evaluate

#### How to Confidently Conduct Your Consulting/Advisory Client Interview

1

Beginning

You just got contacted by your biggest potential client ever and they want consulting or advisory services. You've got the skills. How do you conduct that initial client interview confidently? You've probably experienced this: with every service you offer, you can be very good at what you do but selling the service starts with your confidence and demonstration of your competence. In this session, we will look at a variety of ways that you can prepare for and guide the conversation, frame the engagement in a way that best fits your strengths, and deliver a proposal that continues to wow them.

After attending the session, audience members will understand

- 1) tips for guiding the conversation that work even for introverts.
- 2) ideas for deliverables that will set you apart.
- 3) ways to turn your proposal and onboarding process into a further sales opportunity.

#### Transforming to a Subscription-Based Business Model:From Fighting Fires to Fire Insurance

1

Beginning

The world is moving from products and services to subscriptions, favoring access and transformations over ownership and deliverables. The advantages are many, including: Predictable revenue; not selling services, but creating annuities with a lifetime value that far exceeds whatever you paid to acquire them; collective knowledge of your customers, a competitive advantage that cannot be duplicated; one-to-one marketing; not pricing a product or service, but rather customer transformation and peace of mind; you can predict demand and plan capacity more effectively; and it breaks down silos.

After attending the session, audience members will understand

- 1) how to identify strategies utilized by businesses that have made the transition to a subscription-based model.
- 2) an in-depth view of the nine types of subscription business models.
- 3) the psychology of selling subscriptions.

#### Leading with Tax Planning-Simple Strategies to tremendous ROI

1

Intermediate

The future of accounting is in specialists, and tax strategies are the EASIEST specialties to be able to find a return on investment in. Jackie will share her magical ROI worksheet and cover several tax strategies that are easy to implement to begin converting to value pricing with your clients. Attendees will learn how to engage clients in tax planning, create a plan and add to it, measure & communicate tax savings to clients, reinforce the value of tax planning and make preparation easier, and why it matters! Forget theory, this is where you implement.

After attending the session, audience members will understand

- 1) using spreadsheets and template for how to quote a client on value pricing.
- 2) actionable steps to implement 3 specific tax strategies at their firm.
- 3) what resources to do next, to further their growth.

#### Evaluating the Health of Your Clients Business

1

Intermediate

Are you an X-Ray Technician or a Brain Surgeon?

From dashboards to graphs to ratios, you've heard all about diagnosing the financial health of a business - but what can you do to cure any ailments you uncover? In this session you'll learn about common symptoms of struggling small businesses and how to work with your client to identify the right prescriptions for healing them. We'll cover ratios and indicators and how to decide where to focus in achieving financial objectives. You'll leave this session with tools you can apply to every client engagement.

After attending the session, audience members will understand

- 1) taking your clients "temperature"
- 2) communicating the problem
- 3) helping them "heal" their business pains

#### How Advisory Changes Your Firm, Your Clients, and Your Team (repeats)

1

Beginning

"Do you want what Advisory means?" Transforming your firm into an advisory firm comes with responsibilities. It can truly be a journey to the firm you've always wanted, as long as you understand it. Come and learn the things required of leaders that want to transform their traditional firms into advisory firms. We'll journey through this transformation in 3 categories: the firm, the clients, and the team. Are you ready for what advisory means?

After attending the session, audience members will understand

- 1) what a transformation looks like to your FIRM.
- 2) what a transformation looks like to your CLIENTS.
- 3) what a transformation looks like to your TEAM.

#### Tax Planning For Non-Profits - Understanding UBIT and the New Laws

1

Advanced

Changes in UBIT law mean over 600,000 NFP's may now be required to file and pay taxes for the first time. In this interactive session, attendees will learn the mechanics of Unrelated Business Income Tax (UBIT) as well as the new "Parking Tax" that has NFP's in an uproar! After a presentation, attendee contestants will play "Ubit: Jeopardy".

After attending the session, audience members will understand

- 1) the 3 basic rules for when UBIT applies
- 2) exclusions used to avoid the tax
- 3) deducting costs
- 4) the new "Parking Tax" and how to avoid it

#### Connect the Dots for Your Construction Clients: Value Added Services That Go Beyond Number Crunching

1

Advanced

As an advisor to construction companies, you already know how demanding job costing and other construction related accounting tasks can be. Your construction clients are also struggling to keep up with the high level of compliance and paperwork demands that come along with a lot of their projects such as certificates of insurance, warranty letters, and lien documents. Tapping into this need and offering a new level of operational advisory services can set your practice apart from the rest.

After attending the session, audience members will understand

- 1) how to discuss operational advisory needs with construction clients
- 2) where to go to learn more about insurance for contractors
- 3) where to go to learn more about lien law

#### Choosing and Implementing E-Commerce Apps

1

Advanced

There are many apps you can choose to support your clients who sell their goods via popular e-commerce channels. Come and learn from experts who will discuss the apps they like best as well as what type of client each app is best for. The panel members will also share key things to watch for as you go about choosing and installing e-commerce apps for your clients.

After attending the session, audience members will understand

- 1) some of the most popular options to connect your clients' ecommerce platforms to QuickBooks Online.
- 2) the "right client profile" for each app, along with the pros and cons associated with each app.
- 3) key tips and tricks to help you avoid missteps as you choose and install e-commerce apps for your clients.

#### Advanced Reporting for Professional Services clients - Fathom

1

Advanced

Growing mid-market professional service clients have unique reporting needs. In this course, we will look at reporting needs and requirements at multiple levels within your client's organization.

After attending the session, audience members will understand

- 1) checklist of desirable on-demand reports for service-based clients.
- 2) how to build custom reports in Fathom.
- 3) adding High-Value reporting services to your firm's offerings.

#### Advanced Legal Firm issues - Handling Trust accounts And Other Complex Reporting Situations

1

Advanced

Depending on the size & type of law firm you are working with, they have special reporting needs. Learn how to customize reports in QBO, what other tools you might need, & best practices for how to handle situations for different types of law firms. Take an in-depth look at trust ledger reports, expense reports, WIP, and compensation reports. Learn what attorneys need, depending on the type of law they practice and their size, and how to easily get them the information they need.

After attending the session, audience members will understand

- 1) what types of reports different types of law firms need.
- 2) how to talk with confidence about reports for law firms
- 3) how to customize and run legal firm reports within QBO

#### **Advisory - How do I actually do it?! Key Implementation Tips from People who have done it**

1

Intermediate

By now, we all know that we should be providing advisory services. But... how do you actually do it? Come learn from three experts on how they incorporated advisory into their successful practice and became more profitable. You will walk away understanding how they overcame their challenges in creating, pricing, and scaling their advisory services.

After attending the session, audience members will understand

- 1) How to create an advisory offering
- 2) How to price it
- 3) How to scale it

#### **Becoming an Apps Master: Connecting Apps the right way to the QBO Database, for Amazing Outcomes for your Clients**

1

Advanced

In this session, you will gain insight into the design and configuration of QuickBooks Online at the database level. The safeguards and limitations of the QBO Database will be emphasized. We will examine the basic tables of the more frequently used areas of QuickBooks Online when connecting 3rd party apps. There are a variety of 3rd party apps and by understanding the areas of QBO they access ProAdvisors can make more informed decisions as to what apps will help them accomplish tasks, and gain better outcomes for their clients.

After attending the session, audience members will

- 1) better understand the QuickBooks Online database
- 2) be more equipped for selecting QBO apps
- 3) have a deeper knowledge of the 3rd party app ecosystem

#### **Bundled Services are the BOMB**

1

Intermediate

This session provides the framework for multi-service firms to update traditional billing practices to delight clients, to create internal capacity, deliver higher value advisory services and drive double digit growth in firm revenue. Includes best practices to onboard clients to the right service levels. Attendees will be equipped with client messaging and sample bundled service packages that better communicate firm value.

After attending the session, audience members will

- 1) understand why leading firms use bundled services to deliver advisory services.
- 2) use bundled service templates to immediately update the firm's business model.
- 3) use client messaging to onboard clients to the right advisory service level to power prosperity for clients.

#### **5 Key Skills to Advisory Services**

1

Intermediate

As bookkeeping becomes more of an automated and commoditized service, learning how to successfully implement Advisory services will be important for you to differentiate yourself and stay competitive. Come learn the 5 Key Skills to Advisory Services and how you can master these skills to have a successful advisory practice. Walk away with practical next steps on your advisory journey.

After attending the session, audience members will understand

- 1) what skills ProAdvisors & bookkeepers already have mastered that will benefit their advisory journey
- 2) what new skills they must learn and master to be successful advisors
- 3) how they can help others in their practice to learn these 5 Key Skills

#### **Best Practices for Handling Non-Profit Audits**

1

Intermediate

Most nonprofits go through an audit or review by an outside CPA either annually or periodically. This process can be challenging and stress both the bookkeeper and the organization. In this course, learn what auditors are looking for and how to quickly be ready with everything they ask for – before they ask for it! A panel of nonprofits auditors will be on stage as attendees play rounds of “Ask the auditor... everything you've wanted to ask your clients auditor but were afraid to ask.”

After attending the session, audience members will understand

- 1) the list of key items needed by nonprofit auditors
- 2) key tips and tricks for getting these things directly from QBO, when possible
- 3) gain tips for dealing with “challenging” auditors

#### **Using Apps to solve Key Issues for your Construction Clients**

1

Intermediate

Construction clients need you to advise them on best practices and solve challenges they face with running their businesses efficiently and from the field. Come and learn from experts who work with construction clients to help them automate and improve their businesses and using apps.

After attending the session, audience members will understand

- 1) key challenges construction clients face when running their businesses from the field.
- 2) discover available solutions to common business challenges faced by construction clients, and the pros and cons for each solution.
- 3) key tips and tricks from peers who regularly use apps to help their construction clients automate and improve their business operations.

<b>Making Money in an untapped Niche: Advanced QuickBooks for Convenience Stores and Gas Stations</b> <p>There are thousands of convenience stores and gas stations in the US. They are an untapped niche for you provided you know how to automate and streamline their complicated retail environment! Come and learn advanced techniques to track fuel, food, merchandise sales, ATMs, lottery tickets, incentives, local charges, employee charges, and hot food sales.</p> <p>Learn how to sync the POS, set up the Chart of Accounts, Products, and Recurring Transactions, so that everything runs smoothly.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) how to set up a QuickBooks file for a convenience store and/or a gas station.</li> <li>2) track daily sales and incentive reimbursements.</li> <li>3) track A/R and A/P for charge accounts and employee charges.</li> </ol>	1	Advanced
<b>Serving the Mid-Market Professional Services Niche - Getting and Keeping High-Value Clients</b> <p>Mid-market companies represent an exciting niche for you to tap, but they have longer sales cycles, more decision makers involved, and special needs once you close them as a client. Come and learn key strategies from experts who serve and advise mid-market clients, so you can make 2020 your most profitable and exciting year yet.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) key strategies to move mid-market prospects through your marketing funnel and close the sale quickly.</li> <li>2) how mid-market clients differ from small business clients, and the services you need to provide to keep them happy.</li> <li>3) new strategies to advise them, and tools that are available to help you harness the data and turn it into actionable insights for these savvy clients.</li> </ol>	1	Beginning
<b>How to Provide Advisory Services to your Legal Firm Clients</b> <p>If you already have law clients, you want to evolve the relationship. To do that, you need to know the specifics of law firm workflows, who works there, metrics and compliance.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) how do I get out of reconciliation and into being a trusted advisor?</li> <li>2) how do I work with larger firms.</li> <li>3) key metrics of the law firm ecosystem. □</li> </ol>	1	Beginning
<b>Value Pricing: Understanding the Art, Science, and Implementation</b> <p>In the last 5 years, the subscription market has grown 100% annually. Subscription companies are now growing 5X faster than US retail sales (17.6% vs. 3.6%). There are different business models you can adopt with Value Pricing, including charging your clients using the subscription model. Your peers will share key tips and strategies to implement and drive predictive revenue with Value Pricing.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) strategies, best practices and watch-outs for implementing Value Pricing.</li> <li>2) about the various types business models that leverage Value Pricing.</li> <li>3) how to have this conversation with your clients. □</li> </ol>	1	Intermediate
<b>AI Powered Humans: Using AI to Grow Your Practice</b> <p>AI can become your superpower instead of your greatest enemy. Computers can already diagnose some cancers better than doctors. But no one wants the computer telling them that they have cancer. The same will be true for diagnosing businesses problems. Learn how the panel members are leveraging the technology of today and developing the technology of tomorrow that will allow you to become better advisers and coaches.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) how to stop fearing what AI will do to your practice.</li> <li>2) tools you can use to quickly provide you the information you need to be an advisor.</li> <li>3) how to automate low level advisory.</li> </ol>	1	Intermediate
<b>Using Insights to Start a Valuable Advisory Conversation with your Clients (repeats)</b> <p>Behind every set of numbers there's a human story, our skills as the "Natural Numbers Whisperer" brings this story to life for our clients. When viewed through our lens as a professional advisor real time data can transform from information into insights. This session is about identifying &amp; delivering insights to your clients. We are in the knowledge transfer &amp; client empowerment business (we just happen to utilize Accounting as the delivery vehicle). This session will give you the confidence &amp; practical next steps to take on your advisory journey.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) how to initiate a Business Systems Review for your clients.</li> <li>2) key reports in QBO that will help initiate your client advisory conversation.</li> <li>3) how to deliver the one valuable advisory service that most clients want that all Accountants and Bookkeepers can deliver; however most aren't.</li> </ol>	1	Intermediate
<b>10 Things The Most Successful Bookkeepers Will Be Doing In 2020</b> <p>With technology and competition squeezing out many bookkeeping business owners, there are ways to remain relevant and profitable in a changing financial world. Successful Bookkeeper podcast host, Michael Palmer has interviewed and coached hundreds of bookkeepers, so he's discovered what separates those who are successful or not. In this session, he'll break down the vital activities, strategies and resources you'll need to be profitable and valuable in 2020.</p>	1	Beginning



<p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) how to create a positive mindset for business success</li> <li>2) how to choose the right automation app for better workflow efficiency</li> <li>3) how to use podcasts as professional development learning tools for their success</li> </ol>		
<p><b>Building the People Firm in the Digital World</b></p> <p>Millennial generation, technology, competition and so much more is driving a shift in expectations of our clients and the people we need to employ to deliver great experiences to our clients. How do firms make sense of this and build not only great brands but as an extension to this, a firm personality? It takes a fundamental shift in culture, mindset, values and attitudes. Will Farnell, will share some of the cultural initiatives within his own firm, that have led to a more highly engaged, loyal and high performing workforce.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) the importance of knowing and articulating vision</li> <li>2) why values are so important to the next generation of business owners and how to build them in your firm</li> <li>3) how to engage your team in driving change and the steps to take to get them onboard</li> </ol>	1	Intermediate
<p><b>What's Your Number? Scoring your firm's Health out of 100 and ways to improve</b></p> <p>You know your practice is capable of more: profit, billing and free time. But you're trapped on the treadmill of daily issues. In this interactive, fun and collaborative presentation, you're going to learn something very insightful. You're finally going to discover what's holding you and your firm back. It's your 'vital number'. Your 'number' is a score out of 100 based on 6 key areas. These are the 6 areas that highly successful practices focus on consistently to be even more successful.</p> <p>After attending the session, audience members will</p> <ol style="list-style-type: none"> <li>1) understand your 'number' and for the first time ever, discover how healthy, unhealthy or under performing your practice is, on a score out of 100.</li> <li>2) identify areas within your practice that need immediate attention to improve your billings, processes and profit.</li> <li>3) gain new insights, ideas and clarity, as you collaborate with your colleagues during the small group break out session.</li> </ol>	1	Intermediate
<p><b>8 Essential Steps to Training a Cloud Bookkeeper (repeats)</b></p> <p>Intuit statistics have revealed that it takes on average, 18 months for a bookkeeper to become Cloud Savvy. Many firms hesitate to move to QBO and the cloud because they can't afford this time commitment, or they don't have the internal resources to carry their employee while they learn the new information. We will cover the fundamentals of what needs to be done to maximize the training of a new hire, or an existing employee to have them contributing to your bottom line after Week One.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) key steps to gain clarity on the state of your current training system.</li> <li>2) a step by step roadmap to implement your training program.</li> <li>3) Five key mistakes to avoid in your training program. Learn from methods used in a real-life Firm of the Future.</li> </ol>	1	Intermediate
<p><b>Creating Businesses that really MATTER (and, grow!)</b></p> <p>Join this fast-paced, profound and inspiring session showing Partners in any-sized firm how to create and retain seriously GREAT clients, how to become a lightning-rod to attract fantastic talent, how to connect with their community in brand new ways and how to leave a legacy of which they're justly proud. Accountants leave this session ready to apply what Paul calls 'the Legacy Pathway' where they understand not just how to leave a great legacy but how to live it and leverage it in stunning ways.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) how to position their firm to create and retain seriously GREAT clients,</li> <li>2) how to create a culture in their firm that lets them become become a lightning-rod to attract fantastic talent</li> <li>3) how to apply simple skill-sets to create a massive impact in both their and their clients' businesses.</li> </ol>	1	Intermediate
<p><b>Creating Your Ideal Client Profile</b></p> <p>This is not a session on the theory of "The Ideal Client". Let's map out - right in this session - what elements an Ideal Client include (or don't include) and get your template locked down. We will create an real world, ready to implement Ideal Client Profile in this session. Let's get you moving on streamlining workflows, spending the day doing work you love with profitable clients you enjoy.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) what the elements of an Ideal Client include (or don't include).</li> <li>2) why an Ideal Client Profile creates effectiveness for your workflows.</li> <li>3) how to create an actual, actionable Ideal Client Profile</li> </ol>	1	Intermediate
<p><b>Communicating Compelling Value to Attract Ideal Clients</b></p> <p>Sharpen your value proposition, cut through the noise, and win more ideal clients – clients who are perfect for your business. Your prospects and clients are bombarded with messages from all directions. Come and learn how to hit the bullseye in their brain with a highly-relevant and critically- compelling message that grabs their attention and moves them to action.</p> <p>After attending the session, audience members will understand</p> <ol style="list-style-type: none"> <li>1) a simple, 3-step process to identify your client-focused value proposition and that will bring everyone in your firm onto the same page with your value.</li> <li>2) the brain science behind decision making so you can communicate your value in a way that will catch the attention of your ideal prospects.</li> <li>3) simple formulas for answering the questions, "What do you do?" and "What makes you different?"</li> </ol>	1	Intermediate
<p><b>Leading through Change: An Outsourced Journey to Drive Businesses Forward</b></p>	1	Intermediate

Implementing processes or growing your team—the challenges of fostering innovation can seem overwhelming. So how do you successfully implement visionary changes without disrupting your current success? The story of how Elliott Davis transformed its outsourced accounting practice from a small group of paraprofessionals to a robust team of degreed and licensed professionals will inspire your future-ready efforts. In this session, you'll learn tactical steps required to embrace change, manage through unintended consequences, and take your practice to the next level.

After attending the session, audience members will understand

- 1) barriers to change in order to properly plan for them.
- 2) tangible steps to implementing change infrastructure.
- 3) communication strategies for sharing the vision with your team.

#### Finding the Best Talent that Aligns with Your Culture

1

Intermediate

Cloud-based software and communication tools have made it easier to find talent globally. Remote jobs are so highly coveted that some candidates are willing to take up to a 50% decrease in compensation to work remotely. With so many applicants, how do you identify and filter candidates so that you have top talent AND a cultural fit that will enable your company to reach its goals? What tools (and processes) work best to find, narrow down, and select the best candidate that stays with a fast growing start up? Having the right skill set and cultural fit creates a synergy that will help drive the organization towards its goals at a rapid pace.

After attending the session, audience members will understand

- 1) why cultural fit matters (even more than skills).
- 2) tools to streamline the recruiting process.
- 3) once you've narrowed down your candidates, how to identify the best fit.

#### Scaling Your Practice through Business Development & Marketing (Repeats)

1

Intermediate

In this session, you will learn how to message and communicate your value proposition through strategic sales & marketing initiatives. Great messaging allows you to effectively educate your clients and prospects about your firm's capabilities and the value they will recognize by engaging you for additional services. This session will provide you with the framework to focus on how to tell your story through website content & messaging, email nurturing, sales letters & conversations, generating leads and how to gather the best customer testimonials.

After attending the session, audience members will

- 1) learn the most essential sales and marketing strategies that will allow your practice to scale.
- 2) gain clarity on the on how your firm can achieve the results you are looking for through your sales and marketing initiatives.
- 3) learn how to capture client testimonials.

#### Building a modern, agile and sustainable firm

1

Intermediate

Modern firms are firms selling the right products to the right clients. Learn how to market for right clients, flow them into your CRM to sell them the right products and then execute effectively. Turn your firm into a well oiled machine that is positioned to thrive now, and into the future.

After attending the session, audience members will understand

- 1) how to market for new clients.
- 2) to turn your offerings into off-the-shelf products.
- 3) use a Client Relationship Management tool to create opportunities.

#### Using Social Media to grow your firm EXPONENTIALLY

1

Beginning

In this session, Tyler McBroom, CPA will break down the strategies and tactics he has used to generate six figures of new business per month from Instagram alone, plus common strategies for other social media channels. Tyler will share how he went from 500 followers to over 50,000 followers in just over a year, how to create content that engages your audience, plus his system for turning followers into actual paying clients. If you want to grow your firm rapidly without needing to attend late night in-person mixers or association board meetings, this session is for you.

After attending the session, audience members will understand

- 1) how to set up their Instagram account for business and view their follower activity.
- 2) a content strategy they can use to post regularly.
- 3) a system for converting social media followers into leads/clients.

#### Advanced Niching Strategies

2

Advanced

This Workshop is for accountants who know that they want to niche their firm. Come and learn what is involved in influencing your chosen niche, how to differentiate from generalists and what a niche client expects versus a general client. Learn how to re-align your niche if needed and come away with a list of activities to help you further penetrate your market. But more importantly, learn from the life lessons of the instructor and from each other during table discussions!

After attending the session, audience members will understand

- 1) steps to re-align their niche if needed
- 2) activities to further penetrate their market
- 3) key best practices from the 'life lessons' of the instructor and the participants

#### Client Advisory Service Opportunity Discovery Workshop - Part 1

2

Intermediate

In this two part workshop, you and one other key firm leader will use your own firm's data and industry best practice ideas to uncover the right business model for building a modern Client Advisory Service practice at your firm.

After attending the session, audience members will

- 1) have a basic strategy and business model for building a modern Client Advisory Service practice.
- 2) have a business model ROI and associated timeline, including initial cost to execute on the strategy.
- 3) have confidence to act swiftly, on the transformation strategy for the betterment of the firm and its staff.

#### The "Alt" Accountant - Positioning, Pricing, and Innovation

2

Advanced

The modern accountant needs to niche/specialize, price services based on value and innovate in order to stay relevant. In this highly interactive workshop, we will discuss Positioning: how the customer sees you as positioned to solved their problems or serve their specific needs, Pricing: the way customer determines if they truly value the OUTCOME from working with you, and Innovation & Advisory: how you can create unique and exciting products and services that are non-commoditized.

After attending the session, audience members will

- 1) have a basic strategy and business model for building a modern Client Advisory Service practice.
- 2) have a business model ROI and associated timeline, including initial cost to execute on the strategy.
- 3) have confidence to act swiftly, on the transformation strategy for the betterment of the firm and its staff.

#### Why the Smartest Accountants Don't Always Win

2

Advanced

Many leaders don't realize that they are ineffective and are holding their firms back from achieving great results. The skills that separate successful accountants with loyal clients from the less successful, burned out accountant are not what you think they are! Discover the key skills you need to improve your personal performance and understand what you're doing that is creating a bottleneck in your results- Hint! It's NOT WHAT YOU THINK IT IS! With this new understanding, we'll explore how to uncover and develop the potential in your team members and grow your firm exponentially.

After attending the session, audience members will

- 1) identify the approaches that they're using today creating bottlenecks and inefficiencies in their leadership (and results) so that they can start to change this behavior immediately.
- 2) identify the One Big Thing that they can start doing to improve their leadership effectiveness.
- 3) leverage tools to seek meaningful feedback from their peers, team members and direct reports to continue their development.

#### Automate Your Client On-Boarding

2

Advanced

Join Zapier Expert, Heather Satterley, as you design an automated client on-boarding workflow for your firm! Automate initial client scheduling, communications, document collection, engagement letter execution and the data entry of client information into the apps you already use in your firm. This session will be hands-on and requires pre-work to be completed before the session.

After attending the session, audience members will

- 1) walk away with a plan to automate your client on-boarding
- 2) learn new skills using the Zapier automation platform
- 3) deepen your proficiency with workflow design

#### QuickBooks Online Certification Exam Prep (8:30 - 2:30pm) - working lunch provided

6

Intermediate

This training will provide you with the skills and knowledge required to provide a professional level of support to small business clients and help them succeed using QuickBooks Online. Attendees will learn all the key features and best practice workflows needed to support clients through the end to end accounting life cycle. At the conclusion of the training, you'll be better prepared to take the Certification exam with confidence.

After attending the session, audience members will

- 1) be able to describe how to set up a new client and ensure correct settings are applied based on client needs.
- 2) understand how to use QuickBooks Online Accountant and QuickBooks Online to support a typical small business client.
- 3) reconcile accounts, close books at period end, run basic reports etc in preparation for the certification exam.

#### Using Custom Fields in QBO Advanced to solve Professional Services Clients' Reporting Needs

1

Advanced

Data Quality is vital to the success of any business, especially companies in the professional service sector. Whether you are serving a law firm, accounting practice, or marketing company, the importance of tracking specific details at the invoice level often becomes time intensive and expensive. Discover how using custom fields in QuickBooks Online Advanced will increase your profitability by streamlining your workflow while improving the accuracy of your data. You'll also learn how to uncover additional advisory opportunities utilizing custom reporting based on your custom fields.

After attending the session, audience members will:

- 1) Understand which custom field to use and when to use it.
- 2) Create customized reporting utilizing your custom fields.
- 3) Uncover advisory opportunities hidden within your client's data.

#### Building Your Firm's Marketing Plan

2

Intermediate

As accounting professionals we want and need to attract new clients, but how? This session is a workshop providing best practices and exercises to guide you through creating a tailored marketing plan ready to implement immediately. You'll review what you have, identify what you don't have, and then plan where you want to be. You'll work through action steps to fill in the gaps, creating an actionable, tailored marketing plan on paper before you leave.

After attending the session, audience members will:

- 1) Learn best practices for marketing a firm.
- 2) Rank your current marketing plan and assets.
- 3) Create an actionable marketing plan on paper, tailored for your own firm.

<b>From \$100k to \$1m: The low stress way to grow your practice (workshop)</b>	2	Intermediate
<p>Growing your practice can often mean working long hours, high levels of stress and worrying about paying the wages and your mortgage at the end of the month. And do you wish your team would pull their weight? There is another way. This session will take you through the 3 phases of growth, and key activities in each phase (ignore these at your peril), plus the 4 key resources you need to obsess about, to build a scalable &amp; profitable \$1m firm.</p> <p>After attending the session, audience members will:</p> <ol style="list-style-type: none"> <li>1) Identify immediate priorities to minimise your firm's growing pains.</li> <li>2) Design a roadmap you can follow to make your firm scalable.</li> <li>3) Lean tips on how to radically reduce your stress levels and working hours.</li> </ol>		
<b>Getting "old" Data into QuickBooks Online</b>	2	Intermediate
<p>Ever have a client ask for years of data to be entered into QBO? This class will show you how to get data into QBO using APPS to import it quickly and easily. You'll learn how to format an Excel document properly for importing into QBO, and how to work with a client to keep costs down with them getting the data ready for import. You'll be amazed at the speed you can do client catch-up work so you can collaborate with them to make a difference in their financial future.</p> <p>After attending the session, audience members will learn:</p> <ol style="list-style-type: none"> <li>1) When to use this technique.</li> <li>2) How to use the technique.</li> <li>3) How to verify the result.</li> </ol>		
<b>Cool New Features in QuickBooks Online, QuickBooks Online Accountant and ProConnect Online</b>	2	Advanced
<p>Look what I found! Are you so busy taking care of your clients that you haven't taken the time to explore QBO, QBOA and ProConnect Online's new tools? Let's take a look at all those new little buttons and big feature enhancements that make each a pleasure to use. These hot new tools will help streamline your workflow and capture back time you didn't know you had!</p> <p>After attending the session, audience members will</p> <ol style="list-style-type: none"> <li>1) discover hot new features you haven't tried yet.</li> <li>2) explore cool tools you never used before.</li> <li>3) learn fancy tricks so that you don't get burnt.</li> </ol>		
<b>How to Write your Book, Grow your Brand (and your Business!)</b>	1	Beginning
<p>Writing a book can be a business game changer, helping expand your reach, influence, and revenue. In this interactive workshop you'll learn a clear, practical process to go from idea to first draft: developing a book idea; outlining the book; and creating a writing schedule and routine. You'll also learn the potential draft-abandoning obstacles in your journey to author-hood, along with a high-level overview of the next steps and resources to publish your book and share it with the world.</p> <p>After attending the session, audience members will</p> <ol style="list-style-type: none"> <li>1) learn how to define your audience and develop a compelling book idea.</li> <li>2) create a detailed book outline.</li> <li>3) understand how to create a writing plan and set milestones to increase likelihood of success.</li> </ol>		
<b>Using QuickBooks Online to Serve Construction Clients</b>	1	Intermediate
<p>In this session, you will learn how to use the functions within QuickBooks Online to satisfy the components required for your construction clients. You will learn basic construction terminology and learn to navigate QuickBooks Online's construction functions such as using Projects, creating an estimate and managing progress invoicing. You'll also learn about the chart of accounts structure, how to use products and services as cost codes and manage basic job costing. You'll be amazed on how much construction functionality is in QuickBooks Online as a stand-alone product.</p> <p>After attending the session, audience members will</p> <ol style="list-style-type: none"> <li>1) learn the basics on construction accounting.</li> <li>2) learn what are the construction specific tools within QuickBooks Online.</li> <li>3) learn how to use the QBO tools successfully for their construction clients.</li> </ol>		
<b>The DNA of a CAS firm</b>	1	Intermediate
<p>In a world of change, accounting professionals are looking for the "how". How to communicate? How to collaborate? How to leverage technology? Laura Redmond, awarded 2019 Top Client Accounting Service ProAdvisor, goes behind the scenes to share her firm's methods for running a modern CAS practice. She will provide details that you can incorporate into your own business, including successful solutions for marketing, sales, onboarding, service delivery, and support.</p> <p>After attending the session, audience members will learn the</p> <ol style="list-style-type: none"> <li>1) process for selling CAS.</li> <li>2) actions for onboarding new clients.</li> <li>3) solutions for client support.</li> </ol>		