Market Disruption: Where Innovation and Negotiation Intersect

SCOTT WAYNE, ENVOY

What do the best innovators and negotiators have in common? They recognize patterns, and breaks in patterns, they evaluate threats and opportunities from multiple perspectives, they observe behaviors rather than survey behaviors, and they model choices and build interventions to redirect those choices.

Scott Wayne, a former diplomat and managing partner of one of the world’s leading Market Intelligence firms, distinguishes between product innovation (the creation of new products) and market innovation (the creation of new markets) and examines the role that negotiation techniques play in each.

See how companies have mapped customer and clients lives to identify opportunities to create new products and services and to guide customers to shift spending from an old market to the new market. We’ll look at well known examples such as ride share or low cost airlines, but also to share current research that Scott is working on that sheds light on how customers and clients are shifting and how we can respond.

Focus is placed on how B2B client lives are changing and how if we map their worlds we can identify ways in which to improve and innovate the services we provide.
B1. PDF Tools for Productivity

Val Steed, CPA, CITP, MAcc
Stop struggling with PDFs! Adobe Acrobat provides access to many features which make working with PDFs a breeze. Learn how you can use these features for improved efficiency and data security. More specifically, learn about PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, and securing PDF documents. Importantly, mastering these tools helps you to work more effectively and efficiently with PDF documents. Join us in this very timely program and learn the top features necessary to optimize your PDF documents.

B2. They Want Us to Do What?

A FASB Update

Leah Donti, CPA (Canada), CMA, MBA
2019 is proving to be another busy year for FASB. This presentation delves into the hot issues facing private and public companies. Topics covered include: FASB Accounting Standards Updates effective in 2019, Recent Developments on the new Lease standard, fair value measurement changes, and changes to related party guidance for variable interest entities.

B3. Ethics: 50 Shades of Gray

Peter Margaritis, CPA, CGMA, MAC
Ethics should be a black and white issue. However, if you ask most CPAs, they would say ethics is a very gray area. Why is this? It seems like at least once a month there is an article written in the Wall Street Journal about someone committing fraud. We discuss real-world cases such as Wells Fargo, Theranos, and the most current case of ethics violations in the news.

B4. The 7 Principles of Fierce Conversations

Amy Stumme, CPCC
“Our work, our relationships, and our lives succeed or fail one conversation at a time. While no single conversation is guaranteed to transform a company, a relationship, or a life, any single conversation can.” Susan Scott, Fierce Conversations. In this session, learn how to apply the 7 principles of Fierce Conversations to elevate your conversations and relationships.

B5. Employee Benefit Trends: What Appeals to Different Generations

Larry Morgan, MA, SPHR, SHRM-SCP, GPHR
With a tight labor force and millennials comprising nearly 30 percent of the workforce, employers are struggling to find the right mix of benefits to please employees of varying generations. Whether you’re looking to appeal to new graduates, returning retirees or anyone in between, there are many benefit options out there to help you attract and retain top staff. Explore current benefit trends, new alternatives and ways to promote benefits as part of your employee value proposition. Learn about different generational needs, interests and motivations while finding cost effective options.
C1. EXCEL POWER QUERY – TEN THINGS YOU NEED TO KNOW
VAL STEED, CPA, CITP, MAcc
Microsoft has updated Excel’s Power Query tool – first released in 2010 – with many new features. Power Query now provides users with the ability to access, link, and clean data to prepare it for reporting. In this session, learn ten things every Power Query user should know to make it easier to create powerful reports in less time from any data source.

C2. ROLLING FORECASTS: BEST PRACTICES AND IMPLEMENTATION
LEAH DONTI, CPA (CANADA), CMA, MBA
Traditional budgeting is obsolete. The rolling forecast is the future. This session focuses on implementation and best practices of the rolling forecast. Topics covered include: key steps in implementing a rolling forecast, common pitfalls to avoid and how to convince management to adopt the continuous rolling forecast.

C3. VALUE OF COLLABORATION – THE ART OF RELATIONSHIP MANAGEMENT
PETER MARGARITIS, CPA, CGMA, MAC
CPAs are in the people business first and everything else is a by-product. Effective communication, emotional intelligence awareness, and stronger leadership skills are important aspects that can increase your company’s transparency. Becoming a better communicator starts with active listening, asking probing questions and parking your agenda. Emotional intelligence is the awareness of yours and others’ emotions and using this information to guide your thinking and behavior. Becoming a better leader has nothing to do with your title. Effective leadership is the positive effect that you have on another person, no matter what their title.

C4. FACILITATION AS A CORE LEADERSHIP COMPETENCY
AMY STUMME, CPCC
Today’s leaders need to manage constant change. There are urgent problems and issues we need to solve in our organizations. Managers are expected to facilitate collaborative processes that elicit ownership by generating active participation and empowering people to take charge. One of the most important sets of skills for leaders are facilitation skills. These are the “process” skills we use to guide and direct key parts of our organizing work with groups of people. Whether it’s a meeting (big or small) or a training session, someone has to shape and guide the process of working together so that you build consensus, engage your staff and accomplish your goals. While a group of people might set the agenda and figure out the goals, one person needs to concentrate on how you are going to move through your agenda and meet those goals effectively. This is the person we call the “facilitator.”

C5. ME, TOO! CONCERNS FOR EMPLOYERS WITH HARRASSMENT AND BULLYING
LARRY MORGAN, MA, SPHR, SHRM-SCP, GPHR
The #MeToo movement has inspired employers to take a renewed interest in eliminating harassment and bullying in the workplace. However, doing this effectively means knowing what behaviors are – and aren’t – appropriate at work. In this timely session, learn what is meant by “acceptable conduct”, how to build effective policies and processes around it, and what to do when employees cross the line. Hear new guidance from the Equal Employment Opportunity Commission on how to conduct effective training and what preventive measures you can take. Plus, make sure you understand how to investigate and properly document when bad behavior occurs.
D1. SALES TAX COMPLIANCE IN A POST-WAYFAIR WORLD
VAL STEED, CPA, CITP, MAcc
The Supreme Court’s Wayfair decision changes the game with respect to sales tax compliance. Now, many states are rushing to implement laws requiring even small businesses to charge, collect, and remit sales taxes on transactions that cross state lines. As a result, sales tax compliance just became infinitely more complex and many businesses could be looking at substantial fines and penalties for not complying. In this session, learn about your new compliance requirements and about tools that you can use to meet these requirements.

D2. SELF-PERCEPTION, MISCONCEPTION
DANIEL SHANNON
Self-Perception, Misconception gives everyone a stronger sense of self and an understanding for why it is important to be deliberate about defining their personal and professional brand. Participants ask and answer several questions about themselves to determine the healthy as well as unhealthy characteristics and habits that have been developed over time. Ultimately, this program identifies the connection between perception-management and performance management, leading participants to be more critical when adopting certain behaviors and attitudes at work and in their lives.

D3. HOW TO IDENTIFY, EXPLAIN, AND PRESENT PERTINENT FINANCIAL INFORMATION TO NON-ACCOUNTANTS
PETER MARGARITIS, CPA, CGMA, MAC
Do your business associates have difficulty understanding the financials? Are they making decisions without comprehending the financial impact of their actions? Do they frequently smother in detail and crave for knowledge? This program is loaded with practical ideas and techniques to help associates and clients make better business decisions. Financial Information is one of management’s most useful tools, yet far too many non-accountants are unable to read financial reports and use this information to enhance performance. This session is especially beneficial with today’s emphasis upon Teambuilding, Total Quality Management, and Employee Involvement, where responsibility, authority, and decision-making are shifting to lower organization levels.

D4. DEVELOPING RESILIENCE TO MANAGE STRESS
AMY STUMME, CPCC
My favorite definition of resiliency is the ability to struggle well. In this session, learn how to increase our resiliency by learning three skills: Realistic optimism, Accurate & flexible thinking / Avoiding thinking traps and Emotional awareness & regulation.

D5. HR COMPLIANCE UPDATE
LARRY MORGAN, MA, SPHR, GPHR
This update covers navigating the new human resource, National Labor Relations Board and Department of Labor Laws including union elections, social media, required handbook edits and discrimination training issues. Topics will include FLSA, FLMA, ADAAA, fiduciary role changes, NLRB decisions and changes to the Affordable Care Act that affect employers.
A Different Kind of Different will take an unconventional approach to diversity, not only speaking to its traditional definitions, but also addressing the growing need to alleviate costly generational disconnects in a multi-generational workforce and market. In addition to bridging generational gaps, Daniel highlights prominent differences among us that influence the decisions we make from day to day and the allocation of our resources. Our speaker, Daniel Shannon, is first and foremost a visionary. Vision has been the guiding component for success in his life. Daniel imparts lessons from his experiences; traveling the globe, competing with and against some of the world’s most talented athletes as well as his time as a leader in Corporate America, to create this insightful and entertaining presentation.

You’ve read the headlines. Unfortunately, the question now is not if your information is going to be accessed or stolen, but when. Perhaps surprisingly, organizations are not immune to these attacks. In fact, organizations of all sizes are at increased risk for security breaches. To inform the attendees of current developments in the digital underground as well as provide realistic advice for cyber protection, Mark Lanterman discusses recent high profile cyber-crime events, including breaches impacting retailers, banks, and government agencies. Mark also discusses particularly dangerous types of threats that might affect us such as phishing, data breaches, the Dark Web and the Internet of Things.
THURSDAY, MAY 23 | 10:00 - 11:40

G1. EXCEL'S BEST NEW FEATURES
THOMAS STEPHENS, JR., CPA.CITP, CGMA
With the release of Excel 2019 and updates in Excel provided through Office 365 subscriptions, Microsoft continues to pack new features into the popular spreadsheet tool. Enhancements to Power Query, new functions, and improved collaboration opportunities are all available. Learn about these features and how to apply them to improve productivity.

G2. HOW TO CREATE AND MAINTAIN AN ETHICS-BASED BUSINESS ENVIRONMENT
JOHN HALL, CPA
Learn how to translate ethics policies into real everyday business behaviors. You’ll come away with actionable ideas to strengthen your business environment.

G3. BUSINESS TAX UPDATE
MARK SELLNER, CPA AND ANDREW SEIFERT, CPA
The Tax Cuts and Jobs Act (TCJA) has been in place for more than a year, and a clear picture of the business tax changes and issues is still developing. This session will provide an update on federal and state tax issues affecting middle-market, privately-held businesses. Tax planning opportunities will be discussed.

G4. EVERY DAY LEADERSHIP SKILLS THAT PRODUCE REAL RESULTS
LIZ URAM
Every day leadership is focused on helping managers create an environment where everyone is doing their best and focused on achieving goals of the team.

G5. SOCIAL MEDIA BASICS IN BUSINESS
MICHAEL QUINN
Stop wasting time and start maximizing revenue with your social media marketing. Learn what pitfalls to avoid with social media and how to get the right message in front of the right people at the right time. This presentation is designed to help you learn to use social media to effectively connect with people as a business. Social networks discussed include, but are not limited to: Facebook, Twitter, and LinkedIn.

THURSDAY, MAY 23 | 12:30 - 1:45

H1. PERSONAL PRIVACY
THOMAS STEPHENS, JR., CPA.CITP, CGMA
With much of our personal information collected and stored by others - sometimes without us even knowing about it - what can we do to help protect our privacy? Personal privacy is one of the biggest concerns of many individuals and organizations. Therefore, we should consider the implications of personal privacy at both levels. Take part in this session and learn valuable techniques that can help you identify what elements of your personal information are at risk. Perhaps more importantly, you learn what you can do to get back in control.

H2. FINANCIAL STATEMENT FRAUD: ISSUES, EXPOSURES & ANSWERS
JOHN HALL, CPA
Financial statement fraud led to one of the greatest financial crises in the U.S. In this session, learn what can go wrong, what it looks like, and what you can do about it. Tips for prevention, quick detection and efficient response will be provided, including action steps managers and auditors can use immediately on the job.

H3. HOW TO MANAGE AN OUTSOURCED TAX FUNCTION
MARK SELLNER & ANDREW SEIFERT
Many middle-market, privately-owned businesses outsource their business tax function rather than staff it internally. This interactive session addresses what it
takes to manage an outsourced tax function from both a member in industry and an outside service provider perspective. The costs and benefits of outsourcing income tax, sales tax and property tax functions is discussed.

**H4. COMMUNICATE LIKE A BOSS WITHOUT BEING BOSSY**  
**LIZ URAM**  
Effective communication starts with confidence. Studies show that leaders who communicate well are more likely to be happy, gain the respect of others, and have more time. Take charge of your future by learning which communication tools other top leaders use that have the biggest impact on you and the people around you.

**H5. THE 123’S OF FINANCING**  
**DAKOTA BUSINESS LENDING**  
Is your business growing or expanding and needing a loan to fund these activities? We’ll get into the details of different types of financing available, the types of information needed when applying for financing, what lenders look for and common gotcha’s from the lender’s perspective.

**THURSDAY, MAY 23 | 1:55 - 3:10**

**I1. POWER BI – BETTER REPORTING THE EASY WAY**  
**THOMAS STEPHENS, JR., CPA, CITP, CGMA**  
Created specifically to deliver real-time business intelligence, Power BI Desktop and Power BI Pro allow you to connect quickly to and summarize your financial and operational data. Moreover, these tools allow you to create stunning, dashboard-based visualizations of that data that you can share easily with other users. Furthermore, if you need to access your Power BI reports and dashboards from your mobile device, well, there’s a free app that lets you do that too!

**I2. HOW TO MANAGE FRAUD RISKS IN PROCUREMENT & CONTRACTING**  
**JOHN HALL, CPA**  
Learn the fraud risks inherent in procurement and contracting, and get solutions for guarding your organization against the costs and other negative consequences of procurement misconduct and fraud. Case examples highlight what can go wrong and what you can do about it in your own organization.

**I3. INDIVIDUAL TAX UPDATE**  
**MARK SELLNER, CPA AND ANDREW SEIFERT, CPA**  
An understanding of individual tax changes and issues is important for members in industry, both for their business owners and investors as well as for themselves. This session provides an update on federal and state tax issues affecting middle-market, privately-held business owners and investors. Tax planning opportunities are discussed.

**I4. THE POWER OF PERSONAL LEADERSHIP: 7 KEYS TO GO FROM ORDINARY TO EXTRAORDINARY**  
**LIZ URAM**  
Success is an Inside Job! What you say, what you do, and what you believe about yourself and others has a direct impact on your professional growth. Supported by inspiring stories of ordinary people who achieved extraordinary success, the presentation outlines 7 principles of success and how anyone can apply them.

**I5. MICROSOFT ONENOTE**  
**ED CRONIN**  
Microsoft® Office OneNote® 2016 provides a way for you to efficiently create and collect your notes in an electronic notebook. This presentation introduces you to using OneNote notebooks to store a wide variety of content in an organized structure, access the content from anywhere, and also share it with others. Additionally, learning how OneNote and the other applications in the suite are integrated increases your productivity with Microsoft Office.
Success, especially in today’s fast-changing business environment, depends on our ability to make creativity and innovation a continuous process. Leaders want to know how their teams can rise above any challenge and succeed no matter what comes their way. Whether it’s to embrace change, overcome obstacles, sustain growth, or take your success to the next level, they want to “Embrace the Shake”.

The term “Embrace the Shake” is coined from Artist Phil Hansen’s personal story of transformation. After developing a career-ending tremor in his drawing hand, Phil embraced his “shake” both physically and metaphorically by redefining his limitation as an impetus for creativity. Phil not only restored his artistic abilities, he became a much more creative and innovative artist than ever before. Upon sharing his message on the TED stage and millions subsequently after, “Embrace the Shake” has become a motto for many businesses to approach their limitations in a new way.

Phil’s powerful message of finding creativity within limitations will inspire you to stop looking on the outside, and start looking inside yourself for resources that can transform your challenges into opportunities for success. And like Phil’s art, “Embrace the shake” isn’t just a talk, it’s an experience! Through jaw-dropping visuals and LIVE interactive art, get ready to break preconceived assumptions, activate your creative capacity, and bring fresh ways of viewing the task at hand that will culminate with success.

Are you ready to Embrace your Shake?
Who should attend:
The ND CPA Society’s Members in Industry Committee develops this conference each year. You will find that it is of interest to both public and nonpublic CPAs as well as the business community in general. Anyone interested is welcome to attend.

CPE: 16 hours available

Electronic Handout Materials: A link will be sent to you to access the materials one week prior to the conference.

Fees include: Continental breakfasts, lunches and afternoon refreshments.

Comfortable Attire: Business casual is recommended. For your comfort, please dress in layers to accommodate typical variations in meeting room temperatures.

Hotel Information:
- Holiday Inn
- 3803 13th Avenue South
- Fargo, ND 58103
- (701) 282-2700
- Toll Free Reservations: 877-282-2700

Room Reservations: Please make your room reservations by April 23, to ensure availability. Mention the conference for a discounted rate of $120/night.

Cancellation and Refunds: Full refund if received 10 working days prior to conference. A $50 administrative fee is charged if canceling less than 10 working days before conference. No refunds after May 17. Exceptions considered on a case by case basis.

NASBA Categories: The ND CPA Society is not a member of the NASBA registry. However, for a list of our sessions and their appropriate NASBA category, please visit www.ndcpas.org/mgmtdescrp/

Conference Details

Monday Reception
Join us for a short social on Monday following the conference sessions. Take this chance to relax, make dinner plans and network with other attendees and speakers. The first drink is on us!
WEDNESDAY, MAY 22

8:00 A. Market Disruption: Where Innovation and Negotiation Intersect
2:10 D1. Sales Tax Compliance D2. Self-Perception, Misconcept D3. Finance to Non Accountants
3:45 E. A Different Kind of Different

THURSDAY, MAY 23

8:00 F. Deadliest Catch: Don’t Be Another Fish in the Dark ’Net
3:30 J. Embrace the Shake

FEES:
Add $50 if postmarked after May 8

- $375 Society Member
- $425 Nonmember
- $325 One day Society member
- $375 One day nonmember

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THE ART OF MODERN MANAGEMENT

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