Business Learning Institute

Customized Learning Solutions
2012 - 2013

Seminars • On-Site Training • Webcasts
Keynote Speakers • Facilitation • Consulting

Business Learning Institute℠
Knowledge. Innovation. Leadership. An affiliate of MA CPA.

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About this catalog: All courses in this catalog are listed alphabetically and by subject.

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- Consulting
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- Team Building
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About BLI

ABOUT BLI

The Business Learning Institute (BLI) exists to help business leaders and their companies succeed. It provides a center of learning that strives to develop competencies, facilitate networking and share strategic knowledge.

Businesses, government, non-profit organizations and other entities in search of strategic, executive leadership are all served by the offerings of BLI.

The Business Learning Institute offers over 250 programs in many formats; including on-site training, consulting, keynote speakers, webcasts and other resources.

Our mission is to deliver competency-based courses, content and community that will enhance learning and foster organizational and executive leadership.

To learn more about BLI or schedule a meeting to find out more about what we offer – such as a customized solution for your training needs – e-mail Pamela Devine, pam@bizlearning.net or call 443-632-2321, or Laura Dorsey-Shaner, laura@bizlearning.net or call 443-632-2334.

THE BLI CURRICULA - FIVE CRITICAL SKILL AREAS

Today's business environment demands the need to gain competencies and share strategic knowledge. BLI delivers competency-based curriculum, courses, content, and community to enhance learning and grow intellectual capital for organizational and executive leadership.

These soft skills are essentially people skills – the non-technical, intangible, performance skills that determine your strengths as a leader, manager, and team member. They are a critical component of intellectual capital and include categories like strategic management, business management, performance management, leadership development, and communications skills.

Strategic Management - Strategic conversation reflects the dynamics between the organization and its environment. The closer the language is to current and potential customer dynamics, the higher the company's profit potential.

Business Management - As the business world moves at an incredible pace, keeping up is key to its success. Today's financial managers must be able to translate strategy into operational and corporate growth.

Performance Measures / Management - Executives and managers must effectively transform their firms or companies into high performance organizations. First, they have to identify and develop the appropriate core competencies and skills, and then figure out how to link them to their business strategies. At every step, seemingly simply but often elusive performance measures are crucial to staying on course.

Leadership Development – Great leadership is one of the most valued of all human activities. Modern myth holds that "leaders are born, not made," and then only for the exclusive few. On the contrary, leadership is a set of observable and learnable practices. It is the process ordinary people use when they bring out the best in others and themselves.

Communications Skills - The ability to communicate well is a necessity in life. Until recently it was an extremely underrated skill in business, but that has changed. Not only writing and speaking, but body language, tone and presentation is used to communicate. With advanced technology, we now have numerous new avenues of expressing ourselves, and we need to improve our ability to communicate well in order to form and maintain good relationships.

This catalog lists programs and course descriptions that fall under the curricula that have been identified as critical skills for managers, partners, CEOs and other strategy makers.

It describes BLI programs in all the above areas, taught by top-notch instructors with outstanding track records. Many of our BLI instructors are available as keynote speakers as well. These courses can also be brought on-site through our Customized Learning Solutions business model. To access program descriptions via the website go to www.bizlearning.net/CLS and click on the icon to SEARCH the customized Training Catalog.

Technical Expertise - In addition to the five critical skill areas highlighted above, specialized or higher level technical-type programs, as opposed to soft-skill programs, are also available through BLI.

Vendors interested in having their products or services listed in the BLI catalog should contact Deborah Zizwarek, Debbie@bizlearning.net or call (443) 632-2322.

Please note that many programs in this catalog may be available in Webcasts. Contact a BLI Customized Learning consultant if you are interested in a Webcast.

The BLI tornado symbol is a registered trademark of the Business Learning Institute

BLI GENERAL POLICIES:

Program Selection: All programs featured in this catalog are available for customized on-site training.

Course Minimums: There is a 10 person minimum attendance required for all on-site training programs, unless other arrangements have been agreed upon by BLI.

CPE Credit: BLI will clearly note the amount of Recommended CPE credit for each course. Final approval for CPE credit for all courses is dependent upon your state board of public accountancy.

Invoicing: BLI will submit an invoice for payment within 10 days of the program completion. Full payment will be due within 30 days of receipt of invoice.

Manuals: BLI manuals will be printed by the Business Learning Institute. An electronic document can be provided for clients who prefer to print their own manuals. The selling or re-use of BLI manuals is prohibited.

Program Evaluations: Attendee evaluation forms are provided by BLI. We strongly urge each attendee to complete the form. The results assist us in determining the quality of the event and the effectiveness of the speaker(s), and help to ensure that the mandatory educational requirements have been met.

ADMINISTRATIVE:

Attendance Verification: BLI will mail the participant certificates to the firm / company upon receipt of the participant roster.

Cancellations / Refund Policy: Please notify us as soon as you know a program will need to be cancelled, or at least 10 days in advance. An administrative fee may be applied for cancellations with less than 10 days notice. If instructor travel arrangements have previously been made, BLI will cancel those arrangements and attempt to garner a refund; however, if we cannot get a refund due to insufficient notice, you will be responsible for incurred travel costs. You will be invoiced for any course materials printed.

Course Cancellation: BLI reserves the right to cancel a course 10 days prior to the program date. BLI will be responsible for travel expenses due to cancellation under these circumstances. BLI will make every effort to assist in the rescheduling of the program.

CPE Credits Reconciliation: BLI will reconcile the actual CPE credits earned based on the participant roster received from the program sponsor. Final reconciled CPE credits earned are then applied to each participant's record, and a final CPE Certificate of Completion is issued.

CPE Record Keeping: BLI retains the following records for a minimum of five years: (1) program outline / materials; (2) records of participation; (3) date(s) and location(s) of presentation(s) or period during which program was available for purchase; (4) number of credits earned by participants; (5) results of program evaluations; (6) instructors, discussion leaders or program authors' names and credentials.

Conflict Resolution: For more information regarding BLI administrative policies or conflict resolution, please contact Laura Dorsey-Shaner at (888) 481-3500, by e-mail to laura@bizlearning.net, or you may mail to:

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Towson, MD 21204

Disclaimer: The information and suggestions presented at the classes, seminars and other programs sponsored by BLI are subject to constant change, and therefore should serve only as a foundation for further investigation and study. Any forms presented at such classes, seminars or programs are samples only and are not necessarily authoritative. All information, procedures and forms contained or used in such classes, seminars, or programs should be very carefully reviewed and should serve only as a guide for use in specific situations. The opinions expressed by discussion leaders and discussion panelists are their own and are not necessarily those of the BLI.

The Business Learning Institute, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

New 2011 Programs

Alphabetical Listing

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Alphabetical Listing

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Alphabetical Listing

Listing by Subject

Accounting

Audit

Balanced Scorecard

Business Development

Business Valuation

Business Writing

Career

Cash Management

Change Management

Coaching & Counseling

Codification

Communication Skills / Communications

Conflict Management

Consulting

Controllership

Corporate Finance

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Sarbanes Oxley / SOX

Strategic & Critical Thinking

Strategic / Business Planning

Team Building

Listing by Subject

Time Management

Trust

Women’s Issues

KARL AHLRICHS, SPHR

In a world of specialists, Karl Ahlrichs is first and foremost a Human Resource consultant and hiring process expert, but also has significant experience in a wide range of business roles.

People think Karl has been everywhere. He has run a career center in the swamps of Lake Charles, Louisiana, another in Appalachia, and helped restructure Apple computer in Silicon Valley. He has directed videos in Chicago, marketed software in Orlando, and launched an office of Right Management Consultants in San Diego.

He has presented complex subjects to tough audiences for decades, and enjoys the challenge of customizing his material for diverse audiences. He is an entertaining business generalist. He is in demand as a keynote presenter to conferences and organizational events, and can both entertain in a keynote environment, or as a trainer in an adult learning model.

He is very involved in the Society of Human Resource Management, having acted as conference chair for the Indiana State SHRM Conference, and has presented at 6 consecutive National SHRM Conferences. He is currently enrolled in Butler's MBA program, and is learning the language of finance. Karl is an SPHR (Senior Professional, Human Resources), is qualified to administer many assessment tools, and has a background with hiring, training, communications and writing as a focal point.

MECA	Applying "Lean" Thinking to Making Employees Your Competitive Advantage
BBWH	Beyond the Buzzwords with Hiring: Apply "Lean" Processes and Fix the Way Your Organization Hires
TITB	CFO versus HR - Thinking Inside the Box
FIX	Finally Fixing Performance Management Using New Tools
IRP	Hire the Lucky Ones - How to Improve Retention and Productivity by Selecting Fortunate Employees
MMG	Managing Multiple Generations: Next Steps and New Surprises (Available as a keynote) new
GRUMP	The New Workforce - New Data, New Ideas, Aging Baby Boomers

RONALD BAKER, CPA

Ronald J. Baker started his accounting career in 1984 with KPMG Peat Marwick's Private Business Advisory Services in San Francisco. Today, he is the founder of VeraSage Institute, a think tank dedicated to teaching Value Pricing to professionals around the world.

As a frequent speaker at CPA events and conferences and a consultant to CPA firms on implementing Total Quality Service and Value Pricing, his work takes him around the world. He has been an instructor with the California CPA Education Foundation since 1995 and has authored fifteen courses for them.

Ron is the author of the best-selling marketing book ever written specifically for the CPA profession, "Professional's Guide to Value Pricing, Sixth Edition," published by CCH, Incorporated. He is also the author of, "Burying the Billable Hour," "Trashing the Timesheet" and "You Are Your Customer List," published by The Association of Chartered Certified Accountants in the United Kingdom. His most recent book, "The Firm of the Future: A Guide for Accountants, Lawyers, and Other Professional Services," co-authored with Paul Dunn, was published in April 2003 by John Wiley & Sons, Inc Ron has been appointed to the AICPA's Group of One Hundred, a think tank of leaders to address the future of the profession, named on Accounting Today's 2001, 2002, 2003 and 2004 Top 100 Most Influential People in the profession, and in 2004 received the 2003 Award for Instructor Excellence from the California CPA Education Foundation.

He graduated in 1984 from San Francisco State University with a bachelor of science degree in accounting and a minor in economics. He is a graduate of Disney University, Cato University and the University of Chicago Graduate School of Business course, "Pricing: Strategy and Tactics." He is a member of the Professional Pricing Society and presently resides in Petaluma, California.

BBBYSR	The Best Business Books Ever Written
BOFI	The Business of the Future (for Industry)
EECON	Everyday Economics
EVRYDAY	Everyday Ethics: Doing Well and Doing Good new
MWMTC	Measure What Matters to Customers: Using Key Predictive Indicators
POPI	Pricing on Purpose (for Industry)
SPRETRET	Sole Proprietor's Retreat
CLUE	Success Leaves Clues: Career Strategies for New Professionals
WDDEC	When Debits Don't Equal Credits (for Professionals and Industry)

About Our Instructors

JAHN BALLARD

JW 'Jahn' Ballard, Principal of Performance Management Institute, Inc., a firm that uses the Financial Scoreboard and Dashboard as tools for creating financial measurement and reporting systems linked to operating plans for small and medium-sized businesses and business units. He also trains CFO's, Controllers and CPA's in Executive Finance and cash flow-focused business literacy for CPA societies and the Institute of Management Accounting.

BGCF	Executive Finance for Operating Leaders: Relating Numbers and Metrics to Reality

ANIRBAN BASU, J.D.

Mr. Anirban Basu is Chairman & CEO of Sage Policy Group, Inc., and is one of the mid-Atlantic region's most recognizable economists. Mr. Basu has been active in the areas of real estate economics, economic development and economic forecasting. He has conducted numerous economic and fiscal impact analyses, conducted seminars on the economy, and has authored a number of high profile economic development strategies. Mr. Basu is also a Senior Lecturer at Towson University, and is host of the Maryland Economic Forecast radio spot on Baltimore's WYPR.

Mr. Basu holds a B.S. in Foreign Service from Georgetown University. He earned his master's in public policy from Harvard University's John F. Kennedy School of Government in 1992. He earned his master's in economics at University of Maryland, College Park in 1998. His J.D. from the University of Maryland School of Law was obtained in 2003.

EU	Economic Update: After the Recession, and Maybe Before
FAEOF	Fourth Annual First Friday Economic Outlook Forum - 2011 (4-hour Webcast) new

SHEILA BIRNBACH

Birnbach Success Solutions (formerly G B Associates, Inc.) has become one of the foremost consulting firms enabling organizations and individuals achieve peak performance. Birnbach Success Solutions works with small- and mid-size organizations to enable them to attract and retain great employees, offer superior customer service that sets them apart from their competitors and build cohesive teams.

Sheila holds an M.B.A. in Personnel and Industrial Relations from the American University and an M.S.W. from the University of Maryland. She is a licensed clinical social worker and worked for more than 6 years as a family therapist in a juvenile court. She was named one of the "Outstanding Young Women of America" in 1980.

Sheila's combination of first-hand management experience, 30 years as a consultant to a variety of organizations and more than 10 years experience as a family therapist have qualified her as a leading coach to executives and business owners who desire to excel in a competitive, challenging environment and realize their deepest visions.

Sheila has served on the faculty of the United States Chamber of Commerce's Institute for Organization Management for 25 years. She has authored numerous articles and has been quoted in several professional journals and newsletters.

She ahs been involved with the Society of Human Resource Management (SHRM), the National Association of Social Workers (NASW) and the Rockville, MD Chamber of Commerce.

All courses are new

GENDIF	Are Generational Differences Helping or Hindering Your Team?
CRW	Creating a Respectful Workplace
CANDO	Delivering Credibility on the Phone – Conveying a "Can Do!" Attitude
HIREFIRE	Hiring, Firing and Everything in Between
SCMC	Strengthening Collaboration and Managing Conflict
TERM	To Terminate or Not to Terminate: That is the Question
TRANLEAD	Transitions to Leadership
DISASTER	When Disaster Strikes, Will You Be Ready?
WTC	Wrongful Termination Claims are on the Rise - Are You Protected?

JUDITH BORSHER, CPA, MBA, CITP, MS CERTIFIED TRAINER

Judy Borsher is the principal of SCG Training and Consulting Corporation, a technology firm creating and presenting instructor-led training programs and providing consulting and programming services to help organizations attain core competencies in technology skills as well as achieve financial reporting results. She also is a national presenter of SCG's technology CPE programs for the accounting community and since 1987 has delivered more than 1,700 technology lectures with consistently high ratings.

Prior to establishing SCG, Judy worked for KPMG in Washington DC with a focus on small business information systems, in nonprofit CFO positions and also with a national training company under contract with IBM and AT&T where she developed, managed and presented technology training programs.

Judy served on the Computer Training Committee of the MACPA and was instrumental in establishing the hands-on computer training program which has been meeting technology needs of members since 1987.

Judy has been a featured speaker at the Maryland Association of CPAs Technology Conference for the past 16 years; a presenter at the AICPA Technology Conference; and a presenter at Virginia Society of CPAs and Greater Washington Society of CPAs conferences. Certifications include: Certified Public Accountant ; Certified Information Technology Professional (AICPA); Microsoft Certified Professional; and Microsoft Certified Trainer.

Judy is a member in good standing of the American Institute of CPAs, the Greater Washington Society of CPAs, the Virginia Society of CPAs and the Maryland Association of CPAs. She serves in numerous nonprofit volunteer leadership roles for both church and community organizations. Judy holds a B.A. from Cornell University and an MBA degree from the Johnson Graduate School of Management at Cornell University.

ADOBE-L	Adobe Acrobat Best Features, Forms and Tips for Accountants
CLOUD	Cloud Computing Unraveled – Issues and Trends Update new
EXCELA-L	Excel (2007 & 2010) Advanced Productivity Features, Pivot Tables and Macro Recorder Tips
EXCELC-L	Excel (2007 & 2010) New Charts, Graphs and Diagrams Features
EXCELPT	Excel (2007 & 2010) Pivot Tables in-depth Data Analysis Functions & Tips
EXCELM-L	Excel (2007 & 2010) Power User: Macro Programming using Visual Basic for Applications
EXCELA2	Excel (2007 & 2010) Reporting Tools and Security Features
EXCEL-L	Excel (2007 & 2010) Worksheets Refresher and New Features
OFADBWIN	Excel + Outlook + Word + Adobe Acrobat + Windows 7-Best Practices for CPAs new
EXWDADOB	Excel + Word + Adobe Acrobat Features and Productivity Tips
OFFIC07L	Microsoft Office 2007 Update and Windows 7 Tips
OFFIC10	Microsoft Office 2010 New Features Update with an Emphasis on Excel 2010
PROJECT	Microsoft Project 2010 Level 1 new
OUTLK-L	Outlook 2010 Update and Best Practices for CPAs
BGRAPHIC	PowerPoint (2007 & 2010): Creating Dynamic Financial Presentations with Business Graphics
PSW	Presentation Skills Workshop
SOCIAL-L	Social Media for Accountants – Tools and Strategy new
WORD-L	Word (2007 & 2010) and PDF Productivity Features for CPAs

GARY BULMASH, CPA

Dr. Gary Bulmash, CPA, is currently a teaching professor at the Robert H. Smith School of Business, University of Maryland. He is also an emeritus faculty member of American University in Washington, D.C. He regularly conducts professional education seminars for AICPA and various state CPA societies as well as in-house programs for CPA firms. He has been recognized as outstanding discussion leader by the Maryland Association of CPAs and the Greater Washington Society of CPAs. In addition, he has written continuing education materials for the AICPA.

ETH	Ethics
IFRSB	International Financial Reporting Standards (IFRS)

About Our Instructors

GREG CONDERACCI, SENIOR FELLOW, BUSINESS LEARNING INSTITUTE, INC.

For more than four decades, Greg Conderacci has been using the magic of communication to help people lead happier, more productive and more rewarding lives.

A Senior Fellow with the Business Learning Institute, he is a marketing consultant specializing in helping professional and financial services firms answer clients' key questions like: "Why should I trust you?" "Why should I do business with you?" and, "How are you any different from the rest?"

At BLI, his training focuses on key success skills like ethics, leadership, business development, communication, and even time/personal energy management. He also teaches marketing at the Johns Hopkins University Carey Business School.

In the 1990s, Greg was Director of Marketing for Price Waterhouse's information technology consulting practice in the Mid-Atlantic, Mid-Atlantic Vice President of Sales and Marketing for Prudential's managed care operations, and Chief Marketing Officer for Alex. Brown (America's Oldest Investment Bank). Most recently, he was Director of Marketing for Deutsche Bank Alex. Brown, responsible for marketing strategy, marketing materials creation and design, and sales force coaching and training.

In the 1980s, he created and marketed several innovative programs for the poor of Maryland, including the state's largest soup kitchen (it's where the Pope eats when he comes to Baltimore). In the 1970s, as a reporter for The Wall Street Journal, Greg covered business in Detroit (mostly autos) and also wrote economics out of Washington.

A magna cum laude graduate of Princeton University, he was Editor-in-Chief of The Daily Princetonian; he also holds a Masters in Public Policy from Harvard University. A registered representative and registered principal, he has completed the Securities Industry Institute at the Wharton School of the University of Pennsylvania. For his age, he is a fairly decent ultra-long-distance bicycle rider.

FALTT	At the Helm in the Storm: Seven Survival Strategies for Leaders in Turbulent Times
BECCI	Beyond Ethics: Confronting the Challenge of Integrity new
BUZZ	Build Your Book of Business with Better Brand Buzz
DMBD	Business Development: Distinctions Between Marketing and Sales (1-hour Webcast) new
TDBL	Caesar's Wife: Tipping the Delicate Balance of Leadership and Ethics (Available as a 4-hour Webcast)
COT8	Champions of Trust
CREATE	Creating Creativity: Outside - Outside the Box
FINDND	Find a Need and Fill It: Your Key to Business Development (Available as a 2-hour Webcast)
WHO	Finding Your Way Through Career Transitions
FSSF	Five Smooth Stones - Facing Goliath and Winning
SDSS	From Slow Death to Sweet Success: Seven Survival Strategies
GTOG	Great to Good? Using the Lessons of Good to Great AND How the Mighty Fall
IMPROV	Leadership Improv - Why "Fake It Until You Make It" Works
LIO	Leadership Inside Out: Discovering the Leader Within
LISTEN	Listening For Leaders: Ask the Question, Discover the Need, Win the Trust
MAGYV	MacGyvering: The Art of Being Resourceful in a Crisis (Available as a 2-hour Webcast)
GOODGRN	On Good Ground: Creating A Personal Strategy for a Great Life
HEO	Performance, Productivity and Profit: Creating the Higher Energy Organization
UPSS	Selling for CPAs: Using Your Problem-Solving Skills to Promote Profitable Business Growth
SEVEN	Seven Secrets of Successful Business Writing new
BDCAMP	Turning Trust into Value: Business Development Boot Camp
INVENT	What Next? Inventing a New Niche for Yourself
21CNEG	Why Don't We Say Yes? 21st Century Negotiating new
STRAY	Why We Stray: A Different Look at Ethical Decision-Making
WHAT	Why You? Positioning Yourself Ahead of the Pack

ROBERT "HAP" COOPER

Robert "Hap" Cooper is the President and co-founder of Prospect Street Consulting, a research, consulting and training firm that works to make professional service organizations more productive.

Prior to becoming a consultant, Hap spent 15 years in a number of sales and management positions with several financial service firms, including Alex Brown and Mutual of Omaha. Before entering the financial services arena, Hap was an Army Intelligence Officer in Berlin, Germany and a graduate of Princeton University.

Hap is a prolific writer and speaker as well as a regular lecturer at the Columbia University and Johns Hopkins Schools of Business. He also teaches Client Skills at Penn State's Smeal School of Business in Philadelphia.

ENERGY	High Performance Time Management: Boosting Your Personal Energy (Also available as a 2-hour webcast)
POWPRE	Producing Powerful Presentations: Performance and Profit
MINDB	Reading Clients Minds and Understanding How They're Reading Yours
DNA	Winning New Business - It's in the DNA

JEAN CUNNINGHAM

Jean Cunningham is co-author of Real Numbers: Management Accounting in a Lean Organization, 2004 Shingo Prize for Research recipient. Cunningham serves a number of clients with business strategy, process improvement, and growth and acquisition planning through out the U.S. She is the former Chief Financial Officer and Vice President of Company Services, responsible for Accounting, Human Resources, Information Systems and Telecommunications at both Lantech, LLC and Marshfield DoorSystems, Inc. Most recently, Cunningham authored her second book, Easier, Simpler, Faster; System Strategy for Lean IT, published by Productivity Press.

ICCL Improve Cash Collections With Lean
LHR Lean and Human Resources (HR)
ODM Operational Decision Making with Lean Accounting
RNLA Real Numbers Through Lean Accounting (2-hour Webcast)

ANTHONY "TONY" CUOZZO, CPA, CGFM

Tony is a Senior Vice President and Not-for-Profit Technical Principal with Councilor, Buchanan & Mitchell, P.C. (CBM). He has over 35 years of experience serving a variety of clients, including specialties in not-for-profit organizations and local governments. Tony currently serves as the principal in charge of both 501(c)(3) and 501(c)(6) organizations.

In addition, Tony is the Co-Chairman of CBM's Not-for-Profit Committee and is also a nationally recognized discussion leader for various accounting courses for CPA firms and various state CPA organizations. These teaching assignments keep him abreast of new developments in the accounting profession as well as in business.

Tony has conducted peer reviews of CPA firms across the country, and is a former member of the SEC Practice Section's Peer Review Committee of the AICPA's Division for firms.

His broad business experience and training has enabled him to be recognized as a registered investment advisor by the Financial Industry Regulatory Association.

NAVAASTD Navigating the New Accounting and Auditing Standards new
LEASACCT Proposed Lease Accounting -How Do You Run an Airline Without Airplanes? new

MICHAEL DAIGNEAULT, ESQ., SENIOR FELLOW, BUSINESS LEARNING INSTITUTE, INC.

Michael Daigneault, Esq.is an experienced consultant and trainer. He is frequently asked to counsel nonprofit boards concerning vital governance challenges, and has particular experience working with nonprofit boards and chief executives on leadership, ethics, and strategic issues.

Based in the Washington, DC area, Michael has worked with Independent Sector, the Corporation for Public Broadcasting, the Association of International Educators (NAFSA), the College of American Pathologists, the International Baccalaureate, NISH, the LAM Foundation, and many others.

Michael also works with BoardSource's corporate clients such as Time Warner and Target to develop cutting edge community involvement, philanthropic, and leadership development programs centered on the training of their executives and employees to more effectively sit on nonprofit boards.

In addition to his work with BoardSource, Michael is also a Senior Fellow with The Business Learning Institute (BLI), a MACPA affiliate that focuses on higher learning for leaders, strategists, and managers in the business and financial fields. He is also a member of the United Way of America's Membership Appeals Panel. Previously, Michael served as the ethics officer for the United Way of the National Capital Area. He also has hands-on experience in successfully running both for-profit and nonprofit institutions having some 20+ years' experience as President of the Ethics Resource Center, the Executive Director of the American Inns of Court Foundation, and the President of Ethics, Inc. He has published numerous articles on these topics for a wide variety of periodicals, journals, and magazines.

Michael graduated first in his class in Philosophy from Georgetown University College of Arts and Sciences in 1981. He graduated from Georgetown Law Center with a JD in Law and holds a Masters in Law with a concentration in Ethics and Professional Responsibility from Georgetown University Law Center.

CELT A Matter of Integrity
FCAS Advanced Consulting for CPAs: Enhancing and Expanding Your Client Relationships
NPG A Commitment to Community: Nonprofit Board Service and CPAs

About Our Instructors

BRAD DAVIDSON

Brad Davidson is President of SPARDATA Business Valuation Experts of Elkridge Maryland and is a recognized expert in the valuations field. Organizations which have invited Davidson to lecture include the Internal Revenue Service, the Securities and Exchange Commission, the North American Securities Administrators Association, the Department of Labor, the Federal Financial Institution Examination Council, the Federal Reserve, the Michigan Bankers Association, the Virginia Bankers Association and the American Society of Pension Actuaries. SPARDATA has been cited on numerous occasions by the Wall Street Journal, the Washington Post and other publications.

In 1990, Davidson became president of SPARDATA, a firm with experience valuing over 27,000 privately-held businesses. The firm's clients include business owners; the advisors serving them (including financial advisors, trust officers, CPAs and attorneys) and government institutions.

In 1979 Davidson enlisted in the Maryland Army National Guard and was ordered to Ft. Sill OK for basic training. (Later he attended Officer Candidate School, was commissioned an infantry officer and retired in the late 1980s having achieved the rank of Captain in the United States Army Reserve.) Two years later Davidson became the "boy wonder" of Annapolis politics by becoming the youngest person ever elected to the Annapolis City Council; he was reelected without opposition in 1985. In 1987 Governor William Donald Schaefer appointed him Chairman of the State Commission on the Capital City, a position he held until 1996.

Today Davidson serves on the boards of St. John's College of Annapolis Maryland and Santa Fe New Mexico; the Historic Annapolis Foundation and the J. M. Kaplan fund in New York City.

SSVS	Business Valuations in a SSVS* World *(*Statement on Standards for Valuation Services)*
LOYAL	Using Business Valuations to Keep Your Clients Loyal

R. DONALD MCDANIEL

Don McDaniel is a founder, and President and CEO of Sage Growth Partners (SGP), a health care strategy and technology firm specializing in creating value for organizations in the health care industry and related industries. McDaniel is also a member of the faculty of the Carey Business School of the Johns Hopkins University, teaching health economics and competitive strategy. Prior to his role at SGP, McDaniel has held a series of leadership positions with a variety of health care, technology and insurance organizations, and has served on a number of proprietary and not-for-profit boards.

BOI	Blue Ocean Innovation: Market-Taker to Market-Maker (2-hour Webcast)
EHRIIS	The Economics of Health Reform: Implications for Industry & Society (2-hour Webcast)

JENNIFER ELDER, CPA

Jennifer Elder is a CPA, CMA, CIA, CFF with a Master's in Organizational Leadership. She has worked in accounting and finance for the past 25 years in a variety of industries including manufacturing, residential construction and development, and angel investing. She spent five years in public accounting, seven years as the Accounting Department Chair of a community college, and the previous ten years in the role of CFO. Recently, Jennifer started her own business, The Sustainable CFO, providing business consulting, on-demand CFO services, and business coaching services. Their target market is small and medium-sized businesses looking to improve their bottom-line and overall performance. In addition Jennifer teaches finance in the Green MBA program at Antioch University New England. She is also a contributing writer for the National Association of Home Builders and TriplePundit, and a frequent presenter for the Maryland Association of CPA's, the Institute of Management Accountants, and the Society for Human Resource Management.

All courses are new

AWESOME	Awesome Financial Presentations
BACKCAST	Better Forecasting Using Backcasting
FSA	Financial Statements Analysis
FRAUD	Fraud: Detection and Prevention
LIONS	Lions, and Tigers, and Numbers Oh My! FInance for the Non-Financial Manager
PERSTYLE	Personality Styles in the Workplace
BALSCORE	Planning and Implementing the Balanced Scorecard
WINPLAN	Preparing a Winning Business Plan
RMDRP	Risk Management - Disaster Recovery Planning
SMART	Smarter Decision-Making
SUCSPROJ	Successful Project Approval Using a Business Case
SR	Sustainability Reporting
TRIPLE	Sustainability: Using the "Triple Bottom Line" to Increase Your Success

ELIZABETH GANTNIER, CPA

Elizabeth S. Gantnier is a Certified Public Accountant and Director of Quality Control for Stegman & Company of Baltimore MD. She is a former Vice President - Finance for a publicly held manufacturing firm in Chesapeake Virginia after having spent ten years with KPMG in the Richmond, VA and Norfolk, VA offices where she was a statistical audit specialist, in-house professional development instructor, and EDP specialist.

Ms. Gantnier is a national instructor for the AICPA on topics including fraud, accounting and auditing as well as SEC related topics and internal control. Additionally, she has been a nationally recognized CPA Review instructor. Ms. Gantnier is a frequent panelist in the national AICPA continuing education videos on SEC Reporting, Forensic Accounting and Understanding the New Statements on Auditing Standards as well as the quarterly SEC Update Webcasts. She is a member of the PCAOB's Standing Advisory Group and the Center for Audit Quality's Professional Practice Executive Committee.

Ms. Gantnier has expertise with audits of publicly held companies, governments and construction contractors, financial institutions, manufacturers, employee benefit plans and not-for-profit entities. She is the author of the AICPA's programs on benchmarking, inventory valuation, auditing in a paperless society and auditing electronic evidence.

Ms. Gantnier was recently a recipient of the 2009 AICPA Outstanding Discussion Leader award.

AAUI	Annual Accounting Update for Industry
LGAA	Customized Annual Update for Accountants and Auditors

EMMANUEL GOBILLOT

Recognized as one of Europe's most sought after and engaging business speakers, Emmanuel has made a name for himself challenging the most conference weary of audiences.

Delivering high-paced, engaging, entertaining and thought-provoking speeches is what all conferences, events and workshops organizers ask of their speakers. If you want a guarantee that Emmanuel delivers all these characteristics please visit our contact page, we can put you in touch with satisfied clients.<p>

But be warned: with satisfaction ratings from audiences averaging 90% of highly satisfied you may just find that one speech is only the beginning! To find out more visit www.emmanuelgobillot.com

LSHIFT	Goodbye Leadership. Hello Leadershift! (1-hour Webcast)

CAROL HAISLIP

During her years in the corporate world as a vice president for a major corporation, Carol Haislip, Director, interviewed thousands of prospective employees. She knows firsthand that first impressions really do last a lifetime. Through her dynamic teaching techniques, she illustrates that an effective professional image is critical for success on the job, in school or in any other social or business environment. Ms. Haislip holds a Masters of Business Administration with a concentration in International Business.

BBW	Better Business Writing
BDE	Business Dining Etiquette
MPI	Maintaining a Professional Image in a Business Casual World
MP	Mingling for Professionals (Mingle, Mingle)
PCBE	Professionalism, Civility and Business Etiquette

CATHLEEN HANSON

Cathleen Hanson, Director of the International School of Protocol, is an award winning writer whose syndicated columns appear in over 30 publications nationwide. Ms. Hanson served as a university professor of communication, teaching courses in the areas of public speaking, business communication, interpersonal communication, group communication, and nonverbal communication. As a fully engaging top-notch teacher, her emphasis is on teaching adults, teens and children what she considers to be skills for life. Ms. Hanson holds a Masters in Communication Theory.

BBW	Better Business Writing
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About Our Instructors

J. THOMAS HOOD, III, CPA, CITP

Tom Hood is the CEO & Executive Director of the Maryland Association of CPAs, and the founder and CEO of the Business Learning Institute (BLI) – a center for the development of leadership skills for CPAs. Tom is a nationally known author, speaker, and consultant recognized repeatedly as one of the Top 100 Most Influential CPAs by Accounting Today magazine. He also received the AICPA Special Recognition Award for his contributions to the profession in leading the CPA Vision Project. It was during the CPA Vision Project process that Tom became hooked on strategic planning and facilitation. Managing the first ever "vision" for a profession, he led the effort that involved over 3,500 CPAs in all 50 states. Since then he has facilitated almost every major national committee and CPA firms from all over the US, as well as corporations and non-profits

Tom has taken the CPA profession by storm with his innovative uses of technology at the Maryland Association of CPAs. From the virtual world of Second Life to social media tools like Blogs, Twitter, Linked-In, and Facebook, Tom and his team at the MACPA are using these tools to communicate with students, members, and the public. Tom and his team are teaching CPAs about the power of these tools to keep them ahead of the curve in today's rapidly changing environment. Tom and the MACPA have been featured in the Journal of Accountancy, Accounting Today magazine, Rain Today Magazine, and Accounting Web

He was nominated by his peers to serve as the President of the CPA/SEA (CPA State executives Association) for 2008 - 2009. He serves on the Board of Directors of the Shared Services, LLC and is Co-Chair of the Board of the State Societies Network, Inc. Tom is an active volunteer in the CPA Profession serving on the AICPA CPE Advisory Committee and has served on several key national committees - the AICPA Enhanced Business Reporting Committee and AICPA Special Committee on Mobility.

Hood has experience as a high level executive in industry, specifically as treasurer and CFO of Bryn Awel Corporation, a privately owned $75 million highway construction company. He is a graduate of Loyola College (B.A. in Accounting) and has a Master's in Finance (Real Estate) from Johns Hopkins University and a Master's equivalent in Information Systems from the University of Baltimore. Most recently he obtained the Certified Information Technology Professional (CITP) certification from the AICPA.

CSM	CPAs and Social Media: Passing Fad or Valuable Tool? (2-hour Webcast)
I2A	I2A: Strategic Thinking that takes Insights to Actions new
PIU	Professional Issues Update
SOCMED	Social Media Strategy & Quick Start: Developing and Implementing a Social Media Strategy for CPA Firms & Organizations
SPF	Strategic Planning Facilitation: Developing the High Performance Organization

MARK JANKOWSKI

Mark Jankowski co-founded Shapiro Negotiations Institute (SNI) in 1995 to help individuals and organizations realize their fullest potential by building stronger relationships and improving their Negotiation and Influencing skills. Drawing on his experiences as an attorney, investment banker, sales manager, and entrepreneur, Mark empowers clients to connect SNI's systematic approach to Negotiation and Influencing to their real life endeavors.

As an expert on Negotiation and Influencing, Mark has lectured at the Wharton School of Business at the University of Pennsylvania, Case Western Reserve University, and Johns Hopkins University. Over the past 15 years as President of SNI, Mark has developed highly customized training programs for a wide variety of public and private organizations in the Financial Services, Insurance, Entertainment, Telecommunications, Automotive, and Health Care industries, just to name a few. Mark's tenure at SNI has been highlighted by extensive programming delivered on six continents and in 15 countries.

Mark graduated with a Bachelor of Arts degree (magna cum laude) from Harvard University, and he received a J.D. from the University of Virginia School of Law where he was a member of the University of Virginia Law Review. He is also a member of the Mensa Society for intellectual exchange.

In his community, Mark is a co-founder of "Hands on Baltimore," which matches young adult volunteers with charities throughout the Baltimore area. He has also served on the Board of the Living Classrooms Foundation, which focuses on providing entrepreneurial alternatives for inner-city residents. Mark was also on the Board of the University of Maryland Medical Center, where he helped to raise over $750,000.

INFL	The Power to Influence and Connect

MICHAEL KRATEN, PHD

Michael Kraten is an Assistant Professor of Accounting at the Sawyer Business School at Suffolk University in Boston, where he teaches the capstone course in ethics, leadership, global business planning, and enterprise risk management. Dr. Kraten's research specialty involves the use of communication technologies for communication activities; he is currently conducting outsourcing contract negotiation simulations with a network of academic institutions in the US, Asia, Europe, and Africa.

Dr. Kraten is a Certified Public Accountant who spent eight years in the auditing, accounting, and consulting divisions of Deloitte & Touche and BDO Seidman, the second and fifth largest public accounting firms in the world, respectively. He resigned a consulting partnership at BDO in 1995 to become co-founder and President of Enterprise Management Corporation (EMC), a consulting firm now based in Connecticut with centers of excellence in negotiation, entrepreneurship, and social policy. Dr. Kraten has earned a PhD in behavioral and managerial accounting from the University of Connecticut. He previously earned an MPPM in public and private management from Yale University, and a BBA in public accounting from Baruch College - The City University of New York.

BPLAN	Business Planning: A Managerial Accounting Approach
EPRES	Executive Presence: An Experiential Approach to Networking & Negotiation
NRISK	Negotiating Risks: A Business Planning Approach

LIN KROEGER, CMC, SENIOR FELLOW, BUSINESS LEARNING INSTITUTE, INC.

Lin Kroeger, Senior Fellow, Business Learning Institute, has been a management consultant for 30 years, focusing on strategic communication and its role in leadership, management, and employee capability. Known for being practical and for providing custom consulting, Kroeger designs and delivers programs on leadership, organizational and interpersonal communication, change management, and team dynamics.

Recent projects include assess the effectiveness of performance management within a Fortune 500 financial division; designing an organization re-structuring transition process and communication strategy; designing and facilitating leadership off-site meetings; designing a communication strategy and plan for the launch of a major new management process and its related tools.

Clients have included Fortune 500 and Fortune 10 companies in financial services, pharmaceuticals, and consumer products. She has also worked with not-for-profit/education and government groups and for both regional and national accounting firms.

A speaker and writer, Kroeger holds a B.A. from The College of William and Mary, a Master's Degree from Villanova University, and a Master's Degree from Cornell University.

BPAFW	Best Practices in Accounting and Finance Writing: Being Clear and Accurate (2-hour Webcast)
BPAFPIO	Best Practices in Accounting and Finance Writing: Putting Ideas in Order (2-hour Webcast)
MBW	Best Practices in Writing - for the Financial Services Professional
TCPC	Build a Team by Teambuilding!
BCCC	Building a Culture of Conversation: Communication with a Purpose for Results
LUAC	Challenge Thinking to Succeed
CPS	Creative Problem Solving
DDP	Dealing with Difficult People
DCS	Developing a Communication Strategy
RTMC	Developing and Retaining Talent – an Organization Imperative
EI	Emotional Intelligence and Personal Leadership
LEAF	Getting Things Done - Engaging People to Execute Effectively (Available as a 2-hour Webcast)
C3E	I Said, You Said: 3 Steps to Effective Communication
DPSI	It's All in the Presentation: Designing Presentations to Sell Ideas Effectively
LMF	Leader vs. Manager vs. Facilitator: When, Why, How? (Available as a 2-hour Webcast)
LA-4	Leadership and Authenticity
GCMMG	Leadership and Generations: What Are They Thinking? (Available as a 4-hour Webcast)
GENSHIFT	Leadership and Retaining Talent: How the Generational Shift is Changing Leadership new
LATB	Leadership and the Blogger
LFMO	Leadership in Fast-Moving Organizations
IVAC	Leadership in the Midst of Change: What Do I Do Monday Morning?
LFAA	Leadership: Alignment and Accountability
LCDE	Leadership: Coaching to Develop and Empower - Accountability, Delegation and Dialogue (Available as a 2-hour Webcast)
LCV	Leadership: Communicating the Vision; Aligning the Values
MCWP	Leadership: Execution and Greatness - Great Ideas That Work
LMPN	Leadership: Motivation – The Power of Needs, Styles and Ownership
PSPE	Leadership: Personal Style and Personal Effectiveness
LPAI	Leadership: Power and Influence
MLT	Leading and Managing: More and Less Than You Think
APAI	Leading Change: Action Planning to Actual Implementation
PMIFC	Managing Performance to Implement Strategy
MBC	Message-Based Communication
MBP	Presentation Skills: Message Based Presentations
PFDNFA	Presenting Financial Data to Non- Financial Audiences - Avoiding Over-simplification new
PFICE	Presenting Financial Information Clearly and Effectively new
PMIP	Project Management: Get the Buy-In to Get Results
RM	Sharing Skills Between Generations
SCCPM	Skillful Coaching: Careers and Performance Matter

About Our Instructors

(Lin Kroger courses continued)

SGS	SMART Goal Setting: Setting Goals to Achieve and Contribute
PSIE	Special Delivery: Delivering Presentations to Sell Ideas Effectively
SMLT	Your Strengths, Your Management Talent, Your Leadership: Making a Difference for You and Others

BRIAN KUSH CPA, CISA, CITP

Brian has experience as a financial and IT auditor, a consultant and trainer serving the accounting profession, and as a coach.

He is a Certified Public Accountant, a Certified Information Systems Auditor, and a Chartered Information Technology Professional. He worked at a Big 4 accounting firm for five years and at a leading consulting firm that served the audit industry for eight years. During those experiences, Brian has worked with hundreds of CPA firms, and trained and consulted with thousands of accountants and IT professionals on process reengineering and utilizing technology tools. He has worked intimately with all levels of professionals, from partners and executives to level one employees.

Brian has worked under an executive master certified coach for over four years and has been coaching individuals to success, whether formally or informally, for years.

His unique experience puts him in position to coach and work with your professionals while having lived the lives on both sides, as an accountant and IT professional, and as a coach. It also has provided him a great learning perspective on how the different workforce generations interact, struggle, and flourish.

But those are his technical skills. It's the passion and desire to push others to achieve, and share in the actualization of that achievement, that makes him unique.

NJQUEST	It's not Just the Question: Using Effective Communication Skills and Professional Skepticism while Gathering Information and Evidence

JENNIFER LOUIS, CPA

Jennifer F. Louis, CPA, has more than 18 years of experience in designing and instructing high-quality training programs. In 2003 she formed Emergent Solutions Group, LLC, serving organizations by providing training services on a project-specific or part-time basis.

Most recently, Ms. Louis was executive vice president / director of training services at AuditWatch, Inc., a premier training and consulting firm serving the audit profession. She began her career at AuditWatch as vice president of product development. Before joining AuditWatch, Ms. Louis was the financial / operational audit manager at AARP.

Ms. Louis also was an audit manager for Deloitte & Touche LLP. During her years at Deloitte & Touche's Washington D.C. office, she was a frequent local and national instructor. She also served as an instructor for the firm's national "Train the Trainers" program.

Ms. Louis graduated summa cum laude from Marymount University with a BBA in accounting. She is a member of the American Institute of CPAs and is licensed to practice in the Commonwealth of Virginia.

ABB	Auditing Bits in Bytes™
A133	Audits in Accordance with Yellow Book new
BLM	The Balanced Leader-Manager: Using the Right Leadership Style
NTAA	A Basic Overview for Non-CPAs and Those Charged with Governance of the Most Critical Issues Faced by the Accouting & Auditing Profession Today
AWAC	Best Practices for Audits in Compliance with Government Auditing Standards and OMB Circular A-133 new
CYS	Coaching Staff to Stay on the Right Track (Available as a 2-hour Webcast)
CPM	Critical Performance Measures: Useful Tools for Gauging Success (Available as a 2-hour Webcast)
RAS	Effective and Efficient Risk-Based Financial Statement Audits in Compliance with Yellow Book (Available as a 2-hour Webcast)
EBPA	Employee Benefit Plan Auditing
ESTM	Essential Skills for CPA Firm Managers new
EXESUMAA	Executive Summary Accounting & Auditing for Industry new
INSFSA-W	How Audited Entity Mngmnt. and Governance Can Influence a More Effective & Efficient Financial Statement Audit (Available as a 4-hour Webcast)
IFRSJL	The Impact of IFRS and Other Global Standards on Private Entities (Available as a 2-hour Webcast)
IND	Independence & Objectivity for Attest Service Providers
ICDNP	Internal Controls Design, Evaluation and Communication for Not-for-profits (Available as a 2-hour Webcast)
ICDEC	Internal Controls for Smaller Entities - Practical Case Studies in Design, Evaluation and Communication (Available as a 2-hour Webcast)

(Jennifer Louis courses continued)

IFRS3	International Financial Reporting Standards: An Overview of the Looming Change to Global Standards new
IACM	Interviewing to Avoid Costly Mistakes in Hiring (Available as a 2-hour Webcast) new
MIH	Make it Happen! The Art of Discipline and Getting Things Done new
MIH-W	Make it Happen! The Art of Discipline and Getting Things Done (2-hour Webcast)
MRS	Making Rain: Strategies for Client Service, Selling and Negotiating (Available as a 2-hour Webcast)
RSRCHCOD	Performing Research Using the Codification new
PSWY	Personality Styles: What You Absolutely Should Know About Yourself & Others
PAANFP	Practical Accounting and Auditing Issues Facing Nonprofit Entities new
PAAUGNE	Practical Accounting and Auditing Update for Governmental and Nonprofit Entities new
PEXAAI	Practical Explanations of Accounting & Auditing Updates for Industry new
SOXW	Sarbanes-Oxley Section 404: What Everyone Needs to Know About Internal Controls
INQ	Strengthen the Inquiry Skills You Need to Gather Audit Evidence (Available as a 2-hour Webcast)
TOP5-W	Top 5 Ways to Get the Most Value for Your Audit Fees (2-hour Webcast) new
MLC8	Value-Added Internal Control Communications that Comply with the Standards - Detailed Analysis and Case Studies

PETER MARGARITIS, CPA, MACC

Peter Margaritis is the CEO of IFRS Education and Training, LLC. IFRS Education and Training, LLC delivers high quality IFRS programs to CPA's, accountants, and business leaders.

Peter's background includes a bachelor's degree in Business Administration from the University of Kentucky, and a master's degree in Accountancy from Case Western Reserve University. He is a licensed CPA who has a certificate in IFRS from the Institute of Chartered Accountants in England and Wales. He has also developed a four credit hour college course on IFRS, and is a member of the AICPA team that is writing IFRS questions for the CPA exam.

In addition to running his own business, Peter is on faculty at Ohio Dominican University and the University of Maryland at University College. He has worked for companies such as Price Waterhouse, Victoria's Secret Catalogue, Gap Inc. Direct, Barnett Bank, C & S National Bank, and Franklin University.

Peter is a member of the American Institute of CPAs and the Ohio Society of CPAs. He is currently the past chair of the Ohio Society of CPAs' executive board of directors and is a member of the AICPA governing council.

BDS	Business Development Skills for Accountants
CAREER	Career Management: What"s Next for You?
IFRSUPDT	IFRS Update new
IFRSGAAP	IFRS vs. GAAP: The Differences That You Need to Know
IFRS5000	International Financial Reporting Standards (IFRS) From 5,000 Feet
LEADDIFF	Leadership from a Slightly Different Perspective new
IFRSASET	Measurement of Major Assets and Impairment new
NETMING	Networking: Even Accountants Can Mingle
SPEAK	Public Speaking and Presentational Skills for Accountants
NEEDIFRS	Things That Every CPA Need to Know About IFRS new

About Our Instructors

DONALD PARIS, CPA, MST

Don Paris, CPA has helped business owners, companies and private individuals achieve their financial goals for almost 30 years. Instead of providing too little service to too many clients, Don provides personal attention to his select group of clients. This individual attention enables him to understand and further his clients' personal and business goals.

He is past chair of the Ethics Committee for the Greater Washington Society of Certified Public Accountants, and teaches ethics to CPA's from Maryland, Virginia, Washington D.C., Delaware, North Carolina and Pennsylvania. He is one of approximately 25 qualified Peer Reviewers in the State of Maryland. Washington SmartCEO magazine named him one of the top 50 CPA's in the Washington, DC metropolitan area in 2005, 2006 and 2008. He has been quoted in Forbes, MSN, AMA News, and other publications. He is a prior contributing author in Smart CEO magazine, which is published monthly.

His dedication to his profession is further demonstrated by the formal, ongoing education he undertakes to practice accounting to the highest standards. He holds a master's degree in taxation, a post-master's certificate in electronic commerce and is Certified as a Divorce Financial Analyst bringing a wealth of knowledge to the needs of the client.

MCE	Maryland CPA Ethics Training
VCET	Virginia CPA Ethics Training
MCEVCET	Virginia, DC and Maryland CPA Ethics Training

ALAN PATTERSON

Dr. Alan Patterson has guided more than a dozen Fortune 500 companies in re-thinking how best to elevate their talent and driving effective organizational change. He has 27 years of international consulting experience in change management, leadership development, and executive coaching. In 2006 he formed Mentoré, a consulting organization that focuses on aligning leadership, strategy, roles, and skill sets to major shifts in the business. Prior to Mentoré Alan worked as a Partner for 20 years at Bryan Associates, Inc., a consulting group specializing in competency-based talent development initiatives.

Alan's expertise has been tapped by many global and national organizations, including Anheuser-Busch, CVS, Entergy, Federal Reserve Bank, Johnson & Johnson, Hewlett-Packard, Major League Baseball, Merck, Sea World, United States Navy, and Williams Sonoma.

A published author, Alan has been a featured speaker and workshop leader for several national associations, including serving as a national expert resource for the American Institute for CPAs (AICPA) and many state CPA associations. He holds a BA from the University of Wisconsin-Madison, an MA from University of North Carolina-Chapel Hill , and an Ed.D. from Boston University.

BAO	Building an Adaptive Organization
BSD	Business Strategy Development: More Than Operational Planning new
CCFO	The Customer Map: A Critical Tool for Developing Business Acumen
ETP	Elevating Team Performance
EMERGE	Emerging CFOs and Financial Executives: One on One Assessment and Coaching
DICM	The Finance & Accounting Org as Strategist and Partner to the Business Transformation- Business. Acumen & Relationship Management (Also as a 2-hour Webcast)
FCCFO	From Controller to CFO: How to Acquire the Skills Needed to Make the Leap
FCCFO-W	From Technical Expert to Financial Leader: How to Make a Critical Leap in Your Career Development
HPO	How the Best Financial Executives Create High Performance Organizations (Available as a 2-hour Webcast)
CNCC	How to Build a Culture that Maximizes Trust, Accountability, and Performance
HIRE	How to Hire the Right Candidate: A Selection and Interview Process That Gets You What You Need
IDHT	Identifying, Developing, and Hanging on to Talent (Available as a 2-hour Webcast)
IOBV	Integrating Organizations, Blending Values
COACH	Leaders as Coaches: Techniques for Maximizing the Development and Retention of Talent
MSBP	Managing Strategic Business Partners (2-hour webcast)
NLD	New Leader Development
DTLT	Succession Planning: Developing Tomorrow's Leaders Today (2-hour Webcast)

RAY PERRY

For more than two decades, Ray Perry has established a national reputation with private- and public-sector organizations alike for his results-focused approach to strengthening workplace performance. The founder and president of Skill Track Inc., Ray works closely with clients to guide them in optimizing productivity and effectiveness through targeted professional and organizational development.

Featured in the new book, Leadership: Helping Others to Succeed, Ray helps clients tackle key performance issues such as: strategy and execution, customer relationship management (CRM), performance management, leadership development, time management, team building, productivity, project management, and communication.

Ray consistently brings the same commitment to each client engagement – a genuine interest in helping clients to reach new performance levels, which in turn strengthen the organization's ability to achieve the kind of bottom-line results that stakeholders expect in today's efficiency-minded business culture.

A native of Rhode Island, Ray earned a BA in psychology and business administration from Roger Williams University. He is a member of the American Society for Training and Development (ASTD), the National Speakers Association (NSA), the International Speakers Network (ISN) and the International Federation For Professional Speakers (IFFPS).

BSC	Balanced Scorecard
CCU	Coaching and Counseling - Dealing Effectively with Underperformance
CC	The Communication Challenge: Disarming Difficult People
SCM	Conflict Resolution - Diffusing Conflict without Diminishing Relationships
CRM	The CRM Advantage – From Vendor to Adviser in 90 Days
EMP	Effective Meetings and Presentations - How to Make an Impression that Makes a Difference
ES	Excellence in Management - Driving Results Without Driving Your Team Crazy
DGCS	Exceptional Customer Service - When 'Wow' Becomes the Rule
GSO	Organizational Productivity - Practical Strategies for Getting and Staying Organized
PSPA	Overcoming Procrastination - Bridging the Gap Between Your Goals and Reality
OTPM	Project Management - Delivering Results On Time and Within Budget
RD	Respecting Diversity
LSFM	Results-Driven Leadership – Bridging the Gap Between Strategy and Execution
BGC	Situational Communication: How to Connect with More People More Often
DFR	Situational Delegation - Inspiring Accountability in Your Employees
SC	Strategic Coaching - Growing Top-Notch Performers
TBEL	Team Development - Secrets Behind Building an Award-Winning Team
TSP	Team Strategic Planning
TMIP	Time Management for Improved Performance - The Discipline of Getting Things Done
TT	Train the Trainer - How to Make Learning More Meaningful

GRETCHEN PISANO

Gretchen Pisano, owner, Sounding Board Ink LLC, a network of talented professionals practiced in the art and science of guiding groups from insights to actions. Gretchen is a skilled organizational architect and graphic facilitator in the organization development arena. Her methodologies are inspired by creative process design and graphic facilitation designed to make our thinking visible to ourselves and to others. Gretchen is a strategist for the Business Learning Institute and facilitates strategic planning and training for firms, companies and organizations.

Ms. Pisano's corporate skill-set is further enriched by a background in personal coaching, marketing, and the café conversation process. Her work has taken her around the globe and across industries, practicing in a variety of settings and across government, non-government, and corporate sectors, including: global councils, worldwide annual meetings, national conferences, think tanks, large scale corporate change initiatives, consortiums, taskforces, and local community development initiatives.

Ms. Pisano holds a Master of Applied Positive Psychology from the University of Pennsylvania and a BS with a double emphasis in Business Administration and Marketing from the University of Southern California. She is a Master Certified Coach, Martha Veck, Inc., and has sixteen years of practical experience.

CALM	Calm in the Midst of Chaos: Techniques & Tips for Managing Stress Levels During Busy Times new
CES	Change Efforts that Stick
EYIS	Embrace Your Inner Superhero
LNN	Leadership in the New Normal new
GRASP	Learn to Communicate in Way that Others Can Easily Grasp new
M2M	Personal Leadership in the New Normal new
MLW	The Well Compensated Mother: Strength-based Leadership Strategies for the Working Mother

About Our Instructors

ANDREW ROSE

Andrew Rose is the Director of Marketing and Business Development with Naden/Lean, LLC. Andrew oversees the marketing, business development, strategic alliances/alternate channel distribution, and direct sales. An innovative marketing authority, Andrew is frequently asked to speak to groups about Cold-Calling Techniques, Vertical Marketing Strategies, Marketing without a Budget, Tactical Joint Marketing, Business Development, Search Engine Optimization (SEO), Search Engine Marketing (SEM) and Networking.

Andrew is also deeply involved in the non-profit community, sitting on or advising several non-profit boards. Andrew has had excellent results in founding and chairing various peer support and networking/referral based groups. He founded the Marketing Director's Support Group in 2003, a well-respected, educational forum for marketing directors of professional firms in the Baltimore region.

Andrew is a dedicated outdoor enthusiast who currently relishes in summiting 14ers in Colorado.

NETBD	Practical Networking and Business Development for CPAs
SOMELEAD	Using Social Media for Lead Generation

FRANK RYAN, CPA, MBA

Frank is president of a management consulting firm specializing in turnarounds, workouts, crisis management, strategic planning and working capital management. He has extensive experience working with banks in negotiating forbearance agreements, loan workouts, capital restructuring, vendor negotiations and bank lending requirements. Frank
Is a leading expert in Lean Operations and Management and has implemented numerous lean applications for organizations.

Prior to his consulting business, Mr. Ryan was the chief operating officer of a mid-sized manufacturing company. Additionally, he has served as the chairman of the Audit Committees of two publicly traded companies and has extensive board level experience in for profit and non-profit arenas.

He is a retired Colonel in the United States Marine Corps and has served in numerous contingency operations to include Haiti, Afghanistan and Iraq. He received the "Outstanding AICPA Instructor" award in 1994-95, & again since 2005 when the award was reactivated.

Frank is a recipient of the AICPA Outstanding Discussion Leader Award for 2010.

ABCFR	Activity Based Costing for Accounting and Finance Professionals: A case study approach
ABSR	Avoiding Bankruptcy - Surviving the Recession (A Case Study Approach)
CHALCFO	Challenges for Financial Professionals new
CPMUT	Critical Performance Measures - Useful Tools for Gauging Success (Frank Ryan)
CEICFO	Current Economic Issues and Their Impact on the Financial Professional new
EVAMS	Economic Value Added - Maximizing Shareholder Value (Frank Ryan)
ECFR	Effective Communications
EPA	Ethics Principles and Applications (Available as a 4-hour Webcast)
EAA1	Ethics, Leadership and the Role of the CPA (Available as a 4-hour Webcast)
EAA2	Ethics, Leadership and the Role of the Financial Professional
STR	Financial and Accounting Decision Making in a Slowly Recovering Economy (Available as a 2-hour Webcast)
FINWAR	Financial Warfare new
COSTWHAT	It Cost What! A practical approach to Implementing Activity-Based Costing new
KEYFINAN	Key Financial and Economic Issues Facing the Financial Executive new
LMTB-4	Leading, Mentoring and Team Building
LMLE	Lean Management in a Lean Economy
SOPF	Strategic and Operational Planning and Forecasting

DAVID SCHMIDTKNECHT, CPA

David Schmidtknecht, CPA, PMP has more than 20 years experience in corporate management, operations and finance. He has spent most of his career with companies that provide technology solutions - including ERP, information management systems and systems integration - to private and public sector clients. His blend of financial management experience and technology expertise has given David a deep understanding of the enterprises (Agency), and how, with the right solutions and expert implementation, they can more easily solve technology-based problems

Previously David was the VP of Civilian Government and Delivery at a boutique business Intelligence Firm specializing in the US Federal Government. He has held roles of CFO, World Wide Controller, and Financial Controller for several consulting firms. He has led companies through annual audits, DCAA audits, annual financial and strategic planning and several business acquisitions. David recently led a firm through CMMI Level II Certification.

David earned a bachelor's and master's degree in accounting from Strayer University. He is a certified public accountant in the Commonwealth of Virginia and a PMI certified PMP.

CRYSTAL	Crystal Reports XI - Fundamentals of Report Design I (Introduction)
CRYSTALI	Crystal Reports XI - Fundamentals of Report Design II (Intermediate)
CRYSTALA	Crystal Reports XI - Fundamentals of Report Design III (Advanced)

THOMAS SELLING, PH.D., CPA

Tom Selling is the author of the Accounting Onion (www.accountingonion.com), one of the most popular weblogs providing investor-oriented commentary on current financial reporting issues that affect public companies. He has produced and led over 150 executive and professional courses on finance, U.S. accounting standards, international accounting standards and the SEC in sixteen countries; and he frequently serves as an expert witness and consultant on accounting matters.

Prior to joining the Thunderbird School of Global Management in 1992, where Tom is now an emeritus professor, he served a one-year term as the Academic Fellow in the Office of the Chief Accountant of the U.S. Securities & Exchange Commission (SEC). He also served on the faculties of the Tuck School at Dartmouth College, Sloan School at MIT, and the Babcock School at Wake Forest University. He has a Ph.D. in Accounting from the Ohio State University, and a B.S. and MBA from Cornell University.

In the area of financial reporting, Tom has published numerous articles in academic and professional journals including The Accounting Review, Accounting Horizons and Financial Analysts' Journal. He is a co-author of the textbook, International Financial Reporting and Analysis (McGraw-Hill Publishing Company), and for the past year has been a co-author of SEC Compliance: Financial Reporting and Forms, a monthly loose leaf and online service published by Thomson Reuters.

Tom is also President (and a co-founder) of Grove Technologies LLC, producer of hosted web-based collaboration software marketed as GroveSite (www.grovesite.com). GroveSite's enrolled users number approximately 20,000 worldwide.

ACM	Accounting Considerations for Mergers and Acquisitions, Including Business Combinations
AIOPS	Accounting for International Operations
HEDGE	Derivatives and Hedge Accounting: The Essentials
ESEC	The Essentials of SEC Financial Reporting
UIFRSGAA	Understanding International Financial Reporting Standards (IFRS) from a U.S. GAAP Perspective

About Our Instructors

RONALD SHAPIRO

Expert Negotiator, Sports Agent, Corporate Attorney, Educator, Author, Civic Leader, and Founder of Shapiro Negotiations Institute (SNI) Ron Shapiro has developed his Negotiations philosophy on four decades of deal-making experience. He is best known as having represented more Major League Baseball Hall of Famers than any other agent, including Cal Ripken, Jr., Kirby Puckett, Eddie Murray, Jim Palmer, and Brooks Robinson. USA Today called Ron "one of baseball's most respected agent-attorneys" as well as "an effective behind-the-scenes negotiator." He was also named one of the "100 Most Powerful People in Sports" by The Sporting News.

Ron's Negotiation and Influencing techniques have resolved a national symphony orchestra strike, facilitated solutions to human relations problems, and reconciled disputes in government, corporate, and major biotechnology challenges. As Chairman of SNI, he has negotiated on behalf of Fortune 500 companies, government agencies, as well as entertainment and news personalities. Ron is also currently the Special Advisor to the Owner of the NFL's Baltimore Ravens and to the General Manager of the NBA's San Antonio Spurs.

A charismatic and dynamic individual, Ron has appeared as an Negotiation expert on ABC's "Good Morning America," CNBC's "Power Lunch," NPR's "Morning Edition," "The Larry King Show," ABC's "Nightline," and ESPN's "Mike and Mike in the Morning" and "Up Close."

Committed to public and civic matters, Ron has chaired over 25 boards of charitable and civic organizations, as well as serving on numerous others. He has received numerous special honors and recognitions for both his business and community contributions, including the American Sportscasters Association Hall of Fame Mel Allen Service Award for distinguished public service and Maryland Marketing Statesman of the Year.

DTP	Dare to Prepare: How to Win Before You Begin

BILL SHERIDAN, CAE

Bill is the Maryland Association of CPAs' e-communications manager and editor and one of the CPA profession's most enthusiastic social media cheerleaders.

A member of the MACPA team since 2000, he is creator and co-writer of CPA Success (www.CPASuccess.com), the MACPA's daily blog and one of the profession's leading voices in the blogosphere. He also is creator, writer and producer of CPA Spotlight, a weekly podcast that examines issues of importance to CPAs; and creator of a series of electronic newsletters that provide MACPA members with headlines and resources in four subject areas (taxation, technology, resources for CPA firms, and resources for CPAs in business and industry).

As editor, Bill oversees content for both the MACPA's Web site and its quarterly member magazine, the Statement. His articles about the MACPA and the CPA profession have appeared in Association Management and SmartCEO magazines and have been distributed nationally by the American Institute of CPAs.

Before joining the MACPA, Bill spent more than a decade as both a print and online journalist. He also is a freelance writer and holds a bachelor's degree in communication from the State University of New York at Buffalo.

Follow him on: Twitter: Twitter.com/BillSheridan; Facebook: Facebook.com/BillSheridan; LinkedIn: LinkedIn.com/in/BillDSheridan; FriendFeed: FriendFeed.com/BillSheridan

SOCMED	Social Media Strategy & Quick Start: Developing and Implementing a Social Media Strategy for CPA Firms & Organizations
WEB20	Web 2.0: Less Hype, More Help

MARK SLATIN

Mark has a passion for helping clients who love what they do but are struggling to grow their revenues. He believes that his client's success directly depends on the confidence their clients have in them. At EntreQuest, Mark brings a unique perspective of trust to his clients from his background speaking, training, consulting and coaching on the topic.

Prior to joining EntreQuest, Mark founded True Colors Consulting in 2007 and served as President until it was acquired by EntreQuest in March, 2010. His clients come from a variety of industries including computer hardware, accounting and financial services, legal, office products and furniture, marketing and other professional services. He was a Trusted Advisor Associate, part of a select group of consultants licensed to deliver programs based on best-selling author Charles H. Green's books, "The Trusted Advisor" and "Trust-Based Selling."

In his role as a Contributing Editor for OnPoint Magazine (a trade publication for the office products industry) and for The Independent Dealer Magazine (in the same industry), he writes about topics that provide readers with valuable selling insights en route to higher profits.

He serves as an Adjunct Professor at Loyola University in Maryland teaching Sales Management and Strategies to MBA students.

LBT	Listening to Build Trust
TCS	Trust Centered Selling: How to Attract and Retain Loyal Clients through Trusting Relationships (Also available in a series of five 1-hour Webcasts)

JERRY SOLOMON

Currently Mr. Solomon is the VP of Operations - Hunt Valley, for MarquipWardUnited, the largest division of the Barry-Wehmiller Companies Inc., the Western Hemisphere's leading packaging automation and converting group. Mr. Solomon is leading the Lean transformation efforts in both the manufacturing and financial areas.

As a practitioner, Jerry Solomon has had a unique opportunity to implement Lean enterprise techniques as he's held the positions of Chief Financial Officer and Vice President of Manufacturing simultaneously at three middle market manufacturing companies. In his dual role he was able to cast aside traditional departmental barriers and galvanize the accounting and manufacturing areas during the Lean journey.

Mr. Solomon is the author of the Shingo Award winning book, "Who's Counting?", a highly acclaimed business novel focusing on the interaction of manufacturing and accounting during a Lean transformation, and "Leading Lean," a novel about a three day Lean event. Mr. Solomon brings a unique perspective to the requirements of manufacturers in their quest to achieve World Class performance.

Mr. Solomon has a B. S. degree from Clarkson University, an M. S. degree from Michigan Technological University and an M. B. A. degree from the University of Chicago. He's served on the Board of Directors of Vermont Castings Inc. as well as the Green Mountain Economic Development Corporation. He's been an instructor in Lean Accounting, is on the Board of Directors of the Maryland World Class Manufacturing Consortium as well as serves as the Chairman of the Vendor Certification Committee.

LEAN Lean Accounting for the Lean Enterprise

About Our Instructors

ROBERT TAROLA, CPA

Robert M. Tarola, CPA, president of Right Advisory LLC, offers a unique perspective to address business and professional challenges of accountants, auditors, attorneys, governance bodies and finance professionals.

He has extensive experience as a public company director, public company CFO and public company auditor. He is a former Chief Financial Officer of W. R. Grace & Co. (NYSE: GRA) and MedStar Health, Inc. both of which are multi-billion dollar businesses with complex multinational operations. In these positions he had responsibility for worldwide financial services, which included financial accounting and reporting, treasury and taxation, financial planning, investor relations, internal auditing, and investment management.

Prior to serving 12 years as a CFO, Mr. Tarola was a partner with Price Waterhouse LLP.

Mr. Tarola is a director of public mutual funds sponsored by Legg Mason, Inc.; a director of publicly traded TeleTech Holdings Inc. (NASDAQ: TTEC), a director of the American Kidney Fund, and has served on the boards of directors of several health and community organizations. Mr. Tarola holds a Bachelor of Business Administration degree from Temple University and has chaired the Advisory Board to the President of the University.

ARBBS	Audit Risk - Beyond the Balance Sheet
ERMAF	Enterprise Risk Management - Accountability Framework
EIA	Ethics in Accounting
IFCS	Insights From The C-Suite

RAY THOMPSON, CMA, CFM, CBA

Dr. Ray Thompson is Emeritus Associate Professor of Accounting & Finance at the University of Pittsburgh. He has taught in graduate and undergraduate business programs in Europe, Africa and the US. He received his B.S. and M.S. degrees in Economics and Systems Dynamics from the University of Bradford in the United Kingdom, his M.B.A. in Accounting from Xavier University of Ohio, and his Doctor of Business Administration from Nova University. Ray is also certified in Financial Management and is a Certified Management Accountant and Certified Business Appraiser. He recently became certified in International Financial Reporting Standards though the Institute of Chartered Accountants in England and Wales.

Ray is a professional educator and writer. He also provides business valuation services and consults with accounting firms and sole practitioners on a range of accounting issues in the area of valuation. Ray was part of the George & Ray team which offered Accounting & Auditing courses for over 20 years. He authors and conducts professional development seminars for CPAs throughout the US. Ray is a member of the Institute of Management Accountants and the Institute of Business Appraisers. He is also a faculty associate member of AICPA and PICPA, and is a member of the Financial Reporting Faculty of ICAEW. He lives in Bedford County, PA, and can be reached at (814) 839-0143 by phone or at drrayt@getwireless.net.

FRI	Accounting Standards Review for Controllers and Finance Professionals
EUBI	BLI's Ethics Update for CPAs in Business & Industry new
PEU	Ethics and the Attest Function: A Practical Update for CPAs in Public Practice new
FSU	FASB / SAS Update (Latest Edition)
CRO	Guide to Compilation, Review and the Cash and Tax Basis of Accounting (Latest Edition)
WAVE	Preparing for the Coming Wave of Accounting Standards new
WAVEFVM	Preparing for the Coming Wave of Accounting Standards: Fair Value Measurement new
WAVEFINS	Preparing for the Coming Wave of Accounting Standards: Financial Instruments, Debt & Equity Accounting and Comprehensive Income new
WAVEIFRS	Preparing for the Coming Wave of Accounting Standards: IFRS GAAP Convergence new
WAVELEAS	Preparing for the Coming Wave of Accounting Standards: Lease Accounting new
REVREG	Preparing for the Coming Wave of Accounting Standards: Revenue Recognition
UIFRS	Understanding IFRS: A Hands-On, How to Approach

KELLY WATKINS

Kelly J. Watkins, MBA, is an international speaker with 20 years of speaking experience. She is the author of five books and 135+ articles. Kelly is president of Expressive Concepts, a company which specializes in Motivational Keynotes and customized Communication Training. Kelly has an MBA in Marketing and International Business and a B.S. with Distinction in Marketing.

Kelly is an adjunct college instructor. She is a regular columnist for two magazines on communication-related topics. She has been quoted by Gannett News Service (100+ newspapers) as an email expert. One of Kelly's books is Email Etiquette Made Easy.

Kelly has been a course facilitator for the AICPA since 2001, has written two full-day courses for the AICPA and has created 14 on-line courses for the AICPA. She has written a feature article for the Journal of Accountancy and has served as Consultant to the state societies of the AICPA for 18 months. She has facilitated 17 Forums for State CPA Societies.

Kelly is Chair-elect, International Forum, National Association of Women Business Owners, Past President of the National Speakers Association/KY(Board of Directors for 10 years), a member of the American Society for Training and Development and a member of Business and Professional Women. She has fulfilled a life-long dream by traveling to all 50 US states and all seven continents. Kelly was selected as one of only 100 US delegates to attend the Canada/US Trade Summit.

Kelly Watkins has witnessed communication and leadership from awesome to awful - all over the planet (on all seven continents). For more information, please visit www.KeepCustomers.com.

ABCSI	ABC's: Above and Beyond Customer Service - Improving Service Improves Your Bottom Line
ETALK	E-Talk: Tips for Using Email Efficiently & Effectively
CLL	How to Communicate Like a Leader
POSCOM	How to Survive Negative Times by Using Positive Communication - Your key to Increased Productivity and Profitability
PACM	Improve Productivity by Avoiding Conflict & Miscommunication
ITSNOT	It's Not What You Say, It's How You Say It
MME	Meetings Made Easy (and Effective)
TRAIN	Training: How to Effectively (and Painlessly) Teach Your Staff
PIZZAZ	Will the Audience Throw Eggs? - How to Present with Professionalism & Pizzazz

MATTHEW WILSON, CPA

Matt has been implementing Microsoft Dynamics GP since 1997 and before that he worked in several corporate accounting positions. He has implemented Dynamics GP for companies that are publicly traded and assisted with designing solutions to maintain compliance with Sarbanes-Oxley regulations. He has also implemented Dynamics GP for companies that perform contract work for the Federal government and must follow Defense Contract Audit Agency (DCAA) requirements.

In addition to his implementation experience, Matt was also a Great Plains Certified Instructor for two years. He taught the Great Plains University classes in financials, distribution, FRx and report writer.

Matt graduated from University of Maryland Baltimore County with a bachelor's degree in Economics and a Certificate in Accounting. His certifications include: ° Microsoft Great Plains Certified Master ° Dynamics GP - Financials, Report Writer, Distribution Series, FRx, Project Series ° GP Certified Instructor ° Microsoft Certified Professional

FRX1	FRx Report Design Essentials I

CURTIS ZIMMERMAN

Both as a speaker and as an author, Curtis Zimmerman has impacted over one million people throughout the nation with his life-changing messages and award winning programs. Audiences connect with Curtis through his interactive style and approachable manner. He incorporates the skills he gained from over twenty-five years in the entertainment industry into his powerful programs, cleverly balancing the connection between education and entertainment. Curtis is an expert at transforming organizations by inspiring individuals to live their life at a higher level of performance.

His deeply profound insight and perspective coupled with his high energy presentations have made him a highly sought after speaker among such notable companies as Walt Disney Entertainment, Swiss Army Brands, Luxottica Retail and Procter and Gamble.

Curtis is the author of I Believe...What do you Believe?, Keys to Success in College and Life, and a contributing author to Pillars of Success and Lessons from the Road. He was honored to share his message with more than 14,000 Airmen for the United States Air Force and received the prestigious National Leadership Award for outstanding service from United States Congressman Tom Reynolds and is a member of the National Speakers Association.

LIVELIFE	Living Life at Performance Level (keynote)

Webcast and Video On-Demand Self-Study

Earn CPE credit at your desktop with webcasts and video On-Demand self-study

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Selected titles include:

Auditing Bits In Bytes
Best Practices in Accounting and Finance Writing
Business Development: Distinctions Between Marketing and Sales
From Technical Expert to Financial Leader: How to Make a Critical Leap to Your Career Development
Getting Things Done – Engaging People to Execute Effectively
Top 5 Ways to Get the Most Value for Your Audit Fees

WEBCASTS

Registering is easy, travel not required,
and dress as casually as you wish.

Webcasts save you travel time and expense by allowing you to see and hear presentations (including slides and handouts) from your home or office .

MACPA and its affiliate, the Business Learning Institute (BLI), brings you essential, world-class CPE via Webcasts.

Our webcasts are offered via the internet as live video webcasts for the benefit of individual members as well as firm or corporate groups.

Check out our webcasts at
www.macpa.org/webcast

VIDEO ON-DEMAND SELF-STUDY

Video On-Demand offers online access to a library of archived webcasts - allowing you to get your CPE when and where you like.

Choose your On-Demand course, watch the video, take the exam and receive your instant CPE certificate.

Important notice: Maryland's State Board of Public Accountancy has enacted final regulations for CPE:

CPE = CPE: this provisions removes the distinction and limitations formerly imposed on self-study programs, making them equal to group study (classroom). This has the effect of counting them as equal and subject to the 76-hour carryover.

Check out our Video On-Demand at
www.macpa.org/selfstudy

Business Learning Institute
Knowledge. Innovation. Leadership. An affiliate of MACPA

Course Listing

A Matter of Integrity

Utilizing a combination of hypotheticals, informative exercises and examples, you will have the opportunity to review the elements and implications of recent changes to CPA ethical standards, and join others in enhancing the vital leadership role CPAs play in the business community today. The CPE credits satisfied by this seminar are required by the Maryland Board of Accountancy every two years. CPAs residing and working in the state of Maryland also licensed in Virginia please note: *It is a policy of the Virginia Board of Accountancy to accept the CPE requirements met by a CPA in their home state (where they live and work) as long as it is comparable to the requirement for 120 hours over 3 years.*

Objectives: To familiarize CPAs with the essential elements of evolving CPA ethics standards and the heightened expectations of our clients, the public and our fellow CPAs

Highlights: Part 1. Ethics. • What is it • "A Day in the Life of Jane Ledger" - A hypothetical outlining many of the critical ethical issues facing CPAs today • Includes an update on current ethics developments and opinions• Part 2. Trust. • What is trust • How do CPAs enhance it • How can it be repaired when lost • How can CPAs build trust in our work and in our profession• Part 3. Leadership. • The nexus between high ethical standards and perceptions by clients and the public • How ethics and genuine leadership go hand-in-hand • What should firms and businesses do differently in this new age of accountability• Part 4. Integrity. • The new AICPA disciplinary process and standards • Recent disciplinary cases • A Matter of Integrity: Where do you go from here

Designed for: All licensed CPAs in practice, industry, education and government

Recommended CPE: 4
Prerequisites: None
Event ID: CELT
Course Level: Overview
Format/s: Group Live
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Michael Daigneault, Esq.

ABC's: Above and Beyond Customer Service - Improving Service Improves Your Bottom Line

Don't work harder than you need to! It costs six to ten times more - in time, money and effort - to obtain a new customer than it does to keep the one you already have. When your current customers/clients are happy, they'll come back - and they'll tell others. This highly interactive program teaches relevant techniques to establish the customer service mindset at the highest level of your firm or company. It includes role play exercises, examples and discussion.

Objectives: Recognize the importance of customer service • Learn practical techniques to improve customer service throughout your organization • Know how to improve your bottom line by satisfying current customers • *Discover the number one key to distinguishing your company or firm from the competition • Develop a customer-focused environment within your firm, company, or department

Highlights: How to exceed expectations and create memorable experiences • Three techniques for training staff to provide exceptional service • Seven practical methods to deal with dissatisfied customers • Determining what your customers really want • Four ways to generate enthusiasm and a positive, can-do, customer-focused attitude • How to maintain enthusiasm • Avoiding costly misunderstandings with customers • The customer isn't always right and what you can do about it

Designed for: People who are responsible for leading the company or firm, or people who manage staff

Recommended CPE: 8
Prerequisites: Management experience
Event ID: ABCSI
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

Accounting Considerations for Mergers and Acquisitions, Including Business Combinations

This course covers accounting considerations throughout the life cycle of merger and acquisition activity. The official guidance is primarily located in Topics 350 (Goodwill) 805 (Business Combinations) and 810 (Consolidation), virtually all aspects of which have been recently modified with the issuance of FAS 141(R), and revisions to FIN 46(R). Numerical examples and cases will be provided throughout the course, and we will also be describing the significant differences between U.S. GAAP and International Financial Reporting Standards (IFRS).

Objectives: Understand the key financial reporting issues of mergers and acquisitions

Highlights: Determining the accounting guidance applicable to an acquisition (variable interest entities, business acquisitions versus asset acquisitions) • Applying the appropriate guidance for initial recognition and measurement, including the "acquisition method" and accounting for the parent's investment in subsidiaries using the equity method • Determining initial and subsequent measurements of non-controlling interests • Accounting for goodwill and other intangible assets

Designed for: Finance and accounting professionals who seek to learn more about mergers and acquisitions

Recommended CPE: 4
Prerequisites: Experience in mergers and acquisitions
Event ID: ACM
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Thomas Selling, Ph.D., CPA

Accounting for International Operations

This course provides an accounting and managerial perspective on the financial reporting issues which can arise when conducting foreign operations or engaging in foreign currency transactions. It offers an in-depth treatment, through discussion of principles and numerous illustrative case studies, of virtually all aspects of controlling and reporting the results of international operations (4 - 12 hour format).

Objectives: Gain an understanding of the drivers of economic exposure to foreign exchange fluctuations (at both the subsidiary and financial instruments level), and how the determination of a subsidiary's functional currency affects the financial reporting

Highlights: Key differences between economic exposure to foreign exchange and accounting exposure • How the choice of functional currency affects accounting systems design and reported financial results • Accounting for foreign currency derivatives and hedges • Comprehensive case studies and examples and examples that can be adapted to a company's own operations • Differences between U.S. GAAP and International Financial Reporting Standards.

Designed for: Accountants and finance professionals that expect to be dealing with foreign operations

Recommended CPE: 4
Prerequisites: None
Event ID: AIOPS
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Thomas Selling, Ph.D., CPA

Accounting Standards Review for Controllers and Finance Professionals

Find out how newly-issued FASB standards for fair value accounting, multiple deliverables & subsequent events will affect your company. Understand how FASB & IASB's convergence agenda is reshaping revenue recognition, lease accounting, financial statement presentation and financial instrument reporting. Participants will receive an update on recent trends in fraud reporting. Obtain a broad-based understanding of a wide range of accounting issues that affect practitioners in industry, both today and in the coming 12 months. Understand how SEC, AcSEC, EITF, ASB and IASB are adapting to demands for different, more timely and accurate financial information. Topics can be customized based on the client's needs and interests.

Objectives: To provide a comprehensive review of current accounting standards which impact practitioners in industry. Recent auditing pronouncements and related developments which affect CPAs in industry will be addressed.

Highlights: Revenue recognition: The new approach • Lease accounting • Consolidations • Financial instrument accounting • Fair value accounting: SFAS 157 and its evolution • A practical guide to impairment • Contingencies and subsequent events • International harmonization of accounting standards • Principles-based accounting • Financial statement presentation • Internal control reporting in public and non-public entities

Designed for: CPAs in industry who prepare and analyze financial reports and those in practice with industry clients who need an overview of current accounting standards

Recommended CPE: 8
Prerequisites: None
Event ID: FRI
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Activity Based Costing for Accounting and Finance Professionals: A case study approach

Coming to grips with the challenges of the market have never been greater. Traditional costing systems provide only minimal guidance to the financial and accounting professionals to assist in improving profitability. This course provides a step by step approach of how to effectively implement Activity Based Costing to improve profitability. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Obtain the tools necessary to implement Activity Based Costing in both for profit and not-for-profit organizations

Highlights: Detailed examination of activity based costing • Going lean in operations • Determining an effective cost of capital • Strategies to improve operations • Case study approach

Designed for: CEOs, CFOs and Controllers

Recommended CPE: 8
Prerequisites: Management experience
Event ID: ABCFR
Course Level: Intermediate
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Frank Ryan, CPA, MBA

Course Listing

Adobe Acrobat Best Features, Forms and Tips for Accountants

The course will present productivity features for using the Adobe Acrobat 9 program for creating, managing and securing PDF files. An overview of Adobe Acrobat X will be presented also. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Become more proficient with the Adobe Acrobat program features to work with PDF files, PDF forms, security settings, bookmarks, stamps, scanning, and searching.

Highlights: Convert a File to PDF • Make image only PDF searchable with OCR • Merge files into a single PDF • Combine PDF Documents • Add Highlights and Bookmarks • Mark, create, move and indent Bookmarks • Set Permissions and Passwords • Create and Use Digital Signatures • Certify a PDF • Create a Security Envelope • Combine Files into a Single PDF • Update Watermarks, Headers and Footers • Insert, extract and replace pages in a PDF • Collaborate with Shared Review • Convert Microsoft Office Documents to Adobe PDF • Convert a Scanned Document into a PDF • Extract Pages and Export to Word or Excel • Add a Comment Using Sticky Notes • Use the Text Edits, Highlight, Shape and Pencil Tools • Sort and Filter Comments • Compare Documents • Remove sensitive information using Redaction • Create a Fill In PDF Form • Convert a Word form to PDF • Add Form Fields • Create a Text Field • Choose Text Field Properties • Calculate and Format Field Values • Create Check Boxes • and more

Designed for: CPAs and Professionals at all levels of an organization who create and modify PDF files and also need to understand PDF security and collaboration features

Recommended CPE: 8
Prerequisites: None
Event ID: ADOBE-L
Course Level: Update
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Advanced Consulting for CPAs: Enhancing and Expanding Your Client Relationships

All CPAs are consultants, even if we don't call it "consulting." CPAs provide a variety of expert accounting, financial and management-related services and must carefully manage interactions with clients. This course, based on Peter Block's legendary book "Flawless Consulting," is designed to help CPAs thoughtfully and successfully manage client communications and offer increased opportunities for building lasting and mutually beneficial client relationships.• (4 or 8-hour format available)

Objectives: Understand, enter into and foster client relationships • Manage client communications • Build lasting and mutually beneficial client relationships • Understand and deal with resistance • Discuss contracting: Overview, ground rules and agonies • Discover the difference between learning and teaching

Highlights: A consultant by any other name: Some definitions and distinctions • Techniques are not enough: "Flawless Consulting" and authenticity • The faces of resistance • Diagnosis to discovery: A whole system approach • Feedback: Concepts and skills • Implementation: Deciding doesn't get it done • Engagement: Innovative engagement • Consulting ethics: The shadow side of consulting • The heart of the matter: Learning over teaching

Designed for: CPAs or accountants providing public accounting, auditing and various consulting and advisory services

Recommended CPE: 8
Prerequisites: Management experience
Event ID: FCAS
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Michael Daigneault, Esq.

Annual Accounting Update for Industry

This is the definitive course to keep industry CPAs abreast of the latest updates on recent accounting standards including those that have just recently become effective - or those about to become effective (also available in 4-hour format).

Objectives: Be able to recognize how new accounting pronouncements affect you or your client's financial statements

Highlights: Fair value • Business combinations • International standards • Disclosure changes • Derivatives • Contingencies • Going concern • Subsequent events

Designed for: CPAs in industry and in professional practice interested in GAAP-based financial reporting

Recommended CPE: 8
Prerequisites: None
Event ID: AAUI
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Elizabeth Gantnier, CPA

Applying "Lean" Thinking to Making Employees Your Competitive Advantage

Lean thinking has probably been applied effectively throughout your organization - except in Human Resources. Yet, in the end, the survival of your company depends on its employees. In this fast-paced, interactive session, we will look at best practices that you can implement for finding and retaining high-value employees. The instructor has a great deal of experience in the people side of business, and he will share specifics on what works and what falls short.

Objectives: Learn new methods for looking at the workforce • Discover clever interview questions and methods • Gain practical advice on building supervisory competence • Understand "lean" thinking

Highlights: Legal ways to select good employees - hiring the best fit • Using a "Lean" culture to keep high value employees, and removing or remaking the bad ones • How to clone your top performers • Motivating and managing for the long term: Fast feedback for Gen X and Gen Y

Designed for: Leaders and supervisors that want higher customer service levels, a high performing culture and better retention of multiple generations

Recommended CPE: 4
Prerequisites: None, but can be used as a follow-up to "Applying Lean to Hiring"
Event ID: MECA
Course Level: Overview
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Strategic Management Business Management
Author/s: Karl Ahlrichs, SPHR

Are Generational Differences Helping or Hindering Your Team?

new

Generational differences have been a fact of business life for decades, but today's workforce has an unusual challenge – four dramatically different generations in the same workplace. Each of these age groups has different expectations and different demands. This session will address the most important concerns managers face when working with different generations and will offer solutions. (Available in 3, 4 or 6 hour format)

Objectives: To enable managers to create a workplace where each generation capitalizes on the strengths of the others, creating more productive work relationships.

Highlights: Understand the key characteristics that distinguish the generations • Identify factors that motivate different groups into action • Design programs, incentives and rewards to appeal to each generation • Create an engaging environment where everyone thrives

Designed for: CEOs, Managers and Practice Owners, Human Resource Managers

Recommended CPE: 6
Prerequisites: None
Event ID: GENDIF
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Sheila Birnbach

At the Helm in the Storm: Seven Survival Strategies for Leaders in Turbulent Times

These are difficult times. Professionals and their firms face special challenges. Never has leadership been so important – or seemingly so dangerous. With the press full of stories of fallen leaders, it seems like being a leader is both a risky and lonely position to hold. However, opportunities for leaders abound and there are many ways to weather the storm. This course is also available in a 4-hour format.

Objectives: Discover ways to improve your performance despite the stress of your job • Learn how proven survival strategies can help you succeed in the jungle out there • Learn how to bounce back from setbacks • Learn how to pick your battles and take the risks that matter

Highlights: Know what's killing you • Know why you're living • Know how to recover • Fight fear and despair • Take bold but cautious risks

Designed for: Anyone who is in a leadership position or aspires to be

Recommended CPE: 8
Prerequisites: Management experience
Event ID: FALTT
Course Level: Advanced
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci

Course Listing

Audit Risk - Beyond the Balance Sheet

This program will address both balance sheet and "beyond the balance sheet" risks, with the objective of minimizing auditor risk due to unmet expectations, as well as managing the board, risk management, economic analysis, behavioral drivers and credibility assessment. Available in 4 and 8 hour formats.

Objectives: Understand the totality of risks that concern CFOs • Learn to minimize auditor risk due to unmet expectations

Highlights: The big picture - how investors, analysts and the media impact the strategic, tactical and governance decisions of businesses, and why such expectations should be audited • Managing the board - how auditors can best address issues facing boards in an era of high public scrutiny, and why the auditors' own reputation can be protected by doing so • Risk management - how auditors should assess enterprise risk and address critical success factors through their procedures to meet stakeholder expectations • Economic analysis - how auditors should apply macro- and micro-economic analysis to assess the impact of business cycles on client investment and operating decisions, including how to measure and account for the economic effects of transactions • Behavioral drivers - how auditors should assess their clients' decision and accountability culture • Credibility assessment - how auditors should critically evaluate both business and financial capability of clients

Designed for: CPAs and other audit professionals who want to expand their knowledge of how business management and client culture could impact audit risk and the selection of audit procedures

Recommended CPE: 4
Prerequisites: Management experience
Event ID: ARBBS
Course Level: Intermediate
Format/s: Group Live
Field of Study: Finance
BLI Curriculum: Business Management
Author/s: Robert Tarola, CPA

Auditing Bits in Bytes™

Auditing Bits in Bytes™ is a series of eight individual sessions that guides professionals through the complete audit process from "A to Z" - providing practical tips and best practices for ensuring an effective and efficient financial statement audit in compliance with relevant professional and regulatory standards. This course can be offered in a full 8-hour day, in 2-4 hour sessions, or in bytes of eight 2-hour webcast sessions.

Objectives: Upon completion of this course, the participant will be able to explain the critical elements of an effective and efficient audit process from "A to Z" - starting with Pre-Engagement Planning Activities, and going all the way through Engagement Wrap-up and Quality Control.

Highlights: Pre-Engagement Planning Activities • Preliminary Planning Activities • Internal Control Considerations • Assessing and Responsing to Risk • Substantive Testing • Engagement Wrap-up • Identifying, Evaluating and Communicating Internal Control Deficiencies • Quality Control Considerations

Designed for: Anyone who is new to auditing or desires a refresher in how to perform effective and efficient financial statement audits for non-issuers in accordance with professional and regulatory standards (Generally Accepted Auditing Standards and Yellow Book)

Recommended CPE: 8
Prerequisites: None
Event ID: ABB
Course Level: Basic
Format/s: Group Live, Webcast – 2 hour, Self Study: Video On-Demand
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Audits in Accordance with Yellow Book new

Yellow Book and OMB Circular A-133 reporting entities have complex and unique financial statement audit, compliance and reporting issues. Deficiencies in these types of audit engagements are common. This course will reduce the likelihood of non-compliance with relevant professional and regulatory auditing and reporting standards.

Objectives: Be able to effectively and efficiently perform audits in accordance with Generally Accepted Government Standards and OMB Circular A-133 • Learn what must be done beyond the financial statement audit in order to issue required reports on internal controls and compliance • Master designing, performing and documenting effective and efficient tests of compliance requirements

Highlights: The fundamental differences between Generally Accepted Auditing Standards and Generally Accepted Government Standards • Understanding risk assessment factors above those associated with a financial statement audit only • Identifying, documenting and communicating the impact of internal control deficiencies and compliance audit findings to the client • Common peer review deficiencies

Designed for: Anyone who performs or reviews Yellow Book or A-133 audit engagements

Recommended CPE: 8
Prerequisites: None
Event ID: A133
Course Level: Basic
Format/s: Group Live
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Avoiding Bankruptcy - Surviving the Recession (A Case Study Approach)

Bankruptcy isn't a four letter word, in fact it can serve as a life line for a business that is struggling to stay above water. But how can you avoid filing even when everyone says that's what you should do Strategies and tactics for avoiding the bankruptcy option will be covered in this course, along with mastering the methodology to survive and even thrive. In order to best illustrate the steps to take, this course uses a case study approach. (Available in 4 or 8 hour format)

Objectives: Identify and execute strategies - based on real world events - that will enable you to stave off bankruptcy

Highlights: Using real world events to create viable strategies • Key performance indicators • Methodology to assist in developing a course of action to survive and thrive

Designed for: Controllers, CFOs, as well as partners of CPA firms

Recommended CPE: 8
Prerequisites: Management experience
Event ID: ABSR
Course Level: Advanced
Format/s: Group Live
Field of Study: Economics
BLI Curriculum: Business Management
Author/s: Frank Ryan, CPA, MBA

Awesome Financial Presentations

new

Have you ever presented financial results to a board and been confronted with glassy-eyed stares and stifled yawns, only to be followed with questions two weeks later? It would be so much more productive for both you and the organization if your presentation was understood the first time. Learn the techniques for translating financial information into compelling and useful presentations.

Objectives: In this course students will learn techniques for presenting technical financial data for non-financial audiences. We will cover Power Point techniques, oral presentation skills, and communication styles.

Highlights: Preparing Power Point slides for impact • De-cluttering slides • Charts vs. Bullet Points • Slide do's and don'ts • Tailoring the presentation to the audience • Understanding the four communication styles

Designed for: Anyone who would like to learn how to successfully present an idea

Recommended CPE: 8
Prerequisites: None
Event ID: AWESOME
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Jennifer Elder, CPA

The Balanced Leader-Manager: Using the Right Leadership Style

The demands on mid- and high-level executives require them to effectively display both management and leadership skills. However, often individuals struggle with what distinguishes these different yet related competencies, including how to effectively balance day-to-day responsibilities and long-term strategic objectives. Only those who have strong skills as both manager and leader can achieve and maintain personal and organizational success.

Objectives: Upon completion of this course, the participant will be able to: • Explain the importance of balancing both leader and manager roles in order to be successful with customers, employees, in company profitability and in personal careers • Describe differences between leading and managing, identifying the competencies to be effective as both leader and manager • Discuss the four primary leadership styles and the factors that influence them

Highlights: Leading and managing • Four primary leadership styles • Self-assessment tool • Use of 360 degree feedback

Designed for: All mid- to high-level managers and executives

Recommended CPE: 4
Prerequisites: Mid-level management experience
Event ID: BLM
Course Level: Advanced
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Jennifer Louis, CPA

Course Listing

Balanced Scorecard

Imagine the impact on overall performance if your organization successfully upgraded the way it operated. What would that mean to the future financial success of your operation, employees and customers

Objectives: Manage a seven-step process that will successfully effect organizational change by significantly improving performance, morale and customer service • Learn to substantially minimize problems

Highlights: Conduct organizational assessments by change area using observations, focus groups, formal/informal interviews and written feedback • Conduct team facilitation workshops to: Define strategic focus/mission for each change area; develop goals, objectives and strategies for each change area; identify performance measures for each change area; complete a team accountability matrix; identify team educational/training needs necessary to affect change • Communicate performance based on performance measures and accountability matrix • Conduct team meetings to evaluate performance and adjust direction

Designed for: Finance professionals

Recommended CPE: 8
Prerequisites: None
Event ID: BSC
Course Level: Overview
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Performance Management Business Management
Author/s: Ray Perry

A Basic Overview for Non-CPAs and Those Charged with Governance of the Most Critical Issues Faced by the Accouting & Auditing Profession Today

This course is for any Non-CPA who is charged with governance on financial matters and need a basic understanding of common accounting and auditing issues impacting external public accountants. This course will explain the basics using terminology and exercises everyone can understand.

Objectives: Upon completion of this course, participants will be able to explain the basics of the most significant accounting and auditing issues facing public accountants today.

Highlights: What is the difference between an audit, compilation and review • Why it is important for external accountants to maintain independence and objectivity, especially when performing multiple services for a client • Defining basic accounting and auditing lingo • Fraud scandals and how they impacted the public accounting industry • Sarbanes-Oxley Act overview, including the "trickle-down" effect to nonpublicly-traded entities • The COSO Report: Internal Controls - Integrated Framework - • SAS No. 70, use of outside service organizations • Planned convergence with international financial reporting standards • Suggested new accounting standards for nonpublic entities (Little GAAP) • Risk-based auditing concepts • What is Yellow Book or government auditing standards

Designed for: Any non-CPA who desires a very basic understanding of key audit and accounting issues faced by the public accounting profession today.

Recommended CPE: 8
Prerequisites: None
Event ID: NTAA
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

The Best Business Books Ever Written

Nearly 3,000 business books are published each year. With today's busy and demanding schedules, do you feel you don't devote enough time to reading and absorbing new ideas?

Objectives: Learn how to analyze a book, comprehend its structure, dissect its main argument, and consider the author's bias • Understand the four levels of reading and when to apply each one • Explore hundreds of business books and gain an elementary understanding of the major ideas they contain that can be utilized in your business • Select books you want to read, and those you want your associates, colleagues and clients to read

Highlights: Explore books written on management, marketing, leadership, sales, customer service, psychology and economics • Learn how to read a book, as taught by Mortimer Adler and Charles Van Doren • A comprehensive bibliography will be discussed, and a short synopsis of each book presented • The instructors will debate and defend their choice of the twenty best business books ever written, and their ten favorite authors

Designed for: Any professional who wants to gain a competitive advantage by understanding the leading thinkers and theories contained in the business books of yesterday and today

Recommended CPE: 8
Prerequisites: Management experience
Event ID: BBBYSR
Course Level: Intermediate
Format/s: Group Live
Field of Study: Marketing
BLI Curriculum: Leadership Development
Author/s: Ronald Baker, CPA

Best Practices for Audits in Compliance with Government Auditing Standards and OMB Circular A-133 new

Often, entities that require A-133 audits are the least-profitable clients for CPA firms. This is sometimes a direct result of engagement teams being less familiar with the compliance and testing requirements for these types of engagements, as well as best practices for boosting quality and profitability. This course will provide proven tips and techniques for performing a more effective and efficient audit of federal financial awards.

Objectives: To explain the additional professional and regulatory requirements of a Government Auditing Standards (Yellow Book) and OMB Circular A-133 engagement.

Highlights: Obtain an update of current issues and trends related to compliance audit engagements • Discover the difference between GAAS (in compliance with the SASs) and GAS/GAGAS (Yellow Book) audits • Understand risk-assessment requirements beyond the financial statement audit when performing compliance audit • Learn what must be done beyond the financial statement audit in order to issue reports on internal controls and compliance for major programs • Master designing and documenting effective and efficient tests of the A-133 compliance requirements • Practice considering, documenting, and communicating the impact of internal control deficiencies and compliance audit findings to the client

Designed for: Anyone involved with preparing for, assisting with, or otherwise overseeing the results of an entity's audit in compliance with Government Auditing Standards and OMB Circular A-133

Recommended CPE: 8
Prerequisites: None
Event ID: AWAC
Course Level: Basic
Format/s: Group Live
Field of Study: Auditing (Gvmt)
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Best Practices in Accounting and Finance Writing: Being Clear and Accurate

Readers of finance and accounting documents expect the information to be complete, accurate, and readable - neither overly simplistic nor complex. This program will enable participants to select and apply language that delivers clear and readable documents, reports, letters, and emails.

Objectives: Choose words that are precise and familiar • Eliminate unnecessary words and limit ambiguity • Write sentences that make ideas clear • Use verbs to clarify meaning

Highlights: Understand the difference between appropriately and overly technical word choices • Make sentences communicate meaning precisely and without excess words

Designed for: Professionals who must write or edit technical material that must make sense and be complete, not simplistic

Recommended CPE: 2
Prerequisites: None
Event ID: BPAFW
Course Level: Overview
Format/s: Webcast - 2 hour, Self Study: Video On-Demand
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Best Practices in Accounting and Finance Writing: Putting Ideas in Order

This course will show you how to manage your thinking and create an organized document that highlights what you want your reader to know, think, and do. Participants will learn how to present ideas in the proper sequence so that readers will understand their writing.

Objectives: Know how to organize technical material so that a reader can understand your supporting logic and identify what you want them to do • Be able to review a document and determine whether it makes sense

Highlights: Use the upside down triangle to manage thinking and communicate effectively • Recognize what enables a reader to identify and respond to a message • Identify messages and sub-messages

Designed for: Professionals who must write or edit technical material that must make sense and be complete, not simplistic

Recommended CPE: 2
Prerequisites: None
Event ID: BPAFPIO
Course Level: Overview
Format/s: Webcast - 2 hour, Self Study: Video On-Demand
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Course Listing

Best Practices in Writing -for the Financial Services Professional

Good writing skills are essential in our jobs. We write more than ever in e-mail, proposals, presentations, faxes and even on our PDAs. The truth is, what we write suggests to the receiver how clearly we understand what we are writing about. It can begin the process of getting the recipient to agree with our points and to get the right work done. The development of writing skills is a key need for professionals at all levels of an organization.

Objectives: Organize ideas to ensure the reader knows what to know or think or do • Write sentences that make sense to the writer and reader • Identify the main and support messages • Use a single question to sort information into "needed" and "not needed" information

Highlights: Organize ideas and manage the reader so that the written information communicates what the writer intends to say • Use the planning process to make writing productive and faster • Use words that do not "dumb down" technical information and still make sense to the reader

Designed for: Professionals who write as part of their work responsibilities, wish to make the writing process comfortable and would like to start and complete documents more quickly

Recommended CPE: 8
Prerequisites: None
Event ID: MBW
Course Level: Overview
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development Communications Skills
Author/s: Lin Kroeger, CMC

Better Business Writing

Now more than ever, business people are inundated with written communication - faxes, letters, e-mail, memos, reports, documents and more. Learn the tips to ensuring your correspondence is the one that gets read. Discover how to sharpen your business writing skills so that the message you write gets you the reaction you want.

Objectives: Sharpen your business writing skills so that the message you write gets read

Highlights: Examine the types of written communication • Sharpen your business writing skills • Tips to make sure your correspondence gets read

Designed for: All

Recommended CPE: 3
Prerequisites: none
Event ID: BBW
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Cathleen Hanson, Carol Haislip

Better Forecasting Using Backcasting new

Your strategic plan is for 5 years. Your forecast is for 1 year. But there's no link between the two. Shouldn't the next year of your operations really be tied to and support your 5 year plan? Learn how you can use "backcasting" to bridge the gap. Backcasting, a technique successfully used by Nike, was originally developed to address sustainability but can be used by any organization that wants to link its long-term strategy with its short-term forecast.

Objectives: Learn about and practice the process to first look to the future and the desired end-state, then assess the current situation, perform gap analysis, and finally develop short, mid, and long-range goals to take your organization from where you are to where you want to be.

Highlights: Perform visioning • Conduct baseline mapping • Identify desired short, mid, and long-range goals • Develop creative solutions • Prioritize • Prepare implementation and measurement plan

Designed for: Anyone who would like to merge their short-term forecasting with their strategic planning

Recommended CPE: 8
Prerequisites: None
Event ID: BACKCAST
Course Level: Basic
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Beyond Ethics: Confronting the Challenge of Integrity new

Ask CPAs to list their values and integrity will always appear near the top of the list. Ask them what integrity means, though, and many answers emerge. It turns out that there is considerable debate about integrity and what it means in a complex world of competing values. But, there is little debate that integrity is at the heart of the profession.

Objectives: This course is designed to be a game-changer. The focus is not on answers but on questions. It is designed to help CPAs re-think their business and their lives in ways that will not only make them more ethical, but also more valuable contributors to their companies, their firms, their organizations, and their communities.

Highlights: Integriy: What it is and isn't • Does ANYBODY have it? • Why it's so valuable • And ethics • And honesty • And how it can change your life

Designed for: Anyone who might wrestle with ethical issues, especially anyone in a leadership role.

Recommended CPE: 4
Prerequisites: None
Event ID: BECCI
Course Level: Basic
Format/s: Group Live
Field of Study: Ethics - Behavioral
BLI Curriculum: Strategic Management
Author/s: Greg Conderacci

Beyond the Buzzwords with Hiring: Apply "Lean" Processes and Fix the Way Your Organization Hires

This is a fast-paced look at clever and aggressive new hiring processes that save time and effort and are legally compliant. Mixing "Lean" theory, fresh case studies and psychological theory, the instructor covers new ground with a fresh, data-driven look at the hiring process. This workshop begins with a passionate indictment of the "status quo", progresses with "how-to" content in the middle, and ends with an inspirational call to action. The instructor will challenge how your organization currently hires and will give practical tips and advice on making clever process changes that produce real results, both in hiring and retention. Bad hires come from bad knowledge, and this session shares good, practical secrets.

Objectives: Look beyond the buzzwords and rethink the hiring process instead of tweaking business as usual • Review the issue from many sides: the five things applicants want, the four things managers demand, the three things HR would like, the two things lawyers expect, and the one thing the CEO needs

Highlights: The top six reasons why hiring is back as a front-burner issue • Why very little has changed in 50 years • Why hiring managers are blocking new hiring methods • Sincere but failed tactics • Why values and attitude questions are more important than skill questions • How to fix the problem: Real-life case studies about new methods

Designed for: Executives and leaders who are disappointed with their organization's hiring process, or want to align their human resources with "Lean" thinking

Recommended CPE: 4
Prerequisites: Management/HR experience
Event ID: BBWH
Course Level: Advanced
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Karl Ahlrichs, SPHR

BLI's Ethics Update for CPAs in Business & Industry

Receive a fast-paced overview of ethical standards promulgated by the AICPA and State Society and State Board authorities as they apply to CPAs working in the business world. We will use case studies and group discussion to examine the connections between ethical principles, formal rules and the profession's public responsibility. The ethical dimensions of the responsibilities CPAs have when preparing financial statements will also be discussed. Learn how to apply the independence rules of Interpretation 101-3 when providing both attest and non-attest (management advisory) services for closely held clients. (Content can be customized to client needs)

Objectives: Emphasis will be on the practitioners who provide compilations, reviews or audits as well as a range of other services for closely held businesses. Cases and examples will be used extensively.

Highlights: AICPA Ethics Code for practitioners in industry • The current regulatory environment for public and non-public companies - how do they compare • The public interest and professional ethics - where we have been and where are headed • Ethical dimensions of financial reporting • Internal control, management override and organizational culture • AICPA & PICPA Ethics Codes • Independence and ethics alert: Current issues

Designed for: Accountants in industry who prepare financial statements or are involved in the finance function and need an overview of the ethical requirements that govern their working relationships and the discharge of their public responsibilities.

Recommended CPE: 4
Prerequisites: None
Event ID: EUBI
Course Level: Update
Format/s: Group Live
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Ray Thompson, CMA, CFM, CBA

Course Listing

Blue Ocean Innovation: Market-Taker to Market-Maker

In their ground-breaking book "Blue Ocean Strategies, How to Create Uncontested Market Space and Make the Competition Irrelevant," Chan Kim and Ren,e Mauborgne argue that traditional competition-based strategies (red ocean strategies) are not sufficient to sustain high performance. Instead, you have to create "blue oceans," the unknown market space, untainted by competition, where demand is created rather than fought over. This course will give participants new insight into innovative business strategies.

Objectives: Gain an understanding of the key concepts and tools introduced in "Blue Ocean Strategies" • Understand how these concepts can help organizations unlock there own market-making engine of value and innovation

Highlights: Creating blue oceans: What does that mean • Explore opportunities to create blue oceans • How to strip away conventional wisdom, deconstruct market obstacles and boundaries and form a "reconstructionist view" • Why innovators should not accept limiting market structures • Moving from supply to demand: From a focus on competing to a focus on value innovation-creating innovative value to unlock new demand • Understand why focusing on new market demand allows organizations to generate diversified, higher-quality and more sustaining revenue sources

Designed for: Professionals seeking innovative business strategies

Recommended CPE: 2
Prerequisites: None
Event ID: BOI
Course Level: Overview
Format/s: Webcast - 2 hour
Field of Study: Marketing
BLI Curriculum: Strategic Management
Author/s: R. Donald McDaniel

Build a Team by Teambuilding!

Teamwork requires a shared goal and a problem or challenge that can only be dealt with by sharing knowledge, perspective and effort. Different problems require different teams and effective communication is required to support team structure.

Objectives: Address problems • Discover the teams and communication skills needed to create the dynamics in a multi-layered group

Highlights: Differentiate between authority and partnering • Define "real problems" and issues • Acquire communication skills to learn to listen, understand and affirm • Define kinds of teams and how to structure them • Examine different types of problems • Identify types of teams and necessary structuring • Build a team using a practical process • Use communication effectively, especially dialogue • Use interaction and role clarity to increase creativity

Designed for: Professionals who must create, lead and/or participate in teams that need to achieve their targeted outcomes

Recommended CPE: 8
Prerequisites: None
Event ID: TCPC
Course Level: Overview
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Build Your Book of Business with Better Brand Buzz

Buzz, commonly called word of mouth, is one of the most powerful (and least expensive) tools to increase business, yet it is rarely used effectively. This session gives you tips and tactics on spreading the word, including how to package and promote yourself using state-of-the art approaches from social sciences, marketing and even medicine. Can you create an epidemic of demand for your services? Only if your buzz is contagious enough. (This course is also available in a 4 hour format.)

Objectives: Gain a clear understanding of what "buzz" is and how it can be leveraged to improve your business • Identify the five secrets of really effective buzz • Anayze low-cost approaches to using buzz • Decide on the right kind of buzz for your firm • Defend against "bad buzz"

Highlights: Highly-interactive • Get hands-on experience that you can use immediately • Combine proven marketing and sociological techniques in an easy-to-use format

Designed for: Industry, practice or firm leaders, planners, and marketing officers

Recommended CPE: 8
Prerequisites: None
Event ID: BUZZ
Course Level: Overview
Format/s: Group Live
Field of Study: Marketing
BLI Curriculum: Communications Skills
Author/s: Greg Conderacci

Building a Culture of Conversation: Communication with a Purpose for Results

From new staff member to highly experienced, long-term executives, employees need to converse regularly to clarify direction, priority and expectations. Organizations that don't encourage and accommodate conversation tend not to hear information that can foster creative decision-making, innovative ideas and solutions, and improved productivity and general functioning of that organization. Conversation is not just coffee klatsching -- it's dialogue that helps people connect, understand issues and personalities, and gain commitment to action. Ultimately, organizations with strong conversational cultures can move and change faster than their competitors.

Objectives: Define conversation and its role in the organization • Identify patterns of conversations that encourage problem resolution, information sharing and commitment building • Practice conversation patterns that encourage sharing, challenging, and making commitments to issues and initiatives • Describe approaches to developing a knowledge-sharing, opinion-elucidating culture through conversation

Highlights: Conversation structures and cue cards to develop skill in conversation • Increase participant capability in gaining commitment and buy-in to organization initiatives and change

Designed for: Any professional who wants to create stronger interpersonal skills in a work team or organization

Recommended CPE: 8
Prerequisites: None
Event ID: BCCC
Course Level: Overview
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Building an Adaptive Organization

Organizations that assimilate the impact of increased competition and cost pressures into their strategy and business processes are better prepared to capitalize on changes in market conditions. This course is designed for top and mid-level executives who are preparing for, or are experiencing a major change initiative.

Objectives: Be able to present a roadmap of the major phases in managing change • Learn to assess the organization's capability and willingness to adapt • Describe and utilize tools to manage and implement change effectively

Highlights: How to maximize the use of customer input in the planning process • How to develop a change management strategy • Realigning processes, roles and responsibilities • The role of the leadership team in managing change • Overcoming resistance to change • Implementing a communication structure

Designed for: Senior level executives and their leadership teams; department directors and managers; human resources professionals; departments / individuals responsible for new technology and business processes; organizations that are restructuring because of major change

Recommended CPE: 4
Prerequisites: Management experience
Event ID: BAO
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Strategic Management
Author/s: Alan Patterson

Business Development Skills for Accountants

In today's competitive market, business development is critical to survival. Business development can be defined as attracting new business and retaining quality business. This is a challenging task one that requires knowledge, experience, patience, and a plan. Business development does not happen overnight. It is a process of developing relationships over time and having a plan in place in order to achieve your goals the earlier that a professional understands the process of business development, the more profitable to the organization they become. Participants of this course will learn the skills necessary to attract new business and develop relationships to retain current business.

Objectives: Be able to discuss your companys mission statement and values • Know Be able to discuss in detail the characteristics of your industry • Know how to analyze your competitors strengths and weaknesses • Develop your social and professional network • Develop a strategic plan for the coming year

Highlights: Analyzing your current network and uncovering potential business opportunities • Know the characteristics of your industry and how your industry interacts with other industries • Developing a strategy to cultivate new business from identified prospects • Developing a strategic plan for the coming year and setting dates for deliverables

Designed for: Accounting, financial, and managerial professionals who want to grow their business

Recommended CPE: 2
Prerequisites: None
Event ID: BDS
Course Level: Basic
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Peter Margaritis, CPA, MAcc

Business Development: Distinctions Between Marketing and Sales new

Is it marketing or is it sales? And does it make a difference? This short course explores those key questions - and their implications for growing your business.

Objectives: Discusses the differences among the "Big Three concepts in business development: sales, marketing and wasting your time and money • Learn tips for improving the first two and avoiding the third

Highlights: The most important thing sales and marketing professionals can do • The biggest mistake • Building better brand buzz • "Karma-based" marketing - and how it can work for you

Designed for: Those who want to grow their business

Recommended CPE: 1
Prerequisites: Some experience in business development
Event ID: DMBD
Course Level: Basic
Format/s: Webcast - 1 hour, Self Study: Video On-Demand
Field of Study: Social Environment of Business
BLI Curriculum: Communications Skills
Author/s: Greg Conderacci

Business Dining Etiquette

Be confident in any dining situation, whether with friends or business associates. Learn the proper use of utensils, American and Continental styles of dining and other dining do's and don'ts. Know not only how to handle yourself, but also learn the history behind many of our customs. Impress the most important of clients, and focus on making the sale instead of which fork to use. This program is available in a minimum of two-hour format.

Objectives: Ensure that company representatives know all the rules of the table, enabling them to focus on conversation and business and to represent the company professionally

Highlights: American and continental styles of dining • Eating various foods • Understanding place settings • Proper seating • Taking a client to lunch/dinner • Toasting • Handling oneself at the table

Designed for: Financial Professionals

Recommended CPE: 0
Prerequisites: None
Event ID: BDE
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Cathleen Hanson, Carol Haislip

The Business of the Future (for Industry)

Today's company is challenged by a variety of factors: new technologies, intensified competition, continued consolidation, a shrinking labor pool, more sophisticated customers, and downward pressure on profit margins.

Objectives: Understand the "Old Business Equation" and why it prevents companies from achieving excellence and a better quality of life • Learn the "New Business Equation" and why it is a superior paradigm for today's companies • Emphasizes the intellectual capital economy that all businesses operate in today

Highlights: Knowledge workers are the fastest growing portion of the labor market - why that is critical • How companies today sell Intellectual Capital (IC) • The three components of IC and how each one can be leveraged to create wealth for customers • Why your employees are volunteers and not assets or resources • How the focus on revenue growth and market share can seriously impair your company's profitability, and what you can do about it • Why the traditional metrics of efficiency are no longer relevant to measuring the effectiveness of knowledge workers • The importance of customer selection and the revolutionary "Adaptive Capacity Model" • The value proposition you offer your customers • Critical success factors and key predictive indicators for your business • Best practices from successful company's around the world

Designed for: Any executive in industry who is interested in being among the leaders in the business world

Recommended CPE: 8
Prerequisites: Management experience
Event ID: BOFI
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development
Author/s: Ronald Baker, CPA

Business Planning: A Managerial Accounting Approach

A good business plan doesn't have to be complicated to be effective. This course offers an operationally oriented "nuts and bolts" approach to business planning that is superior to the off the shelf software packages that simply plug numerical guesses into financial statements. Available in formats from 2 to 8 hours.

Objectives: Be able to apply a methodical, pragmatic five step planning process to your own business organization

Highlights: Review of the five steps which encompass the business model, production / staffing capacity and sales volume, cost structures, revenue and pricing strategies, and financial statement modeling • Flexible budgeting • Six sigma sampling techniques • Process flow analysis • Activity based costing • Game theory • Cash flow ratio analysis

Designed for: Board members and corporate officers with responsibility for business planning, as well as mid-level managers who provide them with relevant information

Recommended CPE: 8
Prerequisites: Business planning and risk management experience
Event ID: BPLAN
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Michael Kraten, PhD

Business Strategy Development: More Than Operational Planning

new

While most organizations engage in a yearly ritual for preparing budgets, few use a process to dig into marketplace conditions and customer needs, and to define their unique value within this context. This session sets out a practical process for developing a strategy based on collecting the best data, developing a strategic vision, identifying critical decisions, and aligning the organization for effective execution.

Objectives: Describe a process for strategic planning and deployment • Apply the process to a current business case • Align the organization for strategy deployment

Highlights: Determine what is important to the business and what are the sources of data • Discuss the role of the leadership team in strategy development and deployment • Examine policies, decisions, and tactics that support the strategy • Discuss what actions are required

Designed for: C-Suite executives, Finance and accounting directors and managers, Firm partners, Leadership teams responsible for strategy development

Recommended CPE: 8
Prerequisites: Management/Leadership experience
Event ID: BSD
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Strategic Management
Author/s: Alan Patterson

Business Valuations in a SSVS• World *(*Statement on Standards for Valuation Services)*

Whether you write one valuation a year or one hundred, the AICPA's new Statement on Standards for Valuation Services affects you. What valuation principles and theory must you master — what skills must you possess — to comply with the SSVS This course gives a roadmap. (Can be 1 hour keynote; or 3 hours, or 4 hours)

Objectives: Students will learn fundamental business valuation principles -- and the "dos and don'ts" required to comply with the SSVS.

Highlights: Thompson vs. Commissioner • Standards • Conflicts • Rules & Regulations • Income • Market • Asset Approaches & Methods • Valuation Adjustments (discounts) • Data Sources

Designed for: Accountants without formal training doing business valuations

Recommended CPE: 2
Prerequisites: None
Event ID: SSVS
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Brad Davidson

Course Listing

Caesar's Wife: Tipping the Delicate Balance of Leadership and Ethics

In today's complicated world, CPAs carry an increasing burden of public trust. As in the past, they are expected to give sound, ethical advice on accounting matters. Yet, what used to be an end is now just a beginning. The press, the government, business leaders and others look to CPAs to bring judgment, honesty, clarity and transparency to many murky issues. This course goes beyond just "the rules" to discuss broader and deeper issues affecting the profession and your role in it.

Objectives: Help participants grapple with difficult ethical dilemmas CPAs face in the private and public sectors • What is the function of ethics in society today - and why is it so critical • Why isn't just "following the rules" enough • What does it mean to be a leader and a CPA • How high should the ethical "bar" be set? • Is it "Caesar's Wife" (beyond suspicion)?

Highlights: Interactive format that drives home the difficulty of reaching ethical decisions • Challenging and thought-provoking case-based discussion • Designed to expand participants' thinking beyond traditional CPA roles

Designed for: Anyone who might wrestle with ethical issues, especially anyone in a leadership role

Recommended CPE: 4
Prerequisites: Management experience
Event ID: TDBL
Course Level: Intermediate
Format/s: Group Live, Webcast - 4 hour,
Field of Study: Ethics - Behavioral
BLI Curriculum: Strategic Management
Author/s: Greg Conderacci

Calm in the Midst of Chaos: Techniques & Tips for Managing Stress Levels During Busy Times

new

Learn essential skills for managing well-being during extremely demanding times in your professional and personal lives. This interactive session is designed to bring fresh perspective and tangible new strategies to reduce stress levels and increase productivity and positivity.

Objectives: Participants will learn: • Top 10 Time Wasters: Want to eliminate white space in your life? Try these. • Top 10 Stress Boosters: Want to increase stress? Try these. • Best Practice for Increasing Well Being despite a Busy Reality • Personal Strategic Planning • Prioritization • Developing Positive Habits

Highlights: The reality is that we are living in a fast-moving and highly demanding environment right now with the likelihood of change picking up its pace, rather than slowing down. Our ability to maintain our equilibrium and flourish in the midst of this relies on our ability to manage ourselves, our thinking and our actions. This workshop is designed to integrate the best practices of strategic thinking and strength-based personal leadership to develop personalized strategies to maintaining calm in the midst of chaos.

Designed for: Anyone who wants to increase their well-being whether that is measured in personal life satisfaction or in productivity and professional recognition.

Recommended CPE: 4
Prerequisites: None
Event ID: CALM
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Business Management
Author/s: Gretchen Pisano

Career Management: What's Next for You?

CPA firms invest thousands of dollars annually to increase the technical knowledge of staff during the first five years of employment. There is little to no investment in their non-technical (soft) skills prior to promotion to manager. Once they are promoted to manager they are asked to build and maintain client relationships with little to no training. The competitive nature of the business world rewards those who have the skills to develop client loyalty, referrals, and cross selling of services.The challenge is to achieve balance between technical and non-technical skills in order to reduce the learning curve once staff is promoted into management positions. This course will prepare future managers to win business, increase productivity, and increase the firms profits. (Available in 2 - 4-hour formats)

Objectives: Review Effective Business Communication 101 (written and verbal skills) • Develop Work / Life management skills • Learn how to behave like a professional and gain an understanding of business etiquette • Understand the expectations of Boomer Bosses

Highlights: How to write more concisely by recognizing opportunities to write in an active voice • Ten ways to become a better business writer • Use technology to manage your time • Increase productivity • Identify new opportunities to create an entrepreneurial network • Analyze professional and social networks • Eliminate your fear of public speaking • Prepare powerful PowerPoints • Use effective body language during your presentation

Designed for: The accounting professional who is in their first 5 years in the profession

Recommended CPE: 4
Prerequisites: None
Event ID: CAREER
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Peter Margaritis, CPA, MAcc

CFO versus HR - Thinking Inside the Box

As CFOs rise in power within organizations, the rest of the company can become puzzled by the mindset and decision style of the financial leader. These departments, through solid metrics and a strategic alignment with the bottom line, can make a significant impact on the organization. This workshop will build the understanding and communication patterns needed to help other departments understand the CFO, and give the CFO data to better communicate.

Objectives: Gain a better understanding of a typical CFO, a position that is often viewed with fear and mistrust • Build more effective, more interactive working relationships with your CFO • Focus on three areas: a quick review of the "real life" world of the CFO, a view of the world and the workforce through the eyes of a CFO, and a list of "best practices" that work effectively in communicating with (and gaining the trust of) a CFO

Highlights: Gain new tools to use, including new assessment language to better describe the CFO mindset • Best practices in communication with financial types • A "cheat sheet" of financial terms that will help build credibility

Designed for: Departments and individuals that report to, or work with, finance departments in general and CFOs in particular

Recommended CPE: 4
Prerequisites: Management experience
Event ID: TITB
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Communications Skills
Author/s: Karl Ahlrichs, SPHR

Challenge Thinking to Succeed

Great leaders seek opportunities to hear and understand bad news, according to Michael Collins in "Good to Great." Organizations that teach people how to surface conflicting views and manage the resulting conversations respond quickly to change and encounter fewer surprises. Participants will learn ways to surface and manage conflict and will develop strategies for encouraging people to identify the "uglies," with the intent to strengthen the organization. This program is also available in a 4-hour format.

Objectives: Identify ways to surface and manage conflict • Develop techniques for encouraging precise, critical thinking that includes the "uglies" and contingency thinking

Highlights: Practice conflict management that increases clear thinking • Review leader techniques for probing thinking • Develop conversation techniques that allow divergent thinking

Designed for: Leaders who recognize speed and execution are impossible without understanding the whole picture

Recommended CPE: 8
Prerequisites: Management experience
Event ID: LUAC
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Communications Skills
Author/s: Lin Kroeger, CMC

Challenges for Financial Professionals new

The leadership role of the CFO / Controller has never been more important and governance and effective management controls become critical in that role. Learn guidance to the financial executive in dealing with the financial and accounting issues of the volatile financial markets in the current global economy. Useful tools will be explored as they relate to the major risks an organization faces and how to effectively use those tools in strategic and operational roles of the CFO / Controller. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Understand difficult, emerging accounting issues – including IFRS, ASC, fair value, derivatives, Dodd-Frank Bill, health care reform • Evaluate the effectiveness of the Human Resources programs within an organization to include personnel evaluations, pay, process controls in hiring • Review programs for dealing with difficult people • Evaluate the effectiveness of ethics programs and the tone at the top relative to risk management • Understand factors influencing the debt and equity mix to manage growth and risk • Be able to manage growth • Develop a daily flash report of internal reporting to monitor critical enterprise risks

Highlights: Accounting and legislative process control risks • Managing the debt and equity balance • The way ahead for the CFO / Controller in 2011 and beyond

Designed for: Controllers, CFOs, COO's and CEO's

Recommended CPE: 8
Prerequisites: Financial executive experience
Event ID: CHALCFO
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Strategic Management
Author/s: Frank Ryan, CPA, MBA

Course Listing

Champions of Trust

Trust, trust, trust - never has there been so much interest in trust. Amazon lists 20 books on the subject, including "The Speed of Trust" by Stephen M. R. Covey (son of Stephen Covey), fast becoming an instant business best seller. Google the phrase "trust me" and you get 120 million choices. In a world hungry for trust, you can become a champion of it - if you use a few key approaches - some ancient, some very modern. This program is also available in a 4-hour format and as a keynote speech.

Objectives: To give you pathways to reaching, retaining and restoring trust

Highlights: Running on trust. How far can you get • When you need it most: trusting in troubled times • What the bestsellers don't tell you about trust • Duh Why your employees and your kids don't trust you • Packaging trust for the market • Trust: fact and fiction • Why people do or don't trust • Sure paths to trust - and a few detours • Trust and performance • Trust and risk • Trust and selling

Designed for: Anyone in a leadership position or aspires to be
Recommended CPE: 8
Prerequisites: Management experience
Event ID: COT8
Course Level: Intermediate
Format/s: Group Live
Field of Study: Ethics - Behavioral
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci

Change Efforts that Stick

Even the most well-intentioned and well-funded change efforts can be brought to a halt by individuals and organizations that are not prepared for, or willing to take, the journey that change requires. Learn how to build an effective system-wide change effort, discover practical tools that will help you ensure success, and understand ways you can work with those who champion it as well as those who resist. This course will show you the components that underlie a change system, provide you with the knowledge to work with the flow of people's individual change, and equip you with a tool set for change no matter how big or small.

Objectives: Understand the components of any successful change effort from a systems perspective • Learn how to gauge the personal and organizational change temperature and move the organization through the stages of change • Build the intellectual and emotional stories that inspire organizational change • Be able to utilize a set of practical tools to effectively navigate through the change system

Highlights: What is the message of the change system? • Who is the team that leads and why? • What is the plan? • Who is coming along and why? • How can we lead change from any seat in the house? • How can we create early success? • Working with champions and resisters • Sticky communication: Avoiding flavor-of-the-month change

Designed for: People responsible for leading or managing change within their organizations

Recommended CPE: 8
Prerequisites: Organizational experience in change, both successful and not so successful
Event ID: CES
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Gretchen Pisano

Cloud Computing Unraveled – Issues and Trends Update new

Cloud computing is already here, widely available and already in use by most business professionals. This course will present an overview of current trends in cloud computing including: collaboration, Software-as-a-service, application and enterprise hosting, elastic computing, and also unravel considerations from data storage security to choosing cloud based applications and services. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Understand current trends in cloud computing, storage and SaaS • Explore a variety of providers of SaaS solutions for the accounting industry • Understand costs and benefits of choosing from the variety of Cloud services

Highlights: Benefits of Cloud computing • Control of your data • Data security in cloud storage and cloud applications • Data encryption • Decision points for choosing SaaS and hosted solutions • Backup options • Popular cloud applications • Explore different models of cloud computing

Designed for: CPAs and Professionals at all levels of an organization

Recommended CPE: 4
Prerequisites: None
Event ID: CLOUD
Course Level: Update
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Coaching and Counseling - Dealing Effectively with Underperformance

How many problem employees do you have on your team? If you could turn them around, what impact would that have on the team's productivity and morale? How much easier would that make your job? In this highly interactive workshop, participants will learn how to bring about positive change in employees without incurring resentment, making enemies or destroying relationships.

Objectives: Learn how to bring about positive change in employees • Determine if you are unconsciously triggering poor performance • Communicate effectively without creating resentment and mistrust

Highlights: Emotional and psychological roots to poor performance • Two key strategies necessary for securing employee buy-in for corrective action • The importance of an accountability system and three specific strategies for managing it

Designed for: Partners, Managers and Supervisors

Recommended CPE: 8
Prerequisites: None
Event ID: CCU
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Coaching Staff to Stay on the Right Track

Retaining and developing staff is critical to the long-term success of your firm. Learn how to be a better coach, mentor and lead your staff to desired professional growth.

Objectives: Upon completion of this course, participants will be able to: • Take steps to ensure you are helping staff meet their immediate professional needs, while not losing sight of their long-term growth and development

Highlights: Apply popular leadership philosophies • Discover the four primary coaching profiles and your natural leadership style • Master how to adjust your natural leadership style to best match the specific situation and person • Analyze how to improve and become more "balanced" in the roles of short-term "supervisor of tasks" and long-term "developer of people" • Identify common motivators for high performance • Learn how to become a strong and effective mentor to retain the most talented professionals • Master a simple approach to giving constructive feedback for improved performance • Discover how to help staff set and achieve professional goals

Designed for: Anyone who supervises others

Recommended CPE: 4
Prerequisites: Supervisory/management experience
Event ID: CYS
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Jennifer Louis, CPA

A Commitment to Community: Nonprofit Board Service and CPAs

With their significant financial and business expertise, CPAs often volunteer - or are asked to serve on - nonprofit boards. This interactive and dynamic seminar will review the core elements of nonprofit governance as well as challenge even the most experienced CPA with leading-edge nonprofit governance and accountability trends and strategies. It offers an excellent opportunity to fine tune your nonprofit board skills and knowledge, and develop younger CPAs with the goal of serving on a nonprofit board to further their training and leadership development and foster meaningful relationships in the community.

Objectives: Gain background knowledge in basic nonprofit governance principles and nonprofit accountability issues • Learn how to serve more effectively on nonprofit boards

Highlights: Basic board member responsibilities and legal duties • Accountability issues in non-profits • Governance as leadership • The types of questions good board members ask • How to make board meetings more meaningful and engaging • Developing a genuine "Culture of Inquiry" • Deliberating differently in the board room • The ten key ways to strengthen your non-profit board

Designed for: Mature and developing CPAs

Recommended CPE: 4
Prerequisites: None
Event ID: NPG
Course Level: Basic
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Strategic Management Leadership Development
Author/s: Michael Daigneault, Esq.

Course Listing

The Communication Challenge: Disarming Difficult People

How often do you deal with difficult clients, co-workers, staff and bosses? What impact do they have on productivity and morale?

Objectives: Learn how to effectively deal with different types of difficult people encountered during the workday • Develop greater confidence, productivity and sense of control

Highlights: The six different types of difficult people and what motives them • The most common mistake well-intentioned people make that actually worsens the situation • The four steps necessary to successfully communicate with any difficult person • How to "get in sync" with a difficult person and get along better • Specific strategies that prevent you from being manipulated by others • Special body language techniques to use when dealing with different types of difficult people

Designed for: All levels within the organization

Recommended CPE: 8
Prerequisites: None
Event ID: CC
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Ray Perry

Conflict Resolution - Diffusing Conflict without Diminishing Relationships

How much more successful would your employees be if they could do a better job managing conflict at work? • What would this mean to their level of stress and sense of control over the quality of life?

Objectives: Customize practical strategies for resolving conflict with others, in a way that strengthens rather than hurts working relationships

Highlights: A three-step process to quickly pinpoint the real issue(s) behind the conflict • Understand and manage the "escalation scale" to minimize disagreements • "Repair" relationships damaged by past conflicts • Powerful strategies for gaining control in the crucial first minutes of a crisis • Predict and avoid a problem situation before it reaches the crisis stage • Use a critical strategy to remain calm under extreme pressure • Avoid three behaviors that can kill any potential resolution • The four most important words to successfully manage conflict and the best time to use them • The behavioral approaches that have a predisposition for conflict • Ways to avoid the self-fulfilling prophecy to minimize conflict from happening in the first place • Six powerful methods for dealing with conflict that minimizes wasted time and unnecessary stress • Respond instead of react when the heat begins to rise

Designed for: All levels within an organization

Recommended CPE: 8
Prerequisites: None
Event ID: SCM
Course Level: Update
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Ray Perry

CPAs and Social Media: Passing Fad or Valuable Tool?

Join us for this enlightening session about how CPAs are using Social Media to develop business, make connections, do research and become thought leaders. Tom Hood has led the CPA profession in innovative uses of social media and will be presenting the latest tips and techniques to get you started using these exciting tools.

Objectives: Gain an understanding of social media and the opportunities it can provide to any organization • Understand how to use social media to share, discuss and manage information

Highlights: How social media tools can benefit you and your organization and how to use them • Amplify your message using social networking • Explore the pros, cons, and keys to success for Facebook, Twitter, YouTube, Linkedin, MySpace, Second Life, and Wikipedia

Designed for: CPAs desiring a better understanding of social media; anyone interested in firm / corporate communications

Recommended CPE: 2
Prerequisites: None
Event ID: CSM
Course Level: Basic
Format/s: Webcast - 2 hour
Field of Study: Social Environment of Business
BLI Curriculum: Communications Skills Leadership Development
Author/s: Tom Hood, CPA, CITP, Bill Sheridan, CAE

Creating a Respectful Workplace

new

Workplace harassment is any unwelcomed verbal, visual or physical conduct on a basis prohibited by law that creates an intimidating, offensive or hostile work environment or that interferes with work performance. This can include jokes, gestures, visual material in paper or electronic media. In 1999, the Supreme Court, impressed upon employers the need to train employees on harassment and discrimination prevention. No longer can employers simply rely on the existence of policies against harassment and discrimination to avoid punitive damages. Training on harassment and discrimination prevention is critical to protecting the organization. (Available in 3 or 6 hour format)

Objectives: Participants will learn to: • Increase sensitivity to unconscious stereotypes and the effects of prejudice • Prevent and eliminate harassment • Value the uniqueness of each individual • Create an environment in which each person feels safe and is inspired to do his/her best work

Highlights: Define workplace harassment • Understand forms of offensive behavior • Recognize actions that could be considered harassment • What to do if you feel you have been harassed • How to respond to harassment claims • Create an environment of respect and dignity for all • Develop a complaint policy and disciplinary procedures

Designed for: People who lead the company or firm or people who manage staff with client/customer contact

Recommended CPE: 6
Prerequisites: None
Event ID: CRW
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Sheila Birnbach

Creating Creativity: Outside - Outside the Box

It's right there on the tip of your tongue, just beyond your reach or around the next corner. It's the idea that will change your life, guarantee career success, and make everybody say "Why didn't I think of that?" You only have to be a little creative. Some people are naturally creative. For the rest of us, there is this course. Its built upon the tricks of the trade that famous (and not-so-famous) thinkers have used to ignite the creative spark. This is a highly interactive course with many creative exercises.

Objectives: Recognize how to be more creative about who you are, about how you think and how you work within the dynamics of a group • Understand how the process works from the "nside out" and focus on creative thinking skills that can be utilized in your personal and professional life

Highlights: Creativity: what is it - how do you know it when you see it - when and how do you use it - Is it a puzzle or a mystery • Your creative self: who are you and what do you want • Creativity begins with you, your mission and your motivation • Silencing the creativity-killing critical advisor • Linear thinking • Tricks of the trade: mind mapping, force-field analysis, matrices, forced connections, and more • Intuitive thinking: From incubation to imagery, from Dali to Da Vinci • Harnessing the wisdom of the crowd, and still avoid group thinking

Designed for: Leaders and others who want to use creativity to gain a competitive edge

Recommended CPE: 4
Prerequisites: None
Event ID: CREATE
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Strategic Management
Author/s: Greg Conderacci

Creative Problem Solving

Creativity and innovation are not the sole responsibility of "the oddballs down the hall." Individuals who want to succeed, contribute to their organization's (and their own) success and stay ahead of the forces of change need to be creative and know how to introduce potentially disruptive ideas into the organization, in a constructive manner.

Objectives: Learn approaches to creative idea generation, problem solving and conflict management that can help individuals and organizations become more successful

Highlights: Define the impact of a conflict-averse culture on organization and personal growth and success • Develop idea generating processes • Demonstrate a problem solving process that allows creative ideas to develop • Illustrate an approach to interpersonal effectiveness that permits conflicting ideas to be shared respectfully • Learn creativity beyond brainstorming • Learn problem solving and conflict management and their impact on organization culture • Add creative environment thinking to office culture and direction • Let go of old assumptions without eliminating valuable traditions

Designed for: Professionals who work in complex environments and recognize that creative thinking and constructive conflict can make an organization more fun, productive and effective

Recommended CPE: 8
Prerequisites: None
Event ID: CPS
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Course Listing

Critical Performance Measures - Useful Tools for Gauging Success (Frank Ryan)

Focusing time and energy for corporate leaders and CPA firms is essential in today's business climate. As organizations go lean in processes and people, it is critical to have the tools you need to meet the needs of your customers and to allow you to manage the performance of your company. Using a case study approach, this course will examine those performance measures and other critical elements of success for today's busy financial executive and CPA including growth models, product concept, target costing, operational planning and strategic planning. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Understand financial planning and forecasting in detail

Highlights: Product concept • Mission, vision and strategic performance measures • Cost of capital consideration • Target costing • External funds needed model • Daily flash reporting

Designed for: Corporate executives both financial and non-financial

Recommended CPE: 4
Prerequisites: Financial management experience
Event ID: CPMUT
Course Level: Intermediate
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Performance Management
Author/s: Frank Ryan, CPA, MBA

Critical Performance Measures: Useful Tools for Gauging Success

Successful organizations know how to effectively channel energies, abilities and knowledge of their people toward achieving short- and long-term strategic goals. Financial professionals have a special obligation to make decisions that are in the best interest of an organization. Focusing on critical performance measures might change the way you measure and manage your company.

Objectives: Use key performance measures to improve accountability • Explain The Balanced Scorecard technique of setting performance targets to achieve long-term strategic goals • Describe common performance metrics and what they tell you • Analyze the importance of both lag and lead indicators, and how it applies to practical implementation of performance monitoring • Identify the metrics most critical to your financial and operational accomplishments • Strengthen the way you monitor the results of key metrics

Highlights: Key performance measures • The Balanced Scorecard • Common performance metrics • The importance of both lag and lead indicators and performance monitoring • Identify and monitor crucial metrics

Designed for: Anyone who plays a role in recommending, setting or achieving organizational performance goals

Recommended CPE: 4
Prerequisites: Management experience
Event ID: CPM
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Mgmt Advisory Services
BLI Curriculum: Performance Management
Author/s: Jennifer Louis, CPA

Critical Performance Measures: Useful Tools for Gauging Success

Successful organizations know how to effectively channel the energies, abilities and knowledge of their people toward achieving short- and long-term strategic goals. Financial professionals have a special obligation to make decisions that are in the best interest of an organization. Focusing on critical performance measures may change the way you measure and manage your company.

Objectives: Participants will be able to successfully identify, establish and monitor key financial, customer, operational and growth performance measures for a highly successful organization.

Highlights: Learn how to use key performance measures to improve accountability for an organization's success • Obtain an introduction to a balanced technique of setting performance targets to achieve long-term strategic goals • Discover common performance metrics and what they tell you about the various aspects of your organization • Strengthen the way you monitor the results of key metrics

Designed for: Anyone who plays a role in recommending, setting or achieving organizational performance goals

Recommended CPE: 2
Prerequisites: Management experience
Event ID: CPM-W
Course Level: Intermediate
Format/s: Webcast - 2 hour
Field of Study: Mgmt Advisory Services
BLI Curriculum: Performance Management
Author/s: Jennifer Louis, CPA

The CRM Advantage – From Vendor to Adviser in 90 Days

If you could deepen and strengthen client relationships, what would that mean to your success? How would that impact your team's success? And what financial impact would it have on the firm?

Objectives: Develop strategies for more powerful client relationships resulting in significantly higher satisfaction for clients and greater financial success for the firm

Highlights: Develop a customer relationship management strategy that maximizes client service and strengthens profitability • Customize a consultative process to meet client needs and exceed expectations • Develop problem-solving strategies to successfully deal with problems and issues from the client's perspective • Customize practical strategies that will strengthen and deepen client relationships while building strong loyalty to your firm

Designed for: Managers and partners

Recommended CPE: 8
Prerequisites: Management experience
Event ID: CRM
Course Level: Intermediate
Format/s: Group Live
Field of Study: Marketing
BLI Curriculum: Business Management
Author/s: Ray Perry

Crystal Reports XI - Fundamentals of Report Design I (Introduction)

This course, designed for beginners, introduces students to the basics of report design and creation. Plan and create reports, organize data, format reports and learn other fundamental elements of report design.

Objectives: Learn how to design and create reports • Review fundamental elements of report design

Highlights: Plan and create a report • Select records for a report • Organize data • Format a report • Apply section formatting • Create basic formulas • Apply conditional reporting • Represent data visually • Distribute reports

Designed for: Beginning report designers

Recommended CPE: 8
Prerequisites: Basic Computer Skills; Basic Windows Skills; Experience using a web browser
Event ID: CRYSTAL
Course Level: Basic
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: David Schmidtknecht

Crystal Reports XI - Fundamentals of Report Design II (Intermediate)

This course is for experienced report designers who want to learn the basics of report design and creation. Create complex formulas and templates, generate specialized reports and learn more advanced fundamentals of report design.

Objectives: Learn more advanced fundamentals of report design • Gain knowledge of additional reporting topics and techniques

Highlights: Using the enterprise repository • Create complex formulas • Formula templates • Create parameter and prompts • Create cross tab reports • Working with report sections • Create form letters • Using conditional formatting • Create specialized reports • Create report alerts

Designed for: Experienced report designers

Recommended CPE: 8
Prerequisites: Fundamentals of Report Design I
Event ID: CRYSTALI
Course Level: Intermediate
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: David Schmidtknecht

Crystal Reports XI - Fundamentals of Report Design III (Advanced)

This is an advanced course for students who want to explore more advanced reporting topics and expand their expertise in this area. The course builds on the knowledge and skills acquired from previous courses, Crystal Reports XI - Fundamentals of Report Design I and II.

Objectives: Learn additional advanced reporting topics • Gain expertise on advanced reporting topics

Highlights: Multi-pass report processing • Create subreports • Create advanced parameters

Designed for: Experienced report designers

Recommended CPE: 8
Prerequisites: Fundamentals of Report Design I & II
Event ID: CRYSTALA
Course Level: Advanced
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: David Schmidtknecht

Current Economic Issues and Their Impact on the Financial Professional new

In this course, the financial services bill (Dodd-Frank Bill), health care reform, shortfalls in Social Security, unfunded liabilities, and deficit spending will all be explored relative to their impact on the CFO / Controller and your organization. Useful tools for the CFO / Controller to deal with these macro-economic forces will be explored. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Analyze the impact on an organization of current economic trends to include employment, deficits, unfunded liabilities, municipal debt, interest rates, and an aging U. S. population • Review the impact of the Health Reform legislation • Determine the safety and soundness of the financial plans for your organization in an uncertain economic climate • Manage cash in a rapidly changing economic landscape • Evaluate the impact of federal, state and municipal deficits and unfunded mandates as it relates to tax planning • Review programs with Social Security funding as it relates to providing retirement plans for your employees • Influencing growth through acquisition of distressed organizations

Highlights: Regulatory, fiscal and monetary policies impact on the organization • Health insurance reform and the impact on the employer • The impact on an organization of an aging U. S. population and determining succession planning • Factors influencing the debt and equity mix to manage growth and risk

Designed for: Controllers, CFOs, COO's and CEO's

Recommended CPE: 8
Prerequisites: Financial executive experience
Event ID: CEICFO
Course Level: Intermediate
Format/s: Group Live
Field of Study: Economics
BLI Curriculum: Strategic Management Business Management
Author/s: Frank Ryan, CPA, MBA

The Customer Map: A Critical Tool for Developing Business Acumen

Going against the grain of popular wisdom, most customers / business partners do not know what they want, much less how your organization can meet their needs. The Customer Map is a structured process for getting below the surface of what your customers ask you for to uncover what they need the most. The Map enables your organization to set priorities and take action from improving processes, to creating new services and products, to anticipating customer needs.This course will review the Customer Map process and show you how to utilize it to develop successful business partner relationships.

Objectives: Understand the Customer Map process and how it contributes to building business acumen • Be able to analyze customer requirements and determine action priorities by utilizing a Map case study • Know how to leverage the Map process for developing successful business partner relationships

Highlights: How to apply the Map process to both internal and external customers and business partners • Effective questioning and listening techniques • The out of body experience you need to get customer feedback • Business process improvements that create the most value for your customers / partners • How Map data creates a call to action and grabs the attention of executive leaders

Designed for: Executive or executive-sponsored teams for strategy development purposes; finance and accounting teams with their internal customers / business partners; cross-functional teams responsible for improving service with external customers

Recommended CPE: 4
Prerequisites: Management experience
Event ID: CCFO
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Alan Patterson

Customized Annual Update for Accountants and Auditors

The definitive course to keep CPAs abreast of the fast-paced changes in accounting and auditing, this comprehensive program covers all the relevant pronouncements, exposure drafts and consensus reports recently issued in the accounting, auditing, compilation and review arenas and will be customized based on desired topics and the needs of the client.

Objectives: Identify and apply recently issued FASB statements, interpretations and technical bulletins • Learn how to assess the effect of current auditing standards and standards on accounting and review services from coverage of the latest issues at the AICPA, EITF and FASB

Highlights: Current FASB topics • New developments in auditing and compilation and review services • New SASs • PCAOB and SEC reporting requirements • Share-based payments • Attestation engagements • Assurance services • Ethics pronouncements • Customized based on desired topics and the needs of the client

Designed for: Accountants in public practice and industry who want to remain up-to-date on accounting, auditing, compilation and review pronouncements

Recommended CPE: 4
Prerequisites: None
Event ID: LGAA
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Elizabeth Gantnier, CPA

Dare to Prepare: How to Win Before You Begin

In today's fast paced electronic world, people often take a "ready - fire - aim" approach when attempting to influence, persuade or negotiate with others. Preparation has become a lost art. This course will give you a simple "Preparation Checklist" that will make you more efficient and more thorough in your preparation. Young professionals will learn effective techniques that will prevent them from ever developing bad habits, and more experienced participants will learn ways to take what they may already do intuitively to help them prepare more systematically, which will make them more efficient. If you out-prepare them, you will out-perform them.

Objectives: Be able to use the Dare to Prepare Checklist and be more prepared for any difficult situation

Highlights: 10 Point Checklist • Work through a case study • Get feedback on a real life situation you are currently facing

Designed for: Those just starting their careers, as well as more seasoned professionals

Recommended CPE: 2
Prerequisites: None
Event ID: DTP
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Ronald Shapiro

Dealing with Difficult People

Difficult people appear in all areas of life-each of us needs strategies and tactics to communicate effectively, achieve our purpose, and feel good about ourselves when dealing with them. This workshop will provide an opportunity to learn strategies and tactics that can help in many situations when difficult people are making work and communication challenging.

Objectives: Identify types of difficult people • Learn how to respond effectively to different types of difficult people • Develop the skills of integrating pauses and listening into basic personal communication strategies for managing difficult people

Highlights: 4 step strategy for managing situations with difficult people • Tactics for dealing with commonly encountered types of difficult people • Skills for self-management when communicating with difficult people

Designed for: Anyone who must communicate effectively with difficult people

Recommended CPE: 4
Prerequisites: Managing experience
Event ID: DDP
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Course Listing

Delivering Credibility on the Phone – Conveying a "Can Do!" Attitude

new

Do the people who answer your telephones sound happy to be at work? Do they convey a positive image of your organization? Or do they sound bored or tired on the telephone? Do your callers perceive them as rude or uninterested? The people who answer the telephones in your organization can be image enhancers or image detractors, depending upon their vocal quality.

Objectives: Participants will learn: • To enable those who answer the telephone to project a professional image of the organization • To provide skills to enhance the verbal and vocal message that is delivered • To enable callers to receive exceptional service every time they call

Highlights: Handling all calls with professionalism • Improve the elements of voice and vocal quality • Eliminate rude and offensive telephone practices • Convey the quality of "warmth" • Control "emotional leakage"

Designed for: People who lead the company or firm or people who manage staff with client/customer contact

Recommended CPE: 3
Prerequisites: None
Event ID: CANDO
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Sheila Birnbach

Derivatives and Hedge Accounting: The Essentials

Hedge accounting, by its very nature, is fraught with inconsistencies, which are further compounded by the complexity of the financial relationships within the scope of the hedge accounting standards under U.S. GAAP. The objective of this course is to show that there is a "method to the madness" of hedge accounting. Starting with the basics, numerous examples will rapidly become more complex; and the explanation of each solution will be couched in terms of common themes.

Objectives: Review the essentials of derivatives and hedge accounting

Highlights: Introduction to Derivatives and the Economics of Hedging Activities • Hedge Accounting Essentials • Measuring hedge effectiveness • Embedded derivatives • Termination of hedging relationship • Disclosures requirements (including SEC requirements) • Comparison of U.S. GAAP requirements to IFRS

Designed for: Financial accountants and financial managers

Recommended CPE: 6
Prerequisites: None
Event ID: HEDGE
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Thomas Selling, Ph.D., CPA

Developing a Communication Strategy

Communication is the heart of every organization. Through communication, people understand what's happening, what the priorities are and how the business is doing. Leaders use communication to connect to their followers and followers expect their leaders to communicate with them so that they know how (and where and why) to follow. Managers and supervisors communicate regularly, establishing expectations and providing feedback. Without a communication strategy, you and your organization cannot attract and retain the right people, and make the right things happen to be effective in the marketplace.

Objectives: Develop a suitable communication strategy • Create communication focusing on the right messages • Identify the criteria for effective communication • Understand the role of communication in organizational success • Develop a communication strategy/plan that actively moves the organization toward its goals

Highlights: Understand how communication enables people to work effectively on the right assignments, supporting leaders and producing results • Examine how leaders at each level of the organization benefit from involving people in their thinking and planning • Discuss the essential elements of communication and how to make it work

Designed for: Leaders who want their organizations to move faster and more effectively, with clearer alignment around goals and higher commitment to achieving them

Recommended CPE: 8
Prerequisites: Management/supervisory skills
Event ID: DCS
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Developing and Retaining Talent — an Organization Imperative

New economy or old economy, in today's economy one thing is certain – attracting and retaining talent is the key to organization success. Talent is tough to locate, attract, develop and retain, but only with talent can your organization thrive. The traditional approaches of paying dues and apprenticeships no longer meet the needs of young and mid-career professionals. It is difficult to motivate these young professionals because what they seek is often not what their predecessors sought. Yet, the future depends on finding a way to bring in and nurture the talent of the professionals who will deliver success in the short term and take over their organizations long term.

Objectives: Develop a leadership approach that meets the needs of today's professionals • Design collaborative, exciting, developmental work assignments • Build affirmation and professional growth into the workday

Highlights: Develop a profile of barriers to talent retention and solutions that will minimize those barriers • Understand the following concepts: generational differences and their impact on attracting and retaining talent; the attract-retain cycle; reciprocal mentoring and decision-learning teams; the metrics of success for talent retention

Designed for: Those in organizations who have the responsibility and/or need to attract and retain the talent that will deliver current and future success

Recommended CPE: 8
Prerequisites: Management experience/HR
Event ID: RTMC
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Economic Update: After the Recession, and Maybe Before

This presentation will focus upon the emerging economic recovery, its characteristics and its likely sustainability. Particular attention shall be paid to the messages being sent by financial markets, the performance of the labor market, regional economic performance, and factors that have the potential to shift the economy's present trajectory. The presentation also provides economic outlooks to support decision-makers.(This program is available in a one to 4 hour format.)

Objectives: Gain an understanding of global and U.S. economic dynamics and the causal factors behind these dynamics.

Highlights: Global Economy • U.S. Economy • Mid-Atlantic Economy • Other regional economies • Labor markets • Financial markets • Consumer behavior / spending • Energy prices • Construction volume • Volume of lending

Designed for: Key organizational decision-makers

Recommended CPE: 4
Prerequisites: There are no prerequisites for this course. An overarching objective is to present information in a manner that is accessible to people of diverse backgrounds.
Event ID: EU
Course Level: Basic
Format/s: Group Live
Field of Study: Economics
BLI Curriculum: Strategic Management
Author/s: Anirban Basu, J.D.

Economic Value Added - Maximizing Shareholder Value (Frank Ryan)

In the turbulence of the financial markets of 2008, the valuation of a companys earnings and business model becomes increasingly important. Financial market panics undermine the very fundamental analysis that every corporate executive, auditor, consultant and financial executive should be employing as they review their strategic direction. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Understand the concepts of economic value added and the cost of capital • Review fundamental approaches to valuation using economic and market value approaches

Highlights: Understanding financial planning and forecasting • Economic value added model • Cost of capital consideration • Market value added model • Governance models

Designed for: Corporate executives both financial and non-financial

Recommended CPE: 4
Prerequisites: Management experience
Event ID: EVAMS
Course Level: Intermediate
Format/s: Group Live
Field of Study: Economics
BLI Curriculum: Business Management
Author/s: Frank Ryan, CPA, MBA

The Economics of Health Reform: Implications for Industry & Society

Increasingly, laws are passed with a focus on short-term merits or benefits to a few constituencies and groups. This presentation will analyze both the short- and long-term implications, and the possibly unintended consequences of the recently passed U.S. HL reform legislation, including how it might affect consumers, employers and U.S. industry. In this way, the presentation will compare stated policy goals with anticipated outcomes.This program is customizable depending on the needs of the client.

Objectives: After attending the presentation, participants will - • Gain an understanding of the current U.S. HL system and its recent performance relative to fiscal, clinical and policy outcomes • Gain an understanding of the major structural tenets of the health reform legislation • Explore implications on individuals, businesses, industry and the U.S. economy as a whole • Be better able to analyze the impact of reform personally, on their business, and on the state of the domestic economy.

Highlights: Analytical • Well-researched • Close to policy makers • Most current thinking and analysis • Entertaining • Thought-provoking • Challenging

Designed for: Anyone who wants to learn more about the new HL reform legislation

Recommended CPE: 2
Prerequisites: None
Event ID: EHRIIS
Course Level: Overview
Format/s: Webcast - 2 hour
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: R. Donald McDaniel

Effective and Efficient Risk-Based Financial Statement Audits in Compliance with Yellow Book

Auditing standards have been strengthened to improve the quality and effectiveness of financial statement audits. CPA firms need to act now to train audit professionals on how to effectively and efficiently perform audits that comply with relevant standards.

Objectives: Explain how to use an enhanced understanding of the client entity and its operating environment, including internal control, to perform a higher quality engagement that complies with standards related to risk assessment and Yellow Book

Highlights: Understanding how recent auditing standards enhance the traditional audit risk model and historical audit practice • Improving judgments about materiality and evaluating audit evidence • Learning how to apply a better understanding of the client's business and industry, including internal control, to enhance risk assessment and tailor the audit approach.• Suggestions for documenting an enhanced understanding of the client, including assessing the auditee's control environment and risk management for financial reporting.• Applying information gained about internal controls to alter control reliance strategies.• Using knowledge about the client to design more effective analytical procedures.• Understand the most recent requirements and implementation guidelines related to Yellow Book and A-133 compliance audits

Designed for: Any public accountant interested in learning tips and techniques to effectively and efficiently integrate risk-based audit concepts into the financial statement audit

Recommended CPE: 8
Prerequisites: Experience with financial statement audits
Event ID: RAS
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Auditing (Gvmt)
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Effective Communications

CPAs are counted on to deliver communications that are outside of pronouncements. In order to be an effective member of a team, you must be able to communicate in your emails and when speaking in public. In addition, effective communicators must be trained to be good listeners. This course will cover the skills a CPA needs to be effective in communications for speaking, writing, and listening to the needs of the client and the dynamic market forces that we currently are facing. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Obtain the skills a CPA needs to be effective in communicating for speaking, writing, and listening to the needs of the client and the current market forces

Highlights: Writing for the CPA • Effective listening skills • Managing and resolving communications conflict • Effective speaking for the CPA • Improving that first impression

Designed for: Any CPA involved in dealing with the public or with peers or supervisors

Recommended CPE: 4
Prerequisites: None
Event ID: ECFR
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Frank Ryan, CPA, MBA

Effective Meetings and Presentations - How to Make an Impression that Makes a Difference

Do you spend time leading meetings and giving presentations? Could you use some help strengthening both of these important performance areas? *Please note: Final approval for CPE credit for this course is dependent upon your state board of public accountancy.*

Objectives: Gain more results from meetings with clients, co-workers and staff • Strengthen skills in delivering presentations of all kinds

Highlights: Learn how to prepare and deliver a traditional presentation to any size group (staff meeting, client meeting, etc.) • Learn specific strategies for effective meeting preparation and management • Customize an effective approach to use whenever asked to make an impromptu presentation • Learn specific strategies for handling difficult people and challenging questions

Designed for: Employees within the organization involved in leading meetings and delivering informal and formal presentations

Recommended CPE: 8
Prerequisites: Management experience
Event ID: EMP
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Ray Perry

Elevating Team Performance

Organizations can achieve a peak level of excellence only when the parts of their sum are performing. Today's business environment is too unforgiving to allow for underperforming or non-productive efforts. This program gives leaders practical tools and techniques to motivate their team and challenge them to perform at a higher level. It will help to define roles and responsibilities, and assists management in developing specific value measures to enhance performance for any function or team.

Objectives: Determine team roles and responsibilities • Be able to asses team strengths and barriers to future success • Develop a plan to improve team performance

Highlights: Aligning team roles and responsibilities to critical business processes • Implementing ground rules and setting team expectations • Developing an effective communication and feedback structure • Handling performance issues • Managing remote and virtual teams

Designed for: Executive teams; executives and managers; department heads; managers of remote-site and virtual teams (NOTE: Customization for intact teams available upon request)

Recommended CPE: 8
Prerequisites: None
Event ID: ETP
Course Level: Overview
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development Performance Management
Author/s: Alan Patterson

Embrace Your Inner Superhero

What if we DID do it all? What if there wasn't one single thing that we would give up? What did Clark know that we don't? This course will introduce you to a conceptual model for thinking about how to lead a very busy, and fulfilling life, without completely losing your mind. You will be introduced to some practical tools to apply to your life, and there will be ample discussion time to take theory to practice. While this course is especially relevant to female leaders, it does not exclude the male perspective.

Objectives: Learn how to lead a super busy life from a centered place.

Highlights: A strength-based approach to personal leadership • Understanding the 5 components of the superhero system (meaning, challenge framing, managing personal energy, engaging others, contributing to the growth of others) • Opportunity for applying the concepts and discussion

Designed for: The ideal audience is women in leadership roles who want to find a conceptual framework that helps them to balance their lives and evaluate what they take on; people who have significant accountability and authority within their lives, both professionally

Recommended CPE: 2
Prerequisites: None
Event ID: EYIS
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Gretchen Pisano

Course Listing

Emerging CFOs and Financial Executives: One on One Assessment and Coaching

Today's successful financial leaders have unique skills characterized by their agility, resilience and experience. The global economy, competitive environment, scarcity of resources, issues of profitability and the need to serve multiple masters create difficult expectations.In most organizations there are several individuals who are outstanding leaders, some of whom will rise to the level of CFO or Partner. However, it is only a small percentage that has the proverbial right stuff to take the financial executive position. An organization's ability to recognize skill and nurture talent is imperative. Identifying emerging CFOs and Partners and grooming them for future responsibilities is critical to the on-going success of the organization. This program is an in-depth assessment and professional development and one-on-one coaching process with Dr. Alan M. Patterson. This program is highly customized.

Objectives: Be able to assess an individuals performance and potential through an in-depth 360 feedback process • Understand how to create a performance development plan and experience map for moving forward • Know how to implement an on-going coaching process

Highlights: Use of comprehensive assessment tools and feedback • A specific professional development plan • Regularly scheduled coaching sessions

Designed for: CFOs, partners, candidates in line for succession; high potential employees

Recommended CPE: 8
Prerequisites: Five to eight years of professional experience with at least one year in management
Event ID: EMERGE
Course Level: Advanced
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development Performance Management
Author/s: Alan Patterson

Emotional Intelligence and Personal Leadership

It is not enough to be smart, experienced or focused. Only when you understand who you are, how you impact others, and how best to manage yourself and your communication, will you be able to use your smarts and become effective. Emotional intelligence is the missing element in many potentially successful professionals' careers. This workshop introduces the concepts of emotional intelligence and allows participants the opportunity to explore their role in personal and organizational effectiveness.

Objectives: Learn the concepts of emotional intelligence • Explore your role in personal and organizational effectiveness

Highlights: Tie emotional intelligence to daily demands • Recognize the key factors inhibiting the development of emotional intelligence and how to get past them • Define the elements of emotional intelligence • Understand the impact of emotional intelligence on personal performance • Use knowledge of emotional intelligence to coach and mentor • Use emotional intelligence to increase personal and organizational effectiveness

Designed for: Professionals who recognize the next and crucial phase of success depends on personal growth

Recommended CPE: 8
Prerequisites: Management experience
Event ID: EI
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Employee Benefit Plan Auditing

Employee benefit plans involve complex and unique accounting, auditing, regulatory and financial reporting issues. Recent inspections have noted significant deficiencies in many employee benefit plan audits. This course will focus on quality auditing of common employee benefit plans.

Objectives: Upon completion of this course, participants will be able to: Recognize common mistakes in auditing and financial reporting of employee benefit plan audits • Understand the structure of popular employee benefit plans, including defined contribution, defined benefit and health and welfare plans

Highlights: Implementing the risk assessment standards effectively and efficiently • Auditing significant audit risk areas for various types of plan audits, including investments, contributions received and receivable, benefit payments, participant data, allocations and plan obligations • Fraud risk factors for consideration • Fair value measurement audit and accounting issues • SAS 70 special considerations • Regulatory reporting requirements, including ERISA • Communicating internal control matters noted during the audit • Plan tax status considerations

Designed for: Anyone who performs or reviews employee benefit plan audit engagements

Recommended CPE: 8
Prerequisites: None
Event ID: EBPA
Course Level: Basic
Format/s: Group Live
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Enterprise Risk Management - Accountability Framework

External factors have fueled a heightened interest by organizations in ERM. Industry and government regulatory bodies, as well as investors, have begun to scrutinize companies' risk-management policies and procedures. By identifying and proactively addressing risks and opportunities, business enterprises protect and create value for their stakeholders, including owners, employees, customers, regulators, and society overall. This course will explore strategic, operational, financial and legal risks, not just from a perspective of "what might go wrong" - but from the view of "what must go right."

Objectives: Develop an understanding of enterprise risk and the critical success factors to thoughtfully address such risks

Highlights: ERM overview - review the business case for enterprise risk management • Learn how to establish the corporate risk appetite keeping in mind that all other decisions flow from this • Identify high level risks in each major risk area and categorize risk mitigation activities currently in place • Summarize management's assessment of effectiveness and identify areas for enhanced procedures • Learn how to quantify the costs of undesired outcomes from identified risks and to assess the likelihood of occurrence • Determine how to best finance the company's risk mitigation activities based on the corporate risk appetite

Designed for: CPAs and finance professionals who want to expand their knowledge of how business management, economic cycles, and client culture could impact risk and what can be done to mitigate such risk

Recommended CPE: 8
Prerequisites: Risk Management experience
Event ID: ERMAF
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Robert Tarola, CPA

Essential Skills for CPA Firm Managers new

This course focuses on helping audit professionals become more firm-focused, beyond improving the quality and efficiency of specific engagements. This course is appropriate for any experienced professionals with firm-wide leadership potential or responsibilities, including professionals from audit, tax and other service lines.

Objectives: Upon completion of this course, participants will be able to explain the critical skills necessary for CPA Firm leaders to have in order to ensure long-term firm–wide profitability.

Highlights: The balanced leader-manager: Clarifying the difference between leading and managing your firm's personnel, clarifying the benefits and potential issues with primary leadership styles, identifying necessary competencies for both leaders and managers in CPA firms, using 360 degree feedback for self-improvement, creating action steps for critical professional growth • Making rain – Strategies for client service, selling and negotiating: Mastering tips for building client loyalty, understanding client perceptions and buying motives, analyzing how proven selling techniques apply to the professional services firm, leaning how to cross-sell services, practicing effective negotiating techniques, identifying ways to communicate your firm's marketing advantage, and discovering how to build a network of profitable key prospects • Critical performance measures

Designed for: Professionals with greater than 4 years audit, tax or other CPA Firm experience

Recommended CPE: 8
Prerequisites: None
Event ID: ESTM
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development Performance Management
Author/s: Jennifer Louis, CPA

The Essentials of SEC Financial Reporting

This two-day course provides in-depth fundamentals of SEC reporting and the latest information on recent developments at the SEC. Whether you have just become involved in the SEC reporting process, or have been working in the field for years, this course will give you a solid grounding in the principle rules and regulations and their compliance triggers. You will also be brought up-to-date on all the recent developments occurring in this unprecedented period of change. (Available in 4-10 hr format)

Objectives: Understand the principle rules and regulations and their compliance triggers • Review recent developments and get up-to-date

Highlights: Legislative history and overview of the key securities laws • Organization structure of the SEC • Oversight of the FASB and PCAOB • Securities offerings and continuous reporting under the Integrated Disclosure System • Regulations S-X and S-K: the key financial reporting regulations common to '33 and '34 Act filings • The proxy rules and other selected rules and regulations • Details of filing '34 Act form: 10-K, 10-Q and 8-K • Insider trading, and compliance with Section 16 and selective disclosure rules • The SEC's review and comment process, and effectively interacting with the SEC staff • Financial reporting and SEC enforcement • Overview and applying the rules of MD&A • Recent SEC reporting developments

Designed for: Auditors, accountants, financial managers or attorneys of public companies, or companies that may decide to go public in the future

Recommended CPE: 4
Prerequisites: None
Event ID: ESEC
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Thomas Selling, Ph.D., CPA

Course Listing

E-Talk: Tips for Using Email Efficiently & Effectively

Many of your clients and colleagues meet you for the first time via email. They form perceptions about you (and your company / firm) based on your ability to type - or, rather, by your ability to communicate via email. Think about it: People develop opinions about you (and your firms services or products) based solely on your email messages. This interactive session will teach you how to be more effective and save time using email, while establishing credibility with clients and colleagues. It is loaded with practical examples and relevant activities. You'll leave the program knowing how to use email communication more efficiently and effectively.

Objectives: Determine which method of communication is best for different situations • Improve the effectiveness of your messages • Understand the number one most successful technique for getting your email message opened • Learn how to get your messages read, answered, and acted upon

Highlights: When to paste and when to attach documents • How to use, or not to use, special tools (i.e., receipt verification, acknowledgment, enclosures) • How the appearance of your email affects your professional image • Maintaining cohesion and clarity when responding to messages • Improving efficiency by understanding the mechanics of email

Designed for: All

Recommended CPE: 4
Prerequisites: People who are currently using email
Event ID: ETALK
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

Ethics

Review recent topics concerning ethics (2 or 4 CPE hours)

Objectives: Be aware of ethical situations in your practice

Highlights: New issuances concerning ethics • Ethical cases brought up before the AICPA • Mini-cases about various ethical issues, including independence

Designed for: Any level professional staff

Recommended CPE: 4
Prerequisites: Basic knowledge of auditing and accounting, through education or experience
Event ID: ETH
Course Level: Basic
Format/s: Group Live
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Gary Bulmash, CPA

Ethics and the Attest Function: A Practical Update for CPAs in Public Practice new

Receive a fast-paced overview of ethical standards promulgated by the AICPA and State Society and State Board authorities as they apply to small-to-medium-sized CPE firms. We will use case studies to examine the connections between ethical principles, formal rules and the profession's public responsibility. In addition, learn how to apply the independence rules of Interpretation 101-3 when providing both attest and non-attest (management advisory) services for closely held clients. Receive up-to-the minute coverage of evolving issues such as tax advisory services and recent revisions to the Ethics Code. (Content can be customized to client needs)

Objectives: To provide CPAs in public practice with an update of their ethical responsibilities under AICPA and state-based regulations. Emphasis will be on the practitioners who provide compilations, reviews or audits, as well as a range of other services for closely held businesses. Cases and examples will be used extensively.

Highlights: Ethics and attest function: The players • Ethical principles and fraudulent financial reporting • AICPA Ethics Code • A practical guide to independence and advisory services • Independence and ethics alert

Designed for: Accountants in public practice who need an overview of the ethical requirements that govern the issuance of financial statements

Recommended CPE: 4
Prerequisites: None
Event ID: PEU
Course Level: Update
Format/s: Group Live
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Ray Thompson, CMA, CFM, CBA

Ethics in Accounting

This course will explore the history of, and typical factors around, ethical lapses in accounting.

Objectives: Learn how to better address the often difficult choices when confronted with an ethical accounting issue

Highlights: Various public events that have caused questions of ethics under the U.S. accountability and disclosure system • What drives individuals to consider or acquiesce to compromising accounting • What in the reporting system or personal make-up of an individual allows intentional misstatement of company information, and does company culture foster such behavior • What changes to the reporting system are more likely to deter poor ethical choices • How to address or respond to ethical challenges within an organization

Designed for: CPAs and other finance professionals who want to explore ethical issues that could impair business accountability

Recommended CPE: 4
Prerequisites: None
Event ID: EIA
Course Level: Update
Format/s: Group Live
Field of Study: Ethics - Behavioral
BLI Curriculum: Strategic Management
Author/s: Robert Tarola, CPA

Ethics Principles and Applications

While ethics training is required by many states, the true value of our CPA license is in understanding how critically important ethical behavior is to one another, our customers and to the public. Ethical behavior is what we are all about. This course will explore the basic tenets of ethical behavior and use various case studies to explore what has gone wrong in the past. Using real disciplinary cases, we will examine what went wrong with the behavior of others in our profession. We will review a standard of conduct and then show you how to apply those standards to the real world. A case study approach is used.

Objectives: Be able to identify the four tenants of ethics for a CPA • Know how to apply the concepts of ethical behavior required of CPAs • Identify character traits important to the profession

Highlights: The four tenants of ethics for a CPA • Examining the impact of ethics on our profession • Character traits important to the profession • Circumstances where your conduct can be called into question

Designed for: CPAs in public and private practice

Recommended CPE: 4
Prerequisites: None
Event ID: EPA
Course Level: Update
Format/s: Group Live, Webcast - 4 hour
Field of Study: Ethics - Behavioral
BLI Curriculum: Strategic Management
Author/s: Frank Ryan, CPA, MBA

Ethics, Leadership and the Role of the CPA

Designed to provide all CPAs with both a conceptual and practical approach to professional ethics in today's volatile and high-profile marketplace, this course will provide the skills needed to guide your actions when faced with difficult ethical decisions. A case study approach is used.

Objectives: Comply with State Board of Accountancy requirements for topics dealing directly with professional ethics and conduct • Address difficult ethical dilemmas you might face in your professional career • Help your decision-making process

Highlights: State Board of Accountancy latest pronouncements • Developing a culture of high ethical standards in your firm or company • Case studies and discussion • Q&A exchange • Current events in professional ethics

Designed for: All licensed CPAs in practice, industry, education and government

Recommended CPE: 4
Prerequisites: None
Event ID: EAA1
Course Level: Update
Format/s: Group Live, Webcast - 4 hour
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Frank Ryan, CPA, MBA

Ethics, Leadership and the Role of the Financial Professional

Designed to provide the financial professional and corporte leader with both a conceptual and practical approach to professional ethics in today's volatile and high-profile marketplace, this course will provide the skills needed to guide your actions when faced with difficult ethical decisions. A case study approach is used.

Objectives: Comply with State Board of Accountancy requirements for topics dealing directly with professional ethics and conduct • Address difficult ethical dilemmas you might face in your professional career • Help your decision-making process

Highlights: State Board of Accountancy latest pronouncements • Developing a culture of high ethical standards in your firm or company • Case studies and discussion • Q&A exchange • Current events in professional ethics

Designed for: Financial executives

Recommended CPE: 4
Prerequisites: None
Event ID: EAA2
Course Level: Update
Format/s: Group Live
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Frank Ryan, CPA, MBA

Everyday Economics

This course will explore how economics can be used to explain everyday behavior, in a myriad of real life situations. By discussing the work of the most influential and seminal minds in the economics profession, attendees will gain an appreciation for how the economist views the world and the power of their theories to explain why people behave the way they do and then be able to apply it to their approach to doing business.

Objectives: Learn why economists assume people are rational even though, at times, this assumption seems to be false • Explore how to use various economic models and theories to explain how people behave, and how they will react to various policies and incentives • Understand the principle of revealed preference, and why there is usually a gap between what people say and what they do • Gain an understanding of the critical importance of price theory, and how prices transmit information, allocate resources, and distribute income • Debate the morality and ethics of various policies and issues facing citizens today

Highlights: How parents decide to divide their wealth • Population growth: Blessing or curse • Does the government deficit and the trade deficit hurt or help the economy • Should the tax code be scrapped What would replace it • Why do laundries charge less for men's shirts than for women's • Do companies really plan obsolescence • Why are shopping carts getting bigger • Why is movie theater popcorn so expensive • Should there be a free market in human organs • Why we are getting so fat

Designed for: Anyone who wants to gain a better understanding of human behavior and explore the ideas of the worlds most innovative economists

Recommended CPE: 8
Prerequisites: None
Event ID: EECON
Course Level: Basic
Format/s: Group Live
Field of Study: Economics
BLI Curriculum: Business Management
Author/s: Ronald Baker, CPA

Everyday Ethics: Doing Well and Doing Good new

Ethical behavior of CPAs is expected each and every day—in and out of the practice of accountancy. Failure to follow ethical behavior jeopardizes your personal and professional future. What ethical obligations do you have to your customers, employer, team members, and outside stakeholders? What impact have the recent accounting scandals had upon the profession, and how can they prevent repeating those ethical lapses? This course will help you to define your obligations beyond the rules and regulations, to create a new moral code based upon the principles of individual creativity, community, realism, and the other virtues that make up the spirit of enterprise.

Objectives: Understand the CPA's professional ethical obligations and responsibilities • Learn the seven internal and external responsibilities of business • Gain an appreciation of what moral philosophers thought about enterprise and ethic • Gain insight into Adam Smith's "Invisible Hand" and how it promotes ethical behavior • Discover what it means to be a "professional" and what the requirements of a "profession" are

Highlights: Implications of the Sarbanes-Oxley Act of 2002 • Avoiding ethical lapses that can lead to malpractice • Ethical implications of tax and consulting services, tax shelters, commissions, and alternative pricing models • Issues and trends confronting the profession and the firm of the future

Designed for: Any CPA in public or private practice in search of a dynamic and thought-provoking ethics course with real-world examples of applying rules and regulations to their professional responsibilities

Recommended CPE: 4
Prerequisites: None
Event ID: EVRYDAY
Course Level: Basic
Format/s: Group Live
Field of Study: Ethics - Behavioral
BLI Curriculum: Strategic Management
Author/s: Ronald Baker, CPA

Excel (2007 & 2010) Advanced Productivity Features, Pivot Tables and Macro Recorder Tips

This fast-paced program covers: range naming, decision-making IF and LOOKUP functions, financial functions, Pivot Table reporting, controlling calculation inputs, securing files, formula auditing, external formula linking, many multiple worksheet tips and time-saving usage of the macro recorder. (Format choices: “Lecture only with live demo” or “hands-on, participants bring laptops”)

Objectives: Learn to use advanced functions for IF testing and Lookup • Understand how to use the Excel Pivot Table feature to report data summaries in seconds • Be able to incorporate a variety of multiple worksheet tips and external formulas linking • Learn how the macro recorder can save time with repetitive tasks

Highlights: Range names • New Name Manager dialog box for quick cell/range identification and formula building • Financial function capabilities • Date and text functions • Dfunctions based on criteria: DSUM, DCOUNT • Dfunctions in Pivot Table calculations • Conditional Formatting to identify data patterns in color • Use formula auditing tools • Use the watch window • Use the Data Validation feature • Link from Excel to Word • Group worksheets • Use 3-dimensional functions across sheets • Understand list design rules and the new Table feature • Use Pivot Tables • Create a calculated field • Create a Pivot Table of multiple consolidated ranges • Record macro examples • and more

Designed for: CPAs and Professionals at all levels of an organization needing to increase their knowledge of Excel functions and features at an advanced level

Recommended CPE: 8
Prerequisites: Intermediate/Advanced knowledge of Microsoft Excel
Event ID: EXCELA-L
Course Level: Advanced
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Excel (2007 & 2010) New Charts, Graphs and Diagrams Features

In this full-day hands-on course, you will learn the Excel features to present data using enhanced chart types, graphs, and diagrams. Drawing tools for adding annotation features will also be covered. (Format choices: “Lecture only with live demo” or “hands-on, participants bring laptops”)

Objectives: Learn data selecting techniques and tips to populate the graphic elements • Create varieties of charts • Add drawn objects including text boxes and callout shapes • Add multiple axes to present comparisons of data in bar charts • Add your customized charts to the chart templates • Use flow chart symbols and connectors to create work flow diagrams • Learn how to copy, paste and link charts • Use the diagram features included in Excel to show workflow • Explore the chart variations of Sparklines, waterfall, panel, guage, and bullet

Highlights: Master the variety of chart type choices for presenting data trends and results • Learn to enhance the appearance of charts • Learn how to add data values and explanations to charts, graphs and diagrams • Learn to customize graphs • Learn when to use the multiple axis feature for presenting various types of data • Learn when to use a primary pie chart and a secondary pie connected to the chart • Learn data selection techniques • and more

Designed for: CPAs and Professionals at all levels of an organization needing to present Excel data in a visual format and want to learn more in-depth topics with regard to the new time-saving charting and diagramming features

Recommended CPE: 8
Prerequisites: Experience using Microsoft Excel
Event ID: EXCELC-L
Course Level: Intermediate
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Excel (2007 & 2010) Pivot Tables in-depth Data Analysis Functions & Tips

Excel includes sophisticated features to present Pivot Table reports. This course covers the many Excel features to test, organize, calculate and find trends in data as well as report the results. Participants will learn many time-saving tips. (Format choices: “Lecture only with live demo” or “hands-on, participants bring laptops”)

Objectives: Use the Pivot Table features • Use the Data Validation feature • Apply new color scales and icon sets to visually spot trends in data • Sort or filter by background color of cells based on conditional formatting • Generate automatic subtotals by list category and show/hide details • Understand required design rules for an Excel list • Use Custom Views to recall AutoFilter settings • Use the Table and Subtotal Function for subtotaling visible filtered cells • Use the Advanced filter feature • Use the Excel data query feature • Use data functions, import data and text to columns features • Record simple macros for data cleanup solutions

Highlights: Master creation of complex Pivot Table reports • Understand the pivot cache and how to protect your data • Use Pivot Tables • Use multiple key Sort techniques • Use the new Table feature • Use Right, Left, Mid, Search, and Len functions to extract portions of cell contents • Learn to test data for accuracy and cleanup • Use Text to Columns • Create recorded macros for data cleanup • Learn how to run an Excel query • and more

Designed for: CPAs and Professionals at all levels of an organization needing to calculate data organized in lists or from external data sources

Recommended CPE: 8
Prerequisites: Intermediate Excel worksheet experience
Event ID: EXCELPT
Course Level: Intermediate
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Excel (2007 & 2010) Power User: Macro Programming using Visual Basic for Applications

This course will teach you how to work effectively with the Visual Basic Programming language and the Excel Visual Basic Editor to create macro code that goes beyond the capabilities of the macro recorder. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Complete the day having designed, created and tested many macro examples in Excel • Apply easy-to-follow pertinent business examples • Receive a take-home library of useful macro code and examples

Highlights: Understand Visual Basic for Applications (VBA) • Use the macro recorder • Examine module design • Edit code in the Visual Basic Editor • Assign macros to objects • Create decision-making code using the If Then Else decision structure • Create code for looping structures • Use a For Next statement • Use a Do Loop statement • Use Macro management rules • Use the Personal Macro Workbook for generic macro code • Assign sub procedures to run automatically • Create code to interact with the user and gather information from the user • Use the custom message box • Use the custom input box • Assign macros to worksheet buttons and keyboard shortcuts • Test and debug macro code • Protect and hide macro code • and more

Designed for: CPAs and Professionals at all levels of an organization needing to automate tasks in Excel beyond the capability of the macro recorder in order to save time performing repetitive report generation, data cleanup, data analysis and worksheet manipulation

Recommended CPE: 8
Prerequisites: Advanced Excel training or equivalent experience
Event ID: EXCELM-L
Course Level: Advanced
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Excel (2007 & 2010) Reporting Tools and Security Features

This fast-paced course covers advanced level topics including file collaboration features; cell, sheet, and file protection; custom views for report design / printing; scenario sets of input cells; financial and budgeting templates; and many time-saving tips. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Learn how to protect and secure your work in Excel • Add a digital signature to your files • Be able to create new quick access tools • Take away template examples for financial reporting • Learn how to share templates in your organization

Highlights: *Security Features:* Protect worksheet data by locking cells; create a protected data entry range; lock a file with new encryption features; explore security features for displaying in a web browser; send spreadsheets as PDF files; • *Collaboration Features:* Use Excel's collaboration features including file sharing and tracking changes; add comments to cells and show/hide as needed; create Excel templates to be private or shared; explore financial analysis template examples; modify the Excel auto-template; create scenarios to recall input values; create a business dashboard to track key performance indicators: Use Custom Views to recall page setup dialog box or display settings; e-mail worksheet attachments and ranges directly from Excel using Outlook; explore the speech feature enhancements • and more

Designed for: CPAs and Professionals at all levels of an organization needing to increase their knowledge of Excel features at an advanced level

Recommended CPE: 8
Prerequisites: Intermediate Excel training or equivalent experience
Event ID: EXCELA2
Course Level: Advanced
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Excel (2007 & 2010) Worksheets Refresher and New Features

This refresher course covers Excel Worksheet features in a fast-paced format to benefit beginner through intermediate level users. The many new business productivity enhancements in Excel will be covered. Participants will learn about file compatibility issues with earlier versions of Excel and how to save time with many quick tips. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Learn proven single and multiple worksheet design techniques • Use time-saving data entry techniques • Create relative and absolute formula references • Move and copy data by using shortcut menus, mouse pointer shapes and many tips • Restructure worksheets to accommodate new data, columns and rows • Use time-saving keyboard shortcuts • Change the appearance of worksheet data • Use fast formatting with the new cell styles • Use border line combinations and features • Use a variety of print options and the new page layout view • Learn multiple worksheet features • Incorporate worksheet data into bar and pie charts using the new chart features

Highlights: Use formula building techniques and learn new functions • Compare relative and absolute formula references • Learn how to save time with Excel keyboard shortcuts • Use the new Table feature for manipulating lists • Incorporate new bar graph and pie chart templates into an Excel file • Understand formatting techniques to enhance the presentation of worksheet data • and more

Designed for: CPAs and Professionals at all levels of an organization needing to save time with the day-to-day features of Excel

Recommended CPE: 8
Prerequisites: None
Event ID: EXCEL-L
Course Level: Update
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Excel + Outlook + Word + Adobe Acrobat + Windows 7-Best Practices for CPAs new

This fast-paced course is designed to focus on the most important productivity features in Outlook, Excel, Word, Adobe Acrobat and Windows 7. The content of this presentation applies to Microsoft Office versions 2007 and 2010 and Adobe Acrobat versions 9 or X. (Format: "Lecture only with live demo")

Objectives: Learn the best practices and time-saving business tips in Outlook, Excel, Word, Adobe Acrobat and Windows 7 for managing business email, appointments and contacts; auditing spreadsheets, performing data analysis; controlling document formatting; integrating Excel data into Word; creating, annotating and securing PDF files; and searching using Windows 7 features

Highlights:
Excel Features: • Use time-saving formula auditing features • Learn new functions for calculations • Track key performance indicators • Use table feature for quick data analysis • Use enhanced Pivot Table features • Pivot Tables • Learn to create dynamic Excel charts in seconds • *Outlook Features:* • Use new instant search features including archive folders • Attach files • Use the new conversation view • Share Calendars
Word Features: Use Tables and Tabs • Create PDFs from Word
Adobe Acrobat Features: • combine multiple PDFs • Manage files, folders, and libraries • Use new search features for quick access to files, email and programs • Customize the taskbar with hyperlinks and pinned files

Designed for: CPAs and Professionals at all levels of an organization using Microsoft Excel, Outlook, Word and Adobe Acrobat who desire to learn new time-saving tips

Recommended CPE: 8
Prerequisites: None
Event ID: OFADBWIN
Course Level: Update
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Excel + Word+ Adobe Acrobat Features and Productivity Tips

This fast-paced course is designed to focus on important intermediate and advanced level productivity features in Excel, Word and Adobe Acrobat v. 9. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Learn Adobe Acrobat features in combination with Word document formatting and Excel Pivot Table features

Highlights:
Excel (2007 & 2010)Features: Correct Data in text format • open csv and txt files • use Pivot Tables to analyze data by categories • Tables / Pivot Tables • apply formatting • understand the importance of the PivotCache and DrillDown • use the new Table feature to control list content • *Adobe Acrobat (9 & X) Features:* create a PDF document • navigate to specific content in a PDF document • add links and cross references • create and using stamps • create comments, lines squares and circles • add page elements • add, delete, extract pages • digital signature • use protecting features to control content • create PDF fill-in forms *Word (2007 & 2010) Features:* Change program defaults for AutoCorrect features• Use Building Blocks for page numbering and watermarks• Use Styles to generate a Table of Contents automatically • Create PDFs from Word with security settings

Designed for: CPAs and Professionals at all levels of an organization already working with Microsoft Excel, Word and Adobe Acrobat who need to focus on specific task-based features in a one day class

Recommended CPE: 8
Prerequisites: Prior use of Microsoft Excel, Adobe Acrobat and Microsoft Word
Event ID: EXWDADOB
Course Level: Intermediate
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Excellence in Management - Driving Results Without Driving Your Team Crazy

Work force values and expectations are changing, and so is the role of the supervisor. How successful are your supervisors at building employee commitment and involvement, while continuing to fulfill traditional responsibilities for scheduling work, enforcing rules and monitoring progress

Objectives: Learn to leverage key strategies for maintaining discipline and commanding respect, without creating resentment

Highlights: Praise, criticize and discipline confidently and constructively • Increase employee involvement and build employee commitment • Reduce frustrating miscommunications • Gain employee loyalty and respect • Use coaching skills to help others excel • Communicate confidently with employees, peers and managers

Designed for: Supervisors

Recommended CPE: 8
Prerequisites: Supervisory/management experience
Event ID: ES
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Exceptional Customer Service - When 'Wow' Becomes the Rule

Is providing excellent customer service an important part of your operational strategy? When it comes to handling internal and/or external customers, could your team benefit from a tuneup? Do you consult with your clients on how to integrate their entire business operations around exceeding their customer's expectations?

Objectives: Help employees deliver great customer service more often, resulting in better service to customers, operational excellence, and greater financial success to the organization • Help clients be successful by providing better business processes to focus on meeting client needs

Highlights: How to pinpoint/resolve operational bottlenecks in the existing customer service system • How to assess organizational needs • The secret behind giving great customer service when you're not in the "mood" • How to spot when you unknowingly deliver lousy customer service • The relationship between delivering great customer service and operational excellence • Key phrases that instantly turn customers off and how to avoid them • A two-step process for managing long-winded customers • Two quick ways to immediately see the situation from a customer's perspective • Two specific strategies they can use to manage their attitude • Three specific ways to build powerful customer rapport • Why attitude is everything - and how to hide a bad attitude from a customer and still deliver great service • How to avoid a listening trap that tends to cause frustrating customer service problems • The essential key to effectively dealing with angry customers • The secret behind saying "no" and still give great service

Designed for: Professionals and their staff

Recommended CPE: 8
Prerequisites: None
Event ID: DGCS
Course Level: Update
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Ray Perry

Executive Finance for Operating Leaders: Relating Numbers and Metrics to Reality

This course will show you how to create an ongoing operations finance and business reporting structure that can be understood by anyone. You will also learn to convert the numbers into at-a-glance pictures, allowing non-financial people to feel comfortable working with financial statement data. This course also teaches a proven method for hard-wiring the cash-flows to the balance sheet and how to develop and test key performance indicators. Learn how to apply Three Bottom Line Performance to real numbers using Financial Scoreboard Software. Two secret financial tools behind IBM's sensational success in the sixties and seventies are presented in this workshop by a colleague of Louis R. Mobley, the inventor. Mobley was the founding director of the IBM Executive School at Sand's Point and author of Beyond IBM: Leadership, Marketing and Finance for the Future.

Objectives: Actively involve operating people in relating to the numbers • Create direct cash statements quickly and simply • Automatically trial-balance what-ifs you can take to the bank • Strategy for identifying and testing your best performance measures • Understand why non-financial people have so much difficulty with financial information

Highlights: The financial scoreboard • How to use Financial Scoreboard Software • Why FASB 95 • Review of how the DuPont formula • The power of Key Performance Indicators (KPI)

Designed for: CPAs in industry and public practice who want to better utilize numbers as an essential resource to engage the leadership running the business

Recommended CPE: 8
Prerequisites: Financial management experience
Event ID: BGCF
Course Level: Intermediate
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Performance Management
Author/s: Jahn Ballard

Executive Presence: An Experiential Approach to Networking & Negotiation

Effective networking and negotiation skills are critical when sharing information with colleagues and other professionals, including those from other nations and cultures. This course offers planning and implementing negotiation strategies, along with numerous techniques for developing leadership skills in a competitive global environment. Text materials, video presentations, and interactive simulations of real-world situations will be incorporated into the curriculum. (Available in formats from 2 to 8 hours)

Objectives: Develop communication skills and capabilities for sharing information with colleagues and other professionals • Road maps for planning and implementing negotiation strategies

Highlights: Public speaking • In-person and online professional networking • Formal interviewing • Business negotiations • Confidence building • Ethical considerations

Designed for: Board members and corporate officers with responsibility for risk management planning, as well as mid-level managers who provide them with relevant information

Recommended CPE: 8
Prerequisites: Business planning and risk management experience
Event ID: EPRES
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Michael Kraten, PhD

Executive Summary Accounting & Auditing for Industry new

All finance and accounting professionals need to stay abreast of significant changes in various standards at least at a high level, including standards related to accounting, financial reporting, and attestation. However, not all professionals need detailed case studies and application explanation. This course provides an executive summary of the most important issues facing most companies and their accountants.

Objectives: Upon completion of this course, participants will be able to explain the basis behind major issues and trends in overview form, enabling professionals to discuss the most important aspects of relevant standards and why any planned or potential changes are coming down the pike.

Highlights: Discussion of financial reporting risks increased by the current economic environment, including increased uncertainty related to critical financial statement amounts and significant disclosures • Overview of the movement towards convergence and possible transition to IFRS • Executive summary of recent Accounting Standards Updates and FASB/IASB Joint Projects, emphasizing fair value disclosures and revenue recognition • Emphasis on various standard setter's attempts to increase management's responsibility for generating and presenting reliable financial reporting • Evaluating the importance of identifying, evaluating and remediating internal control deficiencies, including Sarbanes-Oxley Section 404 compliance

Designed for: Industry professionals and public accountants who desire to be kept abreast of changes in various accounting and audit standards at an executive summary level

Recommended CPE: 4
Prerequisites: None
Event ID: EXESUMAA
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

FASB / SAS Update (Latest Edition)

Understand how the convergence agenda involving IFRS and GAAP standards is progressing and its consequences for the world of financial reporting. Participants will receive an in-depth explanation of newly enacted convergence standards in the areas of revenue recognition, leasing, consolidation and financial instrument accounting and their likely impact on small- to medium-sized companies. Understand how the financial reporting for non-public companies will change in the near future and learn about recent developments in the compilation and review arena. Receive an update on current and proposed standards involving EITF, FASB, PCAOB, ASB and IASB. (Content can be customized to client needs.)

Objectives: To familiarize participants with those FASB statements and SAS pronouncements which impact local CPA firms. Course content will emphasize those issues most relevant to smaller firms with no SEC clients. Coverage will reflect the most recently issued authoritative literature and illustrate implementation issues and reporting alternatives.

Highlights: Progress on FASB & IASB's convergence agenda and the effect on both public and non-public companies • An early look at implementing the newly-issued final Standards on revenue recognition, consolidations and lease accounting and their likely consequences • Accounting for financial instruments • Recent developments in private company reporting • Compilation and review update • Auditing standards update

Designed for: Accountants in public practice and industry who need a comprehensive review of recent accounting and auditing pronouncements

Recommended CPE: 8
Prerequisites: None
Event ID: FSU
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Finally Fixing Performance Management Using New Tools

Simply put, most performance management systems simply do not perform very well, so it's understandable that many organizations want to improve their systems. The question is whether this can be achieved via relatively minor changes, major overhauls, or radical shifts in how managers think about managing performance. This workshop looks at all three options, and applies social networking concepts to the challenge. The objective of this workshop is simple to diagnose the flaws in attendees performance management systems, and put a plan in place for new processes that get better results.

Objectives: Be able to diagnose the flaws in performance management systems • Develop a plan for new processes that get better results

Highlights: The state of the art in performance management • The pros and cons of different approaches • Build an action plan to get better results • Technology is not a silver bullet • Considering continuous feedback instead of formal appraisals

Designed for: Departments and leadership teams that are looking for process improvements and greater productivity and efficiency levels from their employees

Recommended CPE: 4
Prerequisites: Management experience
Event ID: FIX
Course Level: Intermediate
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Performance Management
Author/s: Karl Ahlrichs, SPHR

Course Listing

The Finance & Accounting Org as Strategist and Partner to the Business Transformation

How have successful finance and accounting organizations shed the image of policeman even in the wake of added controls to become partners and strategists to the business? It is because they accept technical competence as a necessity. The added value they bring is they spend more time developing and managing critical relationships in order to learn all there is to know about the business, its customers, and the competition. This course will review how to recognize and build business acumen and develop talent to enhance key relationships.

Objectives: Be able to assess the current organization against the nine criteria needed for successful partnerships • Understand the process for developing talent and how it contributes to success in the business partner role • Know how to recognize and how to build business acumen and manage key relationships needed to achieve business partner status (a case study will be utilized).

Highlights: Business partner best practices and skill sets • How to build a base of credibility and trust • Organizational structure that showcases the partnership role • The key elements of the talent development process • How to retain your best employees

Designed for: CFO with the finance and accounting leadership team; financial executives with their team member; financial project managers and implementation teams

Recommended CPE: 4
Prerequisites: Management experience
Event ID: DICM
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Business Mgmt & Organization
BLI Curriculum: Strategic Management
Author/s: Alan Patterson

Financial and Accounting Decision Making in a Slowly Recovering Economy

The financial markets are in turmoil. Those that plan for the impact of the financial market instability will survive intact and ready for the next market upturn. The skills needed to meet these daunting times are seldom taught but are so critical to survival. The methodology to survive and even thrive in these times will be the subject of this course. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: The course will prepare the participant with a specific methodology and planning tool to deal with the financial market instability and tumultuous times that we find our economy in today.

Highlights: The course will concentrate on the key performance indicators and the methodology to assist in developing a course of action to survive and even thrive in these unusual times. Partticipants will be able to: • Determine whether or not the firm is in danger of bankruptcy. • Determine critical vulnerabilities with the firm's suppliers, banks, investors, employees, and customers • Review the external funds needed model for understanding future funding needs • Review and understand the financial capacity of the firm as a critical means of determining future vulnerabilities • Determine strategies to prevent the company's strategic plan from being compromised by short term funding problems • Identify critical success factors for survival for the company and means of reducing those risks

Designed for: Controllers, CFOs, COO's and CEO's as well as partners of CPA firms and law firms

Recommended CPE: 8
Prerequisites: Experience in business management
Event ID: STR
Course Level: Advanced
Format/s: Group Live, Webcast - 2 hour
Field of Study: Economics
BLI Curriculum: Business Management
Author/s: Frank Ryan, CPA, MBA

Financial Statements Analysis new

The financial statements contain a wealth of information that can explain historical results and predict future performance. But how do you draw that information out of the statements? Learn to be both a financial detective and a fortune teller by applying analysis techniques to the income statement, balance sheet, and statement of cash flows.

Objectives: At the end of the course students will be able to analyze the financial performance of an organization and identify trends using horizontal, vertical, and ratio analysis techniques.

Highlights: Common-size statements • Ratio analysis • Identifying trends • Analysis techniques • Interpreting data

Designed for: Finance professionals, business managers, anyone familiar with financial statements

Recommended CPE: 8
Prerequisites: Basic understanding of the financial statements
Event ID: FSA
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Financial Warfare new

The course provides guidance to the financial executive in dealing with the financial and accounting issues of these volatile financial markets that the global economy is currently experiencing. Understanding the impact of market volatility and enterprise risk on your banking relationships, supplier viability, and critical elements of survival for your business will be discussed. A daily flash report of critical survival metrics will be explored in depth. Activity based costing issues relating to cost drivers and cost controls for the firm will be explained as part of a financial warfare defense. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Identify the critical success factors for your firm and your industry • Evaluate competitor critical success factors and actions that need to be taken to protect your firm from a competitor's actions • Evaluate and identify vulnerabilities in your supplier base and your channel of distribution • Identify the cost drivers of your business model and the activity based costing implications of those cost drivers • Develop a process approach to monitoring market vulnerabilities for your firm to include fair value standards and commodity pricing and availability • Develop a daily flash report of internal reporting to monitor critical enterprise risks

Highlights: Understanding financial warfare to include: • Critical Success Factors and Enterprise Risk • Competitor Vulnerabilities • Impact of financial warfare on Internal Control Systems • Operational metrics relating to enterprise risk and financial warfare

Designed for: Controllers, CFOs, COOs and CEOs

Recommended CPE: 8
Prerequisites: None
Event ID: FINWAR
Course Level: Basic
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management Strategic Management
Author/s: Frank Ryan, CPA, MBA

Find a Need and Fill It: Your Key to Business Development

It's the oldest saw in your business toolbox — find a need and fill it. Yet the fine art of uncovering needs is a powerful tool to help you take your business to the next level. This course helps you reframe your sales and marketing efforts from a traditional solutions-based platform to a more effective needs-based platform. (This course is also available in a 2-hour format.)

Objectives: Dramatically increase the perceived value of what you offer clients • Offer more services than you would have expected • Build a larger client base than you would have expected • Sell in a kinder, gentler, more professional way

Highlights: What is the real need • Why discovering needs is more effective (and profitable) than delivering services • How to improve your questioning and listening skills to uncover needs • Improving your closing skills through needs development

Designed for: Professionals who promote services, products, services or ideas, or want to grow their business

Recommended CPE: 8
Prerequisites: None
Event ID: FINDND
Course Level: Overview
Format/s: Group Live, Webcast - 2 hour
Field of Study: Marketing
BLI Curriculum: Business Management
Author/s: Greg Conderacci

Finding Your Way Through Career Transitions

Do you want to be ready for the next step in your career? A promotion, a new job, a move to another city, a merger of firms - these are only a few of the transitions you can expect in your career. You can't prepare for every eventuality, but you can be ready for almost any thing that can happen. This is a highly-interactive course designed to give you hands-on experience that can be used immediately - whether you are trying to sell an engagement, convince a colleague about the merits of your ideas, or looking to make a key career move. (This course is also available in a 4-hour format.)

Objectives: Learn to articulate your mission in a way that you can use to market yourself and make key career decisions • Discover insights about how you can package your services in a way that makes you more attractive to your prospects, clients, and current or future employers • Develop an approach to positioning yourself to gain a competitive advantage • Study the solid marketing ground work to apply to your business and career • Review marketing tactics, tips and tricks

Highlights: Combines proven marketing, organizational development and strategic planning techniques in an easy-to-use format

Designed for: Executives and professionals who want to market themselves more effectively

Recommended CPE: 8
Prerequisites: None
Event ID: WHO
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci

Five Smooth Stones – Facing Goliath and Winning

Are you facing the challenge of a lifetime It can be a difficult career transition, a terrific (and somewhat terrifying) business opportunity, or any major effort. Before David faced Goliath, he selected five smooth stones for his sling. This course gives you five strategies for succeeding in the face of seemingly overwhelming odds. (This course is also available in a 4-hour format.)

Objectives: Select your five smooth stones to carry into battle • Master the secrets of attempting any major challenge • Find the confidence to achieve your goals

Highlights: Confronting Goliath • Are you the right person for the job • If you're a shepherd, fight like a shepherd • What is your sling technology

Designed for: Anyone who is facing or wants to be prepared for challenges

Recommended CPE: 8
Prerequisites: None
Event ID: FSSF
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci

Fourth Annual First Friday Economic Outlook Forum - 2011

new

The Maryland Bankers Association, in participation with the Maryland Association of CPAs, Maryland Retailers Association, Maryland Chamber of Commerce and Maryland Association of REALTORS, proudly presents the Fourth Annual Economic Outlook Forum. The First Friday Economic Outlook showcases economic experts who will share valuable information about both current events and the future of the region's economy.

Objectives: Participants will hear the latest on current events in 2011 and get insight into the future of the region's economy.

Highlights: Current events in 2011 as of this broadcast • Future insight of the region's economy

Designed for: Leaders in the business community.

Recommended CPE: 4
Prerequisites: None
Event ID: FAEOF
Course Level: Overview
Format/s: Webcast - 4 hour
Field of Study: Economics
BLI Curriculum: Business Management
Author/s: Anirban Basu, J.D.

Fraud: Detection and Prevention

new

Fraud costs US companies $400 billion annually. 31% of fraud occurs in companies with fewer than 100 employees. Don't let your company be the next victim. Learn to identify and protect against the mist common types of business fraud.

Objectives: At the end of this course students will be able to: • Describe the most common types of frauds • Understand the red flags of fraud detection • Implement methods to prevent fraud through all departments

Highlights: Define the fraud triangle – opportunity, pressure, and rationalization • Discuss the characteristics of people committing fraud and the victim organizations • 10 proactive steps for prevention • Management responsibilities • Process for creating a fraud prevention system • What to do if fraud is detected

Designed for: Anyone in business

Recommended CPE: 8
Prerequisites: None
Event ID: FRAUD
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

From Controller to CFO: How to Acquire the Skills Needed to Make the Leap

When contemplating transitions in their careers, most individuals are uncertain about how to prepare for making these critical changes. This workshop describes a roadmap of the skills, competencies, and experiences needed to transition successfully from a Controller to CFO.

Objectives: Describe the four major CFO leadership roles • Assess your current skills and competencies against those of the successful CFO • Create a plan for how to increase your credibility, visibility and value in your current position in order to position yourself for career advancement.

Highlights: Understanding why leadership is a unique set of skills that cannot be acquired simply through greater technical expertise • How to build a base of credibility and trust • Using effective influence and relationship building techniques • How to get support for your ideas and increase your impact on the organization

Designed for: Controllers, Finance Directors, CFOs

Recommended CPE: 8
Prerequisites: Management experience
Event ID: FCCFO
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development
Author/s: Alan Patterson

From Slow Death to Sweet Success: Seven Survival Strategies

Life is full of what the British euphemistically call, bad patches, difficult times that can transition to a far better life -- or not. Yet history is full of strategies that can turn a career (or a life) around. From Robinson Crusoe to POWs in the Hanoi Hilton, these are the stories and strategies that can help you get out of a rut before it becomes a grave! This interactive, full-day program is for anyone, but especially for those who must lead others through periods of intense change.

Objectives: Make the decisions and take the actions necessary to change direction in your firm, career or personal life, and keep your cool at the same time

Highlights: Tips, tricks and tactics for wresting victory from the jaws of defeat • Freezing is a slow and (almost) painless death: how to recognize the big chill in your life and get the blood circulating again • Recovering from the home run pitch: what to do with that cinderblock in your stomach when the other team wins big -- thanks to your mistake • Fatigue makes cowards of us all: what to do when work-hard/play-hard doesn't work anymore • What price freedom Do desperate times require desperate measures • Endurance: when is it good When is it bad • Changing your mind: so much for staying the course • Too many choices • Finding focus

Designed for: Leaders who need to establish a clear direction for themselves and others

Recommended CPE: 8
Prerequisites: Management experience
Event ID: SDSS
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci

From Technical Expert to Financial Leader: How to Make a Critical Leap in Your Career Development

When contemplating transitions in their careers, most individuals are uncertain about how to prepare for making these critical changes. This webcast highlights a roadmap of the skills, competencies, and experiences needed to transition successfully from a Controller to CFO.

Objectives: Describe the four major CFO leadership roles • Assess your current skills and competencies against those of the successful CFO • Create a plan for how to increase your credibility, visibility and value in your current position in order to position yourself for career advancement

Highlights: Understanding why leadership is a unique set of skills that cannot be acquired simply through greater technical expertise • How to build a base of credibility and trust • Using effective influence and relationship building techniques • How to get support for your ideas and increase your impact on the organization

Designed for: Controllers, Finance Directors, CFOs

Recommended CPE: 2
Prerequisites: Management experience
Event ID: FCCFO-W
Course Level: Intermediate
Format/s: Webcast - 2 hour
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development
Author/s: Alan Patterson

Course Listing

FRx Report Design Essentials I

FRx Report Design Essentials – It covers the basic report design skills you need to create, maintain and distribute presentation quality financial statements using FRx. It also includes coverage of additional functionality designed to help you create new reports, and distribute and analyze your company's financial information. You will learn about basic foundational skills, complex calculations, drag and drop reorganization, rounding adjustments and account sets.

Objectives: Gain a thorough understanding of creating and distributing financial statements in a variety of formats using FRx

Highlights: Learn basic navigation and report creation in FRx • Review techniques to drill down, analyze, print and export from the FRx Drilldown Viewer • Explore ways to efficiently create and distribute many financial reports • Examine tips and tricks for increasing speed and accuracy of month-end close • Learn how to troubleshoot tough reports • Create presentation quality reports • Perform electronic distribution including chaining, e-mail and sending reports to FRx WebView • Understand security settings within FRx • Learn how to improve your company's financial reporting package

Designed for: New FRx users; CPAs who would like to provide financial statement design services to clients using FRx; Intermediate and experienced FRx users who would like to refresh their skills or develop broader product proficiency

Recommended CPE: 16
Prerequisites: Basic report design skills
Event ID: FRX1
Course Level: Intermediate
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Matthew Wilson

Getting Things Done – Engaging People to Execute Effectively

Leaders are responsible for ensuring people execute organizational strategy and achieve goals. However, telling people what to do is impracticable -- people won't necessarily do what they're told to do and no leader has the time to figure out and communicate exactly what each person needs to accomplish. The key to execution is knowing how to communicate expectations, and how to develop people's ability to think and act appropriately and effectively. Participants in this program will review the highlights of Larry Bossidy and Ram Charan's execution and the skills of facilitation to develop people's thinking and encourage execution. This program is also available in a 2-hour format.

Objectives: Identify the keys to execution • Identify the elements of facilitation essential to leadership effectiveness • Practice facilitating thinking and action

Highlights: Why effective leaders spend 40 percent of their time on people and people issues • How to use conversation to develop individual thinking and ownership • How to gain commitment to action that aligns with organization strategy

Designed for: Leaders who deal with a changing market and who want to make sure the right things get done

Recommended CPE: 8
Prerequisites: Management experience
Event ID: LEAF
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour, Self Study: Video On-Demand
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Goodbye Leadership. Hello Leadershift!

Emmanuel Gobillot is one of Europe's most sought after business speakers and author of The Connected Leader: Creating Agile Organizations for People, Performance, and Profit and his latest book, Leadershift: Reinventing Leadership for the Age of Mass Collaboration. He has been described as "the first leadership guru for the MySpace generation" and "the freshest voice in leadership today." As we look at global and social trends affecting all business, we're excited to bring Emmanuel's high energy, thought provoking perspective and new leadership formula to the Business Learning Institute. His formula, Leadership + Collaboration = Innovation, will leave you and your team inspired, asking bigger questions, taking more risk and living with purpose. Why wait. (available as a keynote)

Objectives: Develop specific leadership attributes for your organization • Discover what a leadership brand should be • Understand what a development program would look like • Learn how to collaborate and build partnerships that work with organizations • Become more innovative • Take away a new focus and new tools to make your organization more agile

Highlights: Leadership • Collaboration • Innovation

Designed for: Anyone who aspires to be a forward-thinking leader

Recommended CPE: 1
Prerequisites: None
Event ID: LSHIFT
Course Level: Overview
Format/s: Webcast - 1 hour
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Emmanuel Gobillot

Great to Good? Using the Lessons of Good to Great AND How the Mighty Fall

The book "Good to Great: Why Some Companies Make the Leap.And Others Don't" is a perennial business best seller. But in recent years, many of the firms in the book have fallen - spawning another best seller by Jim Collins: "How the Might Fall And Why Some Companies Never Give Up." Both books together contain many lessons for trouble times. Taken together, they outline a strategic approach to building great organizations while avoiding the pitfalls that can trip even the mighty. This course seeks to help you apply those principles to your practice. (Available full day or half day or as a keynote)

Objectives: Apply the principles of both books to your practice, including the Good to Great principles: • Apply Level 5 Leadership • First Who, Then What • Confront the Brutal Facts • The Hedgehog Concept • A Culture of Discipline • Technology Accelerators • The FlyWheel and the Doom Loop AND, the How The Mighty Fall lessons: • The Five Stages of Decline - and how to reverse them • How leaders set their companies on the path to decline • The key "markers for each stage of decline and how to recognize them.

Highlights: Test the Good to Great/How the Mighty Fall principles against the challenges you face • Learn the Good to Great vocabulary that has become part of the language of business • Discover insights that leverage your efforts over the long run

Designed for: Anyone who is in a leadership position or aspires to be

Recommended CPE: 4
Prerequisites: Experience in a leadership position
Event ID: GTOG
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development Strategic Management
Author/s: Greg Conderacci

Guide to Compilation, Review and the Cash and Tax Basis of Accounting (Latest Edition)

Participants will gain an understanding of the CPAs increased responsibilities of detecting and reporting fraud during review engagements. Coverage will reflect the most recently issued authoritative literature and use case studies to illustrate the accountant's responsibilities. Course content will focus on the role of the CPA providing accounting, consulting and financial statement services. (Content can be customized to client needs)

Objectives: Become aware of the changes to compilation and review engagements brought about by recently issued standards • Get an overview of some of the most urgent issues which the profession faces today • Gain an appreciation of ARSC's projects involving bookkeeping services, quality control and reliability • Become familiar with reporting standards for personal financial statements • Understand the display, reporting and disclosure issues involving OCBOA statements and how they can provide more cost-effective reporting

Highlights: SSARS review: Compilation, review and audit • Bookkeeping and accounting services • Fraud and review engagements • ARSC projects and plans • Using analytical procedures in review engagements • Personal financial statements • SAS No. 62 and subsequent guidance • Interpretation No. 14 and OCBOA disclosures • Case studies and questions

Designed for: Accountants in public practice and industry who prepare compiled, reviewed or OCBOA statements and need to gain an understanding of recent authoritative literature and changes in the practice environment

Recommended CPE: 8
Prerequisites: None
Event ID: CRO
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

High Performance Time Management: Boosting Your Personal Energy

Old fashioned time management is sooo 20th Century. These days, it's energy management that makes all the difference. In a world of rapid change, the orderly management of scarce time is almost obsolete - there are too many surprises. Even worse, while carefully husbanding your time, you can easily miss opportunities. The secret of success is focusing, increasing and leveraging your most precious commodity: your energy.

Objectives: Pro athletes train constantly to be physically and mentally ready to perform with peak energy over short periods of time – a game or a match. Yet in business, professionals must perform over many days or weeks, often without much of a break. This course seeks to use secrets from sports, science, psychology, literature and even history to help you: • Husband and focus your energy for peak performance when it matters • Avoid "energy sinks" that can sap your strength when you need it most • Develop strategies to improve your health and your career.

Highlights: Forget about time management; manage your energy • The different types of energy and what they can do for you • Why you're "tired".and what to about it • Balancing the mental game and the physical game • Training for the kind of energy you need most.

Designed for: All

Recommended CPE: 8
Prerequisites: None
Event ID: ENERGY
Course Level: Basic
Format/s: Group Live, Webcast - 2 hour
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci, Robert "Hap" Cooper

Course Listing

Hire the Lucky Ones – How to Improve Retention and Productivity by Selecting Fortunate Employees

It never fails. A few unlucky employees often cause a high percentage of an organization's worker's compensation claims, safety issues and productivity problems. Wouldn't it be great if you could spot bad luck before you make a hiring offer, or coach fortunate skills in existing employees

Objectives: Build understanding of good fortune as a pattern of behavior, not divine intervention or an attitude thing • Clarify how to best assess positive behaviors in the hiring process • Review of best practices in coaching lucky behaviors in your employees (or yourself)

Highlights: Discover why it isn't attitude - it's behavior • New research defining the behavioral basis of fortunate behaviors • Offers an innovative use of assessment tools in the screening of those behaviors in the hiring process

Designed for: Organizations and hiring managers looking for a new viewpoint on hiring, leadership and group dynamics

Recommended CPE: 4
Prerequisites: Management experience/HR
Event ID: IRP
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Leadership Development
Author/s: Karl Ahlrichs, SPHR

Hiring, Firing and Everything in Between new

How often have you hired a new employee believing he/she could "walk on water" only to discover that, within 3 months, you needed to terminate your new hire? How often have you known you should fire someone only to procrastinate and let the problem fester? How many times have your coaching or counseling efforts fallen on deaf ears? (Available in 4 and 6 hour format)

Objectives: To enable managers and executives to: make more effective hiring decisions, orient and train new hires in a way that ensures their success, conduct effective coaching sessions, conduct lawful terminations (when necessary) and retain top talent

Highlights: Hiring:: Conducting the behavioral interview, getting reliable references, avoiding legal land mines • Orienting and training the new hire • Motivating employees for improved performance • Coaching the difficult employee to "own" his/her problem • Determining when termination is the right course of action • Protecting your organization

Designed for: CEOs, Managers and Practice Owners, Human Resource Managers

Recommended CPE: 6
Prerequisites: None
Event ID: HIREFIRE
Course Level: Basic
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Business Management
Author/s: Sheila Birnbach

How Audited Entity Managment. and Governance Can Influence a More Effective & Efficient Financial Statement Audit

This course involves clarifying the standards that external auditors are required to follow. However, the other part of the this course relies on encouraging audited entities to take a greater responsibility for generating reliable financial statements for audit, improving internal control over financial reporting, and overseeing services provided by the external auditors. Assuming audited entities are successful, this may mitigate potential increases in audit fees. (Offered as a webcast in four 1-hour segments)

Objectives: Discuss key concepts related to how audited entities can assume more responsibility for reliable finanical reporting to decrease risk that financial statements are materially misstated. Also available as a four-part series webcast.

Highlights: *Part 1:* Financial Statement Audit Fundamentals *Part 2:* Reasons behind the Evolutionary Requirements in Financial Statement Audits *Part 3:* Top Five Ways Proper Implementation of Auditing Standards Increases Audit Quality *Part 4:* Top Five Actions Entities Should Take Now to Better Prepare for Upcoming Audits

Designed for: Personnel, management, boards of directors or other relevant parties associated with an audit of an entity's financial statements

Recommended CPE: 4
Prerequisites: Experience with using financial statements
Event ID: INSFSA-W
Course Level: Basic
Format/s: Group Live, Webcast - 4 hour
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

How the Best Financial Executives Create High Performance Organizations

The key to creating a high performance culture is an effective leadership team, one that embraces change, sets priorities and meets organizational challenges head on. Ultimately, success is based on their ability to continuously scan the business environment and realign the organization for maximum performance. This course is ideally suited as an 8-hour working session for intact teams to assess, analyze, and create plans for better alignment and more effective execution. Such teams include the C-suite executive team, functional/departmental organizations, customer account teams, and cross-functional project or implementation teams. One hour for advanced orientation and preparation is required.

Objectives: Understand the role of the Leadership Team in creating the High Performance Organization (HPO) • Be able to assess the teams capability to operate strategically and perform at a high level • Develop a plan for more effective organizational alignment & execution

Highlights: The elements of a High Performance Organizational culture • Organizational and team assessment tools • Roles and responsibilities of the leadership team • Business case analysis

Designed for: CFO and the other members of the C-suite executive team; CFO with his / her leadership team; finance and accounting team members; project managers / cross-functional implementation teams

Recommended CPE: 4
Prerequisites: Management experience
Event ID: HPO
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Business Mgmt & Organization
BLI Curriculum: Strategic Management Performance Management
Author/s: Alan Patterson

How to Build a Culture that Maximizes Trust, Accountability, and Performance

In high change environments and in particular during this period of economic turmoil financial leaders must create a culture that maximizes performance, respect, and accountability if they are to survive in the long run. This course describes the process and tools needed to transform the organizational culture. (Available in 4 or 8-hour format)

Objectives: Be able to define the elements of organizational culture • Know how to identify the drivers for successful cultural transformation • Have knowledge of the tools that translate vision and strategy into specific expectations and behaviors

Highlights: How to improve the ramp up time for implementing the new culture • The Big 3 cultural elements: treatment of people, decision making, and communication • Determining which employees are most likely to succeed in the new culture • The relationship of culture and politics • How metrics, recognition and rewards reinforce the culture

Designed for: CFOs; CFO with the finance and accounting leadership team; finance directors and managers with their team members

Recommended CPE: 8
Prerequisites: Management experience
Event ID: CNCC
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development Performance Management
Author/s: Alan Patterson

How to Communicate Like a Leader

As an executive, partner, or high-level manager, you cant afford to lose productivity due to miscommunication. Its not enough to have a vision or strategy; you must also be able to communicate your initiatives to your staff. You need to know how to adapt to each staff member to obtain maximum productivity and motivation, while avoiding conflict and misunderstandings on a daily basis. Your personal credibility, as well as your companys or firms reputation, depends on your ability to communicate effectively. At your level, you can no longer afford to ignore the implications of good communication. This course will show you how to use the DiSC Behavior Profile as a tool to learn more about yourself as a leader. The program will focus on how to improve manager / staff relations by developing more effective communication skills and lead more successfully by learning how to adapt your style to others.

Objectives: Improve manager / staff relations by developing more effective communication skills • Reduce conflict and improve morale • Increase office productivity • Determine your own natural behavior style

Highlights: Discover why some of your staff members do things that drive you crazy and how you can cope • How to identify the behavior styles of others and techniques to adapt to your staffs behavior styles • Build on your strengths and work on areas that need improvement • Understand different motivations and learn how to know who responds to what and when

Designed for: Executives, partners, directors, senior managers, or department heads

Recommended CPE: 8
Prerequisites: People who are leaders in their company, department, or firm; those who manage staff
Event ID: CLL
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

How to Hire the Right Candidate: A Selection and Interview Process That Gets You What You Need

Selecting the best candidate for a position requires a hiring manager to see not only what an individual has accomplished, but also how that person achieves results. However, the over-reliance on resumes and under-reliance on effective interviewing techniques often stand in the way of the best selection decision.In this workshop, you will learn the basic principles of data-based interviewing, also known as behavioral event interviewing a process that requires setting clear performance standards for the position and using specific questions and listening techniques to calibrate a candidates competencies against the standards

Objectives: Become familiar with the elements of the competency-based selection process • Understand the data-based interview • Recognize the roles and responsibilities of the hiring manager and interview team

Highlights: The pitfalls of traditional interview questions and techniques • How to go beyond the job description to scope out the position • Data-based interview techniques • The art of asking the right questions • Effective probing and listening strategies • How to evaluate an individuals fit with the organizations culture • The role of the interview team

Designed for: Hiring managers; interview teams

Recommended CPE: 4
Prerequisites: Management experience
Event ID: HIRE
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Business Management
Author/s: Alan Patterson

How to Survive Negative Times by Using Positive Communication – Your key to Increased Productivity and Profitability

Everyone is tired of hearing about the negative economy, the bad times, and the decreasing revenues. Discover how your company or firm can increase productivity and improve revenue by using positive, professional communication. People form opinions about your talent as a leader based on your ability to communicate. Are you sending a positive, professional image? Is your company or firm losing profits because staff is wasting time with confusion and misunderstandings? Are you losing clients because they don't perceive you as credible or knowledgeable? This course will teach you how to communicate effectively, to improve efficiency, reduce misunderstandings with staff, and retain clients. Relevant examples and practical techniques will be present so that you can use them immediately to improve productivity. In this interactive session, youll receive opportunities to practice your new skills with exercises and activities.

Objectives: Improve your company's or firm's reputation (and revenue) by communicating more effectively • Increase office productivity • Avoid costly errors with clients due to miscommunication

Highlights: How to create clear expectations for your staff • Improving relationships with your staff • Decreasing staff conflict and improve morale

Designed for: All

Recommended CPE: 8
Prerequisites: People who manage staff or who interact with clients
Event ID: POSCOM
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

I Said, You Said: 3 Steps to Effective Communication

Why can't there be a simple way to approach sharing and acquiring information? There are so many possible strategies for communicating effectively, who can remember each one, let alone use it in the right situation. This program presents a three-step process for communicating effectively in any situation. Participants will have the opportunity to practice the steps and develop their skill.

Objectives: Employ a three-step approach to communicating effectively with someone else during a conversation • Recognize differing communication challenges and personal styles and approach each confidently • Develop listening and probing skills that improve communication

Highlights: Review and practice meaningful dialogue skills that improve relationships, increase the amount of information shared, and develop personal skills of influence and leadership • Learn how to sequence a conversation that can succeed for each participant • Assess how we inhibit successful communication, usually with no intention of doing so

Designed for: Professionals who recognize that sharing and acquiring information can be challenging and who want to improve their personal ability to lead and influence others

Recommended CPE: 8
Prerequisites: None
Event ID: C3E
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

I2A: Strategic Thinking that takes Insights to Actions new

The i2a Strategic Thinking System is a five stage process that teaches critical and creative thinking. The system is designed to yield a thoughtful strategic plan that is realistically optimistic, leverages the strengths of the organization, is aligned with a shared vision and provides the detail that gets the work done. Unique to the i2a System are the powerful "share the air" wall charts that facilitate collaboration and creativity and teach the impact of making your thinking visible to others. In addition, the process of the i2a Strategic Thinking workshop is designed to fundamentally change the way in which leaders think. **Certification and licensing is available for this product.*

Objectives: I2a can be utilized by individuals who want to increase their strategic thinking skills or by an organization that wants to build a strategic plan and align their organization simultaneously.

Highlights: Create a shared strategic direction and plan for the organization while simultaneously teaching a new conceptual framework for thinking, creating, communicating and inspiring others • Designed for a single organization and will produce a draft strategic plan • Learn a new conceptual architecture for thinking, creating, communicating and inspiring others that you can take back to your organization.

Designed for: People who want to learn to think more strategically within their organizations

Recommended CPE: 16
Prerequisites: None
Event ID: I2A
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Strategic Management Communications Skills
Author/s: Tom Hood, CPA, CITP, Gretchen Pisano

Identifying, Developing, and Hanging on to Talent

Developing organizational talent is too critical to leave to chance. Unfortunately, many businesses wrongly equate talent development with the annual performance review process. This course will present a proven approach on how to elevate the most talented staff within your organization.

Objectives: Understand the specific and critical steps in the talent development process • Learn how to increase the capability of leaders and managers to take full advantage of on-the-job development to acquire, practice, and apply new skills

Highlights: Defining a talent management culture • Using competency-based assessment tools • Integrating performance management and talent management systems • How to handle the loss of talent • Developing organizational and professional capabilities • Executive sponsorship

Designed for: Executive teams; executives, directors, and managers; human resource organizations

Recommended CPE: 4
Prerequisites: Professionals with management experience
Event ID: IDHT
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Personnel/HR
BLI Curriculum: Leadership Development Performance Management
Author/s: Alan Patterson

IFRS Update new

This course focuses on the current status of the IASB and FASB convergence projects, such as revenue recognition, leases, financial statement presentation, and more. An examination into issued exposure drafts, and new IFRS standards will be conducted. In addition, any new information concerning the SEC 's deliberations toward implementation of IFRS in the U.S. will be presented. (Available in 1 - 2-hour format)

Objectives: Participants will be able to: • Discuss the current status of the IASB and FASB convergence projects • Summarize the specifics as it relates to discussion papers, exposure drafts, and new IFRS standards • Discuss the current position of the SEC as it relates to the implementation of IFRS

Highlights: Overview of principles based accounting • Convergence of IFRS and US GAAP • Status of SEC Workplan • IFRS implementation in US • New IFRS and US GAAP Standards • IFRS for SME's

Designed for: Accountants, users, & preparers of financial statements

Recommended CPE: 2
Prerequisites: Knowledge of IFRS
Event ID: IFRSUPDT
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Strategic Management
Author/s: Peter Margaritis, CPA, MAcc

Course Listing

IFRS vs. GAAP: The Differences That You Need to Know

This course will explain the differences between the International Financial Reporting Standards (IFRS) which are principles-based standards and U.S. GAAP which are rules-based standards. There will be discussion of how this accounting transition began, along with an update on the current developments from the SEC, FASB, and the IASB. Comparison of the financial statements under each standard along with analyzing the differences in the accounting treatment for assets, liabilities, revenue and expense recognition, business combinations, and consolidations. The session will conclude with a discussion concerning IFRS 1 - First Time Adoption.

Objectives: Review the history that has lead up to 113 countries adopting IFRS and abandoning their country specific accounting standards • Examine current developments with the FASB and IASB convergence project • Analyze the differences between the financial statements prepared under IFRS and US GAAP and between the accounting treatment for assets, liabilities, equity, revenue, and expenses under IFRS and US GAAP

Highlights: Financial statement presentation • Prospects and timetable for IFRS-US GAAP convergence • Short term convergence topics • IASB and FASB joint projects • Current significant exposure drafts relating to convergence issues • Inventory methods and valuation • PP&E revaluation and depreciation • Intangible assets • Impairment testing • Leasing • Liabilities • Deferred taxes • Revenue and expense recognition • Business combinations • Consolidation

Designed for: Accountants, users, & preparers of financial statements

Recommended CPE: 8
Prerequisites: Knowledge of basic accounting
Event ID: IFRSGAAP
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Strategic Management
Author/s: Peter Margaritis, CPA, MAcc

The Impact of IFRS and Other Global Standards on Private Entities

This course will explore all of the global professional and regulatory standards currently impacting private entities.

Objectives: Participants will be able to discuss the most important considerations and issues related to the impact of converging to global professional and regulatory standards for U.S. private entities that desire to adopt the less complex IFRS for Private Entities over full-blown IFRS

Highlights: How did the need and desire for convergence to a single global set of standards evolve • Opportunities and obstacles involved with transitioning to IFRS • Is IFRS really less complex than U.S. GAAP, and what are the critical differences • Differences in the two variations of IFRS • IFRS standards and interpretations that are relevant for private entities • How will these changes impact financial statement presentation and disclosure for private entities • Transitioning from U.S. GAAP to IFRS • What other global professional and regulatory standards are also converging with U.S. standards (generally accepted auditing standards, ethics and independence rules, etc.)

Designed for: Anyone interested in the potential impact of the use of IFRS for Private Entities

Recommended CPE: 8
Prerequisites: Some knowledge of regulatory standards
Event ID: IFRSJL
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour, Self Study: Video On-Demand
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Improve Cash Collections With Lean

What if you could improve cash flow by shortening your current cash collection process not just by hours or days but by weeks? What would an infusion of cash into your business mean in today's environment? This timely course addresses cash flow issues in a troubled economy to help you face the recession head-on.

Objectives: Understand the benefits of lean methods versus traditional improvement techniques • Be able to create an action plan for improving collection of cash and plan for kaizen events in accounting and other office processes

Highlights: Basic introduction to lean • Lean tools and techniques • Identifying value add vs. non-value add • Practicing a kaizen event with a focus on the cash collection process • Building a lean accounting roadmap

Designed for: Anyone concerned about improving cash collection owners, CFOs, controllers, accounting managers, credit & collection teams, office managers, sales managers and lean leaders

Recommended CPE: 8
Prerequisites: None
Event ID: ICCL
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jean Cunningham

Improve Productivity by Avoiding Conflict & Miscommunication

Seventy to ninety percent of all communication is misinterpreted. Miscommunication leads to conflict, and conflict leads to lost productivity. Can you afford to misunderstand your staff, colleagues, or clients Most conflict situations can be avoided by simply listening, yet only ten percent of professionals have ever had a class on listening skills. Test your listening skills and discover your natural listening approach. This interactive course is filled with exercises and activities that will help you to improve efficiency within your company, department, or firm. You will learn specific techniques you can use now and be able to see immediate results (less confusion, fewer errors, and clearer communication). When you improve your listening skills, you gain respect from others.

Objectives: Increase revenue by decreasing costly errors due to miscommunication • Identify your natural listening style • Build on your natural listening strengths • Learn the appropriate listening style for different situations and how you can adapt your listening skills

Highlights: Six practical techniques to improve your listening skills • Creating harmony in the office by reducing misunderstandings • Improving productivity by decreasing the amount of time wasted on confusion • Avoiding conflict by understanding the other persons viewpoint

Designed for: All

Recommended CPE: 8
Prerequisites: People who manage staff or who interact with clients
Event ID: PACM
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

Independence & Objectivity for Attest Service Providers

This session is designed to provide participants with a solid understanding of one the most important judgment calls made before an attest engagement even begins - whether an accountant is independent to accept or continue with attest services for a client. While this decision is made by the person with final attest authority, the impact of this conclusion has a direct impact on the entire engagement team, as appropriate safeguards to mitigate or eliminate threats to independence and objectivity may be necessary in order to comply with professional and regulatory standards (AICPA, GAO, PCAOB, and SEC).

Objectives: Describe appropriate safeguards to mitigate or eliminate threats to independence and objectivity when providing attest services to clients

Highlights: The governance of the accounting profession • The importance of independence, when independence is required, and why you must be independent both in fact and in appearance • The purpose and basic structure of the AICPA Conceptual Framework for AICPA Independence Standards • Various threats that may impair independence and objectivity • Fee issues and their effect on independence and objectivity • Discuss the necessary documentation of appropriate safeguards that mitigate or eliminate threats to independence and objectivity • Major provisions of the SEC, the PCAOB and the GAO independence rules that enhance the AICPA Conceptual Framework

Designed for: Anyone who is new to auditing or desires a refresher in independence and objectivity requirements in accordance with professional and regulatory standards

Recommended CPE: 2
Prerequisites: None
Event ID: IND
Course Level: Basic
Format/s: Group Live
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Insights From The C-Suite

This program will address these issues and more including the big picture, managing the board, the value-drivers, business vs. corporate, financial services, risk management and economic analysis.Available in 4 and 8 hour formats

Objectives: Understand the totality of issues facing CFOs and CEOs in order to help you better conduct your activities and advise and your colleagues/clients to make more informed business and financial decisions

Highlights: Managing the board • The value drivers • Business vs. corporate • Financial services - how best to deliver sophisticated accounting, finance, planning and compliance services with a partnering mind-set, ensuring business buy-in, no surprises or missed deadlines. • Risk management - how best to assess and manage both financial and enterprise risk, not just from a perspective of “what might go wrong” but “what must go right” to achieve organizational objectives • Economic analysis - how best to apply macro- and micro-economic theory and analysis to better address the impact of business cycles on investment and operating decisions, including how to measure and account for the economic effects of transactions

Designed for: CPAs and other finance professionals who want to: 1) expand their knowledge of business management and finance, and 2) work more effectively with C-Suite executives by anticipating their needs and accountabilities

Recommended CPE: 4
Prerequisites: Management experience
Event ID: IFCS
Course Level: Intermediate
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Robert Tarola, CPA

Course Listing

Integrating Organizations, Blending Values

Mergers, acquisitions and strategic partnerships succeed or fail based on leadership's ability to integrate diverse organizations at both a process and relationship level. In this course, you will learn the critical steps which need to be taken for two organizational cultures to be successfully blended into one coherent, functioning team. It is well-suited as an intervention session for members of merged or newly integrated organizations.

Objectives: Understand the best practices needed for successful organizational integration • Learn to assess organizational capabilities and strengths • Develop a strategy and action plan for aligning different organizations and blending their values

Highlights: The importance of clearly defined business objectives • Building trust and credibility • Critical success measures • Effective relationship management • Assessment of potential business partners • Overcoming obstacles to current and future success and expanded capability

Designed for: Executive teams; senior level executives and managers; sales and supply chain managers; integration teams composed of members from both/all organizations; departmental teams

Recommended CPE: 8
Prerequisites: Professionals with management experience
Event ID: IOBV
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Alan Patterson

Internal Controls Design, Evaluation and Communication for Not-for-profits

Significant changes in the auditing industry have highlighted the necessity for all entities, regardless of nature, size and complexity, to have a well-designed and effectively operating system of internal controls over reliable financial reporting. This course will provide practical guidance on exactly what a sound system of internal controls looks like, and the resulting impact on the financial statement audit. The program qualifies towards the 24-hour Yellow Book requirement.

Objectives: Understand key components of internal controls and the important role each plays • Be able to test controls for operating effectiveness • Differentiate an external financial statement auditor's responsibilities related to internal controls depending on the professional or regulatory standards being followed

Highlights: The evolution of internal controls theory and practice, including emerging guidance specific not-for-profit entities • Comparing and contrasting specific types of internal controls • Evaluating design and implementation of an entity's design on internal controls • An external auditor's responsibility for evaluating and communicating identified deficiencies in internal controls through the financial statement and compliance audits

Designed for: Accountants in public and private practice responsible for designing, evaluating and/or monitoring internal controls over financial reporting

Recommended CPE: 8
Prerequisites: Audit experience
Event ID: ICDNP
Course Level: Intermediate
Format/s: Webcast - 2 hour, Group Live
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Internal Controls for Smaller Entities - Practical Case Studies in Design, Evaluation and Communication

In this course, we will use extensive exercises and case studies to reinforce fundamental theory through "real-life" scenarios that both internal and external accounting personnel performing internal control-related activities in a wide variety of industries will find beneficial. The program qualifies toward the 24-hour Yellow Book requirement.

Objectives: Recognize the key components of a sound system of internal controls over financial reporting • Compare and contrast an external auditor's responsibilities under various professional standards, including Yellow Book and A-133 compliance

Highlights: Design of internal controls for common classes of transactions for smaller entities • Identifying and evaluating the sufficiency of key controls to satisfy control objectives • How to verify whether an understanding of the design of internal controls has actually been "implemented" • Case study on testing key controls to gain assurance about operating effectiveness • The impact of internal control design and operating deficiencies on the risk of material misstatement related to financial statement audits • Emphasizing SAS 70 considerations when an entity uses an outside service organization • Clarifying how the work of others can be leveraged by external auditors

Designed for: Internal and external accounting/auditing personnel who have responsibility for designing, evaluating or communicating deficiencies in internal controls

Recommended CPE: 8
Prerequisites: None
Event ID: ICDEC
Course Level: Basic
Format/s: Webcast - 2 hour, Group Live
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

International Financial Reporting Standards (IFRS)

Do we all need to go back to college to re-study accounting? The US is moving towards a set of global accounting standards, IFRS. This course introduces to participants this upcoming area of accounting.

Objectives: Introduce participants to IFRS and how IFRS may be needed for their practice

Highlights: Who establishes IFRS • How are they the same as US GAAP • How do they differ from US GAAP

Designed for: Any level professional staff in public accounting or industry

Recommended CPE: 4
Prerequisites: Basic knowledge of accounting obtained through education or experience
Event ID: IFRSB
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Gary Bulmash, CPA

International Financial Reporting Standards (IFRS) From 5,000 Feet

This course will provide an overview of the transition from U.S. GAAP to IFRS. The differences between IFRS (principles-based) and U.S. GAAP (rules-based) will be outlined. There will be discussion of how this accounting transition began, along with an update on the current developments from the SEC, FASB, and the IASB. Finally, financial statements will be analyzed under both standards, along with the current developments on the joint financial statement preparation project.

Objectives: Know the history that has lead up to 113 countries adopting IFRS and abandoning their country specific accounting standards • Understand current developments within the U.S. concerning the adoption of IFRS • Examine the difference between the term adoption and convergence • Have knowledge of current developments with the FASB and IASB convergence project • Be able to analyze the differences between the financial statements prepared under IFRS and US. GAAP

Highlights: Financial statement presentation • Prospects and timetable for IFRS-U.S. GAAP convergence • IASB and FASB joint projects • Current developments

Designed for: Accountants, users, and preparers of financial statements

Recommended CPE: 1
Prerequisites: None
Event ID: IFRS5000
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Strategic Management
Author/s: Peter Margaritis, CPA, MAcc

International Financial Reporting Standards: An Overview of the Looming Change to Global Standards new

The SEC is in the process of considering to create a road map for transitioning U.S. companies to global rules related to accounting and financial reporting standards. The hope is that use of a single, high-quality standard will eventually empower investors to make better-informed investment decisions by enabling them to easily compare financial statements worldwide. There are both supporters and detractors for this initiative. This course will explore both viewpoints by providing an overview of why adopting IFRS for U.S. companies may be desirable, including consideration of the likely widespread impact on all users of financial statements (both positive and negative). (Also offered in 4-hour format)

Objectives: Upon completion of this course, participants will be able to: • Explain what is involved with transitioning to IFRS for companies, industries, the business world, and society • Discuss why there is such momentum to change from time-tested U.S. GAAP

Highlights: The imminent trickle-down impact of the SECs current acceptance of IFRS-prepared documents for certain foreign registrants • Is IFRS really less complex than U.S. GAAP • Review of the costs and benefits of making the transition

Designed for: Professionals interested in the potential transition to international financial reporting standards

Recommended CPE: 4
Prerequisites: None
Event ID: IFRS3
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Interviewing to Avoid Costly Mistakes in Hiring new

When hiring professional people, we are usually seeking people with a particular skill or professional background. We traditionally rely on resumes, interviews, and background/reference checks to make hiring decisions. On the surface, employment candidates may shine at their very best. But, troublesome characteristics may lurk below the surface, and not emerge until the person is already hired. Personnel costs usually represent a large expense, so hiring employees without requisite skills can be extremely costly. It is vital the people involved in the recruiting, interviewing and hiring process identify all the skill sets that are needed for the job.

Objectives: This course will assist those involved in the recruiting, interviewing and hiring process to approach their assigned tasks with the necessary skills and mindset needed to avoid costly hiring mistakes. The course uses "behavioral/situational interviewing" theory as a foundation that adds a dimension of "job-fit testing" to the hiring process. These techniques better objectively measure critical mental aptitudes and personality dimensions that are important for successful job performance for hired employees.

Highlights: Defining the key skills needed for the job (technical, performance and interpersonal communication) • Creating appropriate interview questions (including providing examples of questions) • Conducting the interview to gather the information you really need by getting to the "real" candidate • Avoiding common interviewing and hiring mistakes

Designed for: Anyone involved in the recruiting, interviewing and hiring process

Recommended CPE: 2
Prerequisites: None
Event ID: IACM
Course Level: Basic
Format/s: Group Live, Webcast - 2 hour
Field of Study: Personnel/HR
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

It Cost What! A Practical Approach to Implementing Activity Based Costing new

For the financial executive, coming to grips with the challenges of business and profitability have never been greater. However, traditional costing systems provide only minimal guidance to the financial and accounting professionals to assist in improving profitability. This course provides a step-by-step approach of how to effectively implement Activity Based Costing to improve profitability by converting existing GAAP statements to Activity Based Costing Statements. (Available in 4 or 8-hour format)

Objectives: Understand the principles of Activity Based Costing • Identify cost drivers in the business model • Recognize the link between activity based costing and lean operations • Implement a step-by-step conversion method to convert from standard GAAP statements to Activity Based Costing Systems • Develop an income statement based upon activities • Develop a balance sheet based upon activities • Identify segment profitability • Identify costs not allocated to any business segment for analysis and review • Identify the cost of capital and cost gap associated with each business • Make logical business decisions with accurate segment information in an unstable economic climate

Highlights: Develop an understanding of Activity Based Costing for decision making • Develop an accurate conversion model from existing statements to decision based financials • Develop cost gaps for management action for each business segment • Develop a process to accurately make financial decisions

Designed for: CEOs, CFOs and Controllers

Recommended CPE: 8
Prerequisites: Management experience
Event ID: COSTWHAT
Course Level: Intermediate
Format/s: Group Live
Field of Study: Management Advisory Services
BLI Curriculum: Business Management
Author/s: Frank Ryan, CPA, MBA

It's All in the Presentation: Designing Presentations to Sell Ideas Effectively

Technology allows us to present beautiful slides with animation, photographs, vivid color and even sound, but ultimately, the quality of a presentation depends on how well the ideas presented are sequenced and supported with the visuals. Participants will practice designing presentations that inform and persuade, and will develop visual aids that increase the impact of the ideas.

Objectives: Design effective, well-sequenced presentations that ensure listeners understand the information and its significance • Prepare presentations and back up information so that question and answer periods increase the positive impact of the presentation and the effectiveness of the presenter

Highlights: Sequencing presentations that inform and persuade • Using message-based visuals that focus listener attention on key information and logic • Developing contingencies for explaining difficult or complex ideas

Designed for: Professionals who need to successfully present ideas to clients, customers, executives and teams

Recommended CPE: 8
Prerequisites: Prior presentation experience
Event ID: DPSI
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

It's not Just the Question: Using Effective Communication Skills and Professional Skepticism while Gathering Information and Evidence

This course provides insights, tips, and techniques to better understand an auditors general responsibility with regards to professional skepticism. It also covers utilizing effective communication skills to better gain evidence through inquiry procedures, and overcoming common pitfalls related to inquiry procedures.

Objectives: Understand common non-verbal cues and how they are most commonly interpreted • Develop interviewing techniques to enhance your interactions with others and enhance the evidence gained through inquiries • Know what an auditors responsibility is as it pertains to professional skepticism on an audit, and understand the three factors that can influence your degree of professional skepticism • Be able to document a link between risk assessments and audit procedures

Highlights: Why is listening one of the hardest skills there is • How does inquiry fit into all the other procedures for gathering evidence in an audit • How can inquiry alone be limiting, depending on the audit objectives, and how do you supplement it to meet such objectives • Why is professional skepticism of an audit team historically so dependent on the executives of that team, and how can that be countered • In addition to lecture and discussions, role-plays, video-clips, and other exercises to reinforce the learning objectives and answer questions will be utilized

Designed for: Accountants, auditors, and other professionals who perform inquiry procedures and need to be objective in the performance of those and other procedures

Recommended CPE: 8
Prerequisites: None
Event ID: NJQUEST
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Brian Kush CPA, CISA, CITP

It's Not What You Say, It's How You Say It

People form perceptions about you (and make judgments about your capability as a CPA) based on how you communicate. Although its unfair, its fact. Are you portraying the image of a confident, knowledgeable CPA or manager? Are you presenting a professional impression to your clients and staff? It doesn't matter how much you know if youre unable to share that information in a professional, competent manner. You can make a professional, credible impression on both clients and staff by improving not only what you say, but how you say it. In this interactive session, you'll learn practical techniques to improve your credibility and professionalism by utilizing effective verbal skills.

Objectives: Improve your verbal skills • Learn practical techniques to sound more confident and competent • Use more descriptive language to avoid miscommunication • Overcome annoying verbal bad habits

Highlights: The importance of diction, especially on the phone • How to use tone to communicate better • Recognize a smile can be heard • Avoiding embarrassing misunderstandings

Designed for: All

Recommended CPE: 8
Prerequisites: None
Event ID: ITSNOT
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

Key Financial and Economic Issues Facing the Financial Executive new

The course will explore the current economic trends and analyze their impact on you as the financial executive. The effects of regulatory policy as a major impact on an organization's costs and competitiveness as well as the combined impact of fiscal and monetary policy on financing for organizations are causing CFO/Controllers to understand the impact of decisions well outside their control in order to survive and grow. (Available in 4 or 8-hour format)

Objectives: Analyze the impact of the current credit markets on your banking relationship and financial needs of the organization and the organizations ability to raise capital * Determine the safety and soundness of the financial plans for your organization in an uncertain economic climate * Manage the debt and equity mix for your organization in a rapidly changing economic landscape * Determine the impact on an organization of competing in a global market place to include steps to take to become more competitive globally * Evaluate the impact of federal, state and municipal deficits and unfunded mandates as it relates to tax planning

Highlights: Understanding the current economic issues for the CFO/Controller to include: * Regulatory, Fiscal and Monetary policies impact on the organization * Hiring and human relations in a turbulent market * Managing the finances of the organization * Managing risk in an uncertain economic climate

Designed for: CEOs, CFOs and Controllers

Recommended CPE: 8
Prerequisites: Management experience
Event ID: KEYFINAN
Course Level: Intermediate
Format/s: Group Live
Field of Study: Economics
BLI Curriculum: Business Management
Author/s: Frank Ryan, CPA, MBA

Course Listing

Leader vs. Manager vs. Facilitator: When, Why, How?

New generations are bringing different expectations to the workplace, and globalization continues to increase the complexity of the situation by introducing new markets, new demands, and more diversity. How does any one individual enable others to produce results in this kind of environment? This workshop introduces and compares the differences between leading, managing and facilitating teams, divisions and organizations; the situations in which each of these approaches is appropriate; and some skills for getting better at switching between them effectively.

Objectives: Be able to define the similarities and differences between a leader, a manager, and a facilitator • Demonstrate the decision-making needed to determine which role will be appropriate and effective in different situations • Practice the skills of the three approaches available to "getting things done through others"

Highlights: Generational differences change the mix of facilitation vs. leading vs. managing • Enabling individuals to do what they do best to improve talent retention • Re-positioning relationships and power

Designed for: Anyone who works in an environment where diversity and rapid change are presenting challenges

Recommended CPE: 8
Prerequisites: Management experience
Event ID: LMF
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leaders as Coaches: Techniques for Maximizing the Development and Retention of Talent

Effective coaching is a critical, if not the critical component for successful talent development. Unlike performance management, talent development expands the leaders role far beyond evaluating an individuals performance. Successful coaches use techniques to develop an individuals strengths, traits, and values, transforming a persons capability into professional and organizational success.This course will review different coaching techniques and explain how they can improve the development and retention of talent. Participants will learn how to apply coaching best practices to current business situations.

Objectives: Review successful coaching techniques and how they improve the development and retention of talent • Learn why coaching is needed to transform finance and accounting organizations into partners with the business • Understand the different types of coaching conversations and how to conduct them • Learn how to apply coaching best practices to current business situation

Highlights: The coaching role and how it differs from traditional performance management • Different coaching philosophies • Isolating breakthroughs to overcome professional barriers and unproductive self-talk • How to have the tough discussions that challenge and support an individuals development • Case examples for effective and unproductive coaching techniques

Designed for: Financial executives, directors, and managers in business and industry; partners and senior managers in public accounting

Recommended CPE: 4
Prerequisites: Management experience
Event ID: COACH
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Leadership Development
Author/s: Alan Patterson

Leadership and Authenticity

In the wake of corporate scandals, leaders have been tasked to develop their authenticity. Being an authentic leader can help to develop trusting relationships throughout an organization, with clients/customers - and is key to leading any organization through challenging times, market shifts, and change. This course will help you define authenticity and its attributes and apply them to your own leadership style.

Objectives: Practice skills of interaction that showcase a leader's authenticity • Discuss the inter-relationship among authenticity, transparency, and integrity • Identify approaches to increasing personal authenticity, particularly in times of change and challenge

Highlights: Establishing connection and dialogue • Strategizing to broaden contacts and influence • Maximizing nonverbal and verbal consistency

Designed for: Professionals who recognize the importance and value of establishing and maintaining positive relationships.

Recommended CPE: 4
Prerequisites: Management experience
Event ID: LA-4
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership and Generations: What Are They Thinking?

Increasingly, generational differences are causing conflict and frustration in many organizations. Some of the differences, from how an employee views a dress code or work hours to how work gets done and what a full day of work means, are creating dissension. Each generation seems to be communicating: “What are they thinking “In this program, you will learn about generational differences and develop an appreciation for how valuable those differences can be. You'll identify the areas where differences are most evident and discover ways to deal with them. This includes giving and receiving feedback, managing performance expectations, and increasing organizational effectiveness, productivity and harmony.

Objectives: Identify the four generational groups in the workplace • Discover how these have shaped the generations and created noticeable differences • Identify differences and similarities between generations on specific issues • Identify the behaviors causing work conflicts • Develop practical techniques for working with multiple generations

Highlights: The differing roles technology plays in the different generations • Differences in communication styles • Does diversity affect the organization's effectiveness

Designed for: Leaders, managers, supervisors, administrators who work in a multi-generational environment

Recommended CPE: 4
Prerequisites: None
Event ID: GCMMG
Course Level: Basic
Format/s: Group Live, Webcast - 4 hour
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership and Retaining Talent: How the Generational Shift is Changing Leadership new

With a significant increase in expectation of workplace flexibility, learning opportunities, and the need for ongoing feedback among younger employees, how does a leader practice leadership? Are there new approaches? This course will provide the information you need to lead and communicate with staff in a multi-generational work environment. (This program is avaiilable in 4 or 8 hour format.)

Objectives: Be able to identify key traits of the generations, especially expectations of feedback, engagement, and style and frequency of communication • Understand key elements of diversity that can strengthen an organization's effectiveness • Develop a cycle of leadership communication that helps individuals and teams succeed and meet expectations • Understand the role of online communication and networking in the workplace

Highlights: Review of the generations and the influences that make the current workforce diverse, talented, and challenging to lead • Developing a personal approach to leadership communication that accommodates individual and generational differences in styles and expectations

Designed for: Professionals who want to develop their leadership skills and be more effective in a multi-generational work environment

Recommended CPE: 8
Prerequisites: None
Event ID: GENSHIFT
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Communications Skills
Author/s: Lin Kroeger, CMC

Leadership and the Blogger

Communication tools keep changing. Which ones are worth working with? What are the benefits and risks? How can you strengthen leadership relationships, and connect to employees and clients more frequently and effectively?

Objectives: Identify communication tools such as BLOGS, Podcasting and WiFi, and its uses, benefits and risks • Assess how to use communication tools to improve employee and client relationships

Highlights: Investigate new communication tools • Practice its use • Develop a strategy for how and when to employ, or avoid the tools

Designed for: Leaders who can benefit from using faster, immediate communication and want to connect to the newest and youngest talent -- the heart of the organization's future success

Recommended CPE: 4
Prerequisites: None
Event ID: LATB
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership from a Slightly Different Perspective new

There are many different skills that an effective leader must posses, such as integrity, vision, and a sense of humor, just to name a few. These leadership skills get transformed into one's style of leadership and those styles vary from Ronald Reagan to Coach Bobby Cox. This program will explore leadership through a different lens by incorporating the principles of improvisational comedy, the power of networking, the diversity of the generations. In addition, we will discuss how to conquer the fear of public speaking and ways to inspire our creativity. (Available in 2 - 4 hour formats)

Objectives: Participants will be able to: • Describe the different leadership skills, traits, and styles • Compare the principles of improvisational comedy to effective leadership • Discuss networking techniques that are essential for effective leadership • Discuss how one can get past the fear of public speaking • Describe way to inspire our creativity

Highlights: The various traits that successful leaders posses • How improvisational comedy, networking, public speaking, generational acceptance, and creativity are essential to all those who lead

Designed for: Those emerging leaders within accounting firms, industry, education, and governmental entities

Recommended CPE: 4
Prerequisites: None
Event ID: LEADDIFF
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Peter Margaritis, CPA, MAcc

Leadership Improv - Why "Fake It Until You Make It" Works

One of the key differences between leadership and management is the creativity that true leaders bring to their jobs. Do you think outside the box? You can learn how - and how to introduce this creativity to your team. This course uses the lessons and spontaneous creativity of improv acting to improve your leadership and business development skills. (This course is also available in a 4-hour format.)

Objectives: Harness the creativity of your team • Build better teamwork and morale • Uncover hidden talent in yourself and in your colleagues • Improve team confidence

Highlights: The Twelve Rules of Effective Improv • "Googling" your mind • Productive brainstorming

Designed for: Anyone who wants to build and lead a more effective, more creative team

Recommended CPE: 8
Prerequisites: None
Event ID: IMPROV
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci

Leadership in Fast-Moving Organizations

Organizations are moving ever-faster, and current and potential leaders must keep up with the pace while continuing to enable followers to keep moving forward. Sometimes, speed creates a change in direction or emphasis, and often, speed creates additional complexity. Regardless of the cause or impact, leaders are responsible for keeping work focused, productive and meaningful.

Objectives: Examine how to use their knowledge, work experience, business and communication toward leading others effectively

Highlights: Identify how to shift perspective and why it is essential • Examine communication skills and processes central to leadership • Assess roles and responsibilities affecting leaders and their constituents • Define how culture, power and the Pygmalion effect shape leadership choices • Assess the impact of team structures on team effectiveness and leadership decisions • Develop a strategy for building constituent relationships

Designed for: Professionals who need to foster team unity to achieve goals

Recommended CPE: 8
Prerequisites: None
Event ID: LFMO
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership in the Midst of Change: What Do I Do Monday Morning?

Attaining and maintaining market leadership requires constant change, and change can be demanding, intimidating and expensive to people and their budgets. Major initiatives require change and staying competitive forces change. People who understand these details are more likely to support that initiative. So after you realize what your goals and strategy are, now it's time to figure out, "What do I do Monday morning"

Objectives: Learn and practice a process to involve people in defining the particular elements of an initiative and then develop an action plan everyone will buy in to

Highlights: Define change, its sources and probable responses to it • Identify elements of successful change initiatives • Describe the signs and implications of resistance • Identify key elements of leadership and communication that integrate change into the daily workflow • Build an ownership plan • Recognize resistance and develop constructive approaches to minimize or eliminate resistance • Use involvement to define action plans and gain buy-in

Designed for: Professionals who define and/or lead projects that require change in work patterns, work relationships or work processes; Organizations that need practical approaches to planning and implementing major initiatives

Recommended CPE: 8
Prerequisites: None
Event ID: IVAC
Course Level: Update
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership in the New Normal new

This full day session is designed to engage participants in exploring the changing definition of leadership, the strength assets they bring to the proverbial table, leveraging the recent evidence-based findings in the science of well-being in the workplace, and the art of facilitating conversations that change the trajectory of ideas. It is designed to provide new information and an opportunity for participants to apply that information in the contexts of their everyday lives so that we go beyond theory and into practice. (This program is available in 8 and 16 hour formats)

Objectives: The participant will: • Create a shared definition of leadership and recognize how that definition has changed over time. • Identify and apply your strengths in your leadership • Understand the value of positive interactions and work environments • Learn the secrets to facilitating productive conversations • Practice the art of asking powerful questions • Apply learnings to real-life scenarios

Highlights: Interactive session design that includes new theory, integration and application components.
• Integrates the recent evidence-based learning from the science of well-being and strength-based leadership.
• Addresses the complexities of the multi-generational work environment.
• Most importantly creates a cadre of leaders who understand how to lead within a networked environment rather than a hierarchical one

Designed for: All who are leaders within thier organiizations or aspire to be leaders

Recommended CPE: 8
Prerequisites: The ability to embracte strategic thinking and future-minded flexibility
Event ID: LNN
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development Strategic Management
Author/s: Gretchen Pisano

Leadership Inside Out: Discovering the Leader Within

Leadership begins within. Effective leaders understand their own personalities and the leadership styles that work best with them. They have a personal mission and a vision that functions like a compass, guiding the choices they make. Great leaders know how to earn the trust of their peers and subordinates, and how to use that trust to meet the challenges their teams face. This course is designed to help develop this vital leadership foundation for yourself. (This course is also available in a 4-hour format.)

Objectives: Understand your personal foundation for leadership • Learn ways to apply it to improve the way you do your job • Learn approaches to developing direct reports

Highlights: Develop a personal mission and use it to guide your life • Explore internal drivers of outstanding leadership • Learn the characteristics of "Level Five" leadership vs. management • Build trust in your direct reports

Designed for: Anyone who is in a leadership position or aspires to be

Recommended CPE: 8
Prerequisites: Management expererience
Event ID: LIO
Course Level: Advanced
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci

Course Listing

Leadership: Alignment and Accountability

A successful organization's strategy, vision, values, work plans, evaluation process and rewards should be aligned so every individual and group in the organization is fully accountable for the work to be done. This program offers leaders a focused approach to aligning the organization's strategy and structure, and outlining the process of creating and maintaining accountability. Leaders with focus are engaged with work teams, stay in tune with clients and customers, and encourage the sharing of both good and bad news. They communicate effectively and frequently, and they demonstrate consistently that they are going somewhere exciting with the organization and that getting on board is demanding and also enjoyable.

Objectives: Alignment of strategy from values to skills sets and project plans • Establishing and maintaining accountability • Ensure alignment and accountability • Measures of performance in the process of aligning and establishing accountability

Highlights: A definition of accountability that defines the roles of the leader and the followers • Develop the leadership and performance capacity of others in the organization • Review of simple activities that can be conducted to clarify roles and responsibilities

Designed for: Individuals in managerial and leadership roles who want their teams working in alignment with the organization's strategy and resources

Recommended CPE: 8
Prerequisites: Management experience
Event ID: LFAA
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership: Coaching to Develop and Empower - Accountability, Delegation and Dialogue

Leaders enable people to fulfill assignments by clarifying expectations, and ensuring they have resources and the competency to fulfill them. Accountability is the agreement. Delegation and dialogue are two primary tools that leaders use to establish accountability and empower people to follow through on their commitments.

Objectives: Define accountability and empowerment • Use dialogue to clarify expectations • Define four levels of delegation that enable individuals to meet expectations

Highlights: Practice dialogue to negotiate accountability • Define the difference between assigning outcomes and agreeing to accountability • Develop leadership skill in developing people through accountability discussions

Designed for: Leaders of individuals or teams

Recommended CPE: 4
Prerequisites: Management experience
Event ID: LCDE
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership: Communicating the Vision; Aligning the Values

Despite the effort spent on defining the vision and values of an organization, most people don't live the vision and values. Leaders must effectively communicate and model the vision and values, but how? This program will provide an opportunity for leaders to develop a strategy for communicating these two essential elements for their organization, using stories, dialogue and strategic communication.

Objectives: Write two stories that exemplify the organization's vision and values • Practice dialogue techniques that make the vision and values real and immediate • Develop an approach to strategic communication that makes the vision and values central to the work of the organization

Highlights: Create and practice examples that show what matters to your organization • Identify the values most easily strengthened that can increase the productivity of the organization

Designed for: Leaders who recognize that when everyone shares the same values and goals, the organization can move forward successfully

Recommended CPE: 4
Prerequisites: Management experience
Event ID: LCV
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership: Execution and Greatness - Great Ideas That Work

Leadership requires ongoing personal development. In fact, recently released research by Jim Collins, "Good to Great, Built to Last" and Marcus Buckingham, "First, Break All the Rules," suggests that traditional goals for development are not necessarily on target. Each author has recently introduced to the market research-based conclusions suggesting alternative choices real people can make to exercise effective and ultimately, high performing leadership. If the definition of a leader is someone who is being followed, what are you doing today that makes it appealing for someone to follow you? If people perform best under certain predictable conditions, are you ensuring those conditions exist?

Objectives: Translate Collins' and Buckingham's research into practical, effective, day-to-day leadership choices

Highlights: Learn the implications of "Good to Great" conclusions • Review talent issues highlighted in "First, Break All the Rules" • Review a practical model for building and improving team dynamics • Define a team building process that minimizes chances for team failure • Build a picture of personal performance as a high performing leader • Plan the path to high performing leadership

Designed for: Individuals and teams who want to establish and/or develop leadership capabilities by focusing on effective behavior and communication

Recommended CPE: 8
Prerequisites: Management experience
Event ID: MCWP
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership: Motivation -- The Power of Needs, Styles and Ownership

It is necessary for leaders to understand what people need and expect so they can ensure those needs are met – then work on helping them meet their own expectations. When we meet our needs, we are able to work harder and more productively. When we are allowed to work toward meeting our expectations, we can become stronger performers. This program is also available in a 4-hour format.

Objectives: Define needs and expectations • Understand how motivation works and what makes people respond to leaders • Develop strategies that allow people to own their work • Review how personal style affects leader-led relationships

Highlights: How needs interfere with personal motivation • Why motivation must be personal and what leaders can do to encourage self-motivation • Accepting the reality of nonself-starters and achieving good performance

Designed for: Leaders of teams and projects

Recommended CPE: 8
Prerequisites: Management experience
Event ID: LMPN
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership: Personal Style and Personal Effectiveness

Leaders need to know who they are and what strengths they have in order to be effective. Participants will use three assessments to better understand themselves and others, identifying ways to self-motivate and help motivate those around them – a key skill for leaders of teams and organizations. Participants will self-assess using three profiles: the McClelland Social Work Motives; the InQ, or InQuiry; and the Myers Briggs Type Indicator (MBTI). They will develop a broad picture of needs, information processing strengths and preferences when gathering information and making decisions. This information allows a leader to encourage diversity of thought and style.

Objectives: Identify varying personal style preferences • Identify social motives and its affect on work style and effectiveness • Identify personally preferred thinking styles and the impact on personal flexibility, leadership, teamwork and decision making • Design a plan to build on personal strengths and integrate self-management of weaknesses into leadership and team work

Highlights: InQ, Social Motives and MBTI assessments • Identification of personal preferences for gathering information and making decisions • Building relationships and teams that build on strengths

Designed for: Professionals with a desire to assess personal strengths, evaluate implications and build a practical action plan for leadership effectiveness

Recommended CPE: 8
Prerequisites: Management experience
Event ID: PSPE
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leadership: Power and Influence

Leaders use power and influence to make things happen, but power is no longer the result of a strong, charismatic personality. Power is the result of relationships established and maintained over time, with obligations understood and accepted. This program enables participants to understand the sources of power and ways to employ them to be productive. This program is also available in a 4-hour format.

Objectives: Explain the sources of power and prioritize them by long-term effectiveness • Practice using influence to build coalitions • Develop strategies for establishing and maintaining power

Highlights: How the generations perceive power • Why power benefits from self confidence and an honest view of ourselves • The dangers of power as force

Designed for: Leaders of teams and projects

Recommended CPE: 8
Prerequisites: Management experience
Event ID: LPAI
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leading and Managing: More and Less Than You Think

As the market deteriorated, great minds continued to try and identify what could make a difference, and what could lead to failure. Jim Collins, of Good to Great, is publishing his next book and his think tank has identified key patterns of what can lead a great company on a downward spiral. Charles Jacobs has analyzed the rational approach to feedback and management, and has found the rational fails us. So what have these two found, and what can an organization do with the information This course will take a look at these theories and help participants identify action steps organizations, leaders, and managers can take to find success.

Objectives: Identify action steps organizations, leaders, and managers can take to increase effectiveness • Understand how Collins and Jacobs observations can help lead organizations toward a culture that integrates the generations more constructively, producing better results

Highlights: Review findings from Jim Collins How the Mighty Fall • Review findings from Charles Jacobs Management Rewired: Why Feedback Doesnt Work and Other Surprising Lessons from the Latest Brain Science • Why does feedback rarely succeed • The problem between rational analysis and success • Why does relying on best practices often produce a poor approach • The availability and immediacy of information and thoughts affecting the workplace

Designed for: Managers and leaders who are in charge of a team, division, or organization

Recommended CPE: 8
Prerequisites: Experience managing / leading people
Event ID: MLT
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leading Change: Action Planning to Actual Implementation

New initiatives, new projects and ongoing business challenges resulting in change can be intimidating; yet, until the world named “change management” as a challenge, most of us worked in changing environments effectively. Today, there is far greater sensitivity to change and its impact on the individual. There is also the assumption that everyone hates and resists change.

Objectives: Focus on change and manage it, so resistance is minimal and the organization can continue to evolve toward successful results

Highlights: Recognize the critical elements and impact of clarity and involvement; change cycles; communication strategy and timing • Understand trust and leadership: Why some people can choose to change • Learn to pace and structure change • Review the 18-month cycle of tolerance

Designed for: Leaders and managers who recognize the centrality of change in their organizations and would rather be in charge of it than running behind to catch up

Recommended CPE: 8
Prerequisites: None
Event ID: APAI
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

Leading, Mentoring and Team Building

Success requires everyone in the organization to be leaders, mentors and team builders. This course will emphasize how to achieve greatness and success in challenging times. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Learn the techniques and tools that make great leaders great, and which will allow participants to grow professionally and enhance their technical skills

Highlights: Leadership principles • Leadership traits • Mentoring effectively • Team building

Designed for: Managers and staff

Recommended CPE: 4
Prerequisites: None
Event ID: LMTB-4
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Frank Ryan, CPA, MBA

Lean Accounting for the Lean Enterprise

As customers demand shorter lead times at lower prices, companies participating within a value stream are under pressure to reduce their lead times, while simultaneously reducing prices and improving economic value added (EVA) and customer service. Companies that fail to effectively implement the Lean Business System or another holistic business model risk becoming uncompetitive. Accounting methods that support Lean prove that continuous improvement projects yield the results that create a competitive advantage.

Objectives: Understand what you can do to report your financials in a manner that provides evidence that Lean projects are providing value and competitive advantage for your company

Highlights: Learn how Accounting for Lean applies to production activities • How Lean Accounting applies to office activities • Benefits of identifying and elimimatiing wasteful transactions • Why value-stream costing is more accurate than standard costing • Importance of Lean performance metrics • How a successful Lean implementation can punish the P & L • Implementaion recommendations

Designed for: All financial professionals

Recommended CPE: 14
Prerequisites: None
Event ID: LEAN
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management Performance Management
Author/s: Jerry Solomon

Lean and Human Resources (HR)

Lean principles and practices revolve around the notion of eliminating waste. Lean has been adopted by operations in manufacturing, healthcare and other industries over the past decade and is now rapidly moving into the office support functions. This course demonstrates how to apply lean principles to dramatically raise productivity in internal Human Resources processes, while also demonstrating how HR can provide lean-based support to help supercharge the enterprise's lean journey. Learn from a recognized industry leader with hands-on experience in this important field. (also available in 2 or 4 hour format depending upon length of session)

Objectives: Be able to distinguish between value-add and non-value add activities • Know how to identify areas of waste and opportunities for waste reduction • Be able to apply lean tools and techniques to HR activities. In addition, they will be able to plan for kaizen events in the HR function as well as provide flexibility and support to the enterprise's lean efforts

Highlights: Basic introduction to lean • Lean for HR vs. HR for Lean • HR waste nightmares and case studies • Lean simulation • Launching Lean HR • Lean tools and techniques

Designed for: Human resource management, human resource specialists, generalists, recruiters, benefits experts, business partners and executives, as well as lean leaders

Recommended CPE: 8
Prerequisites: None
Event ID: LHR
Course Level: Basic
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Business Management
Author/s: Jean Cunningham

Lean Management in a Lean Economy

In today's competitive market place, the need to satisfy the customer at the least cost has never been greater. Competitive demands require companies to operate lean. This course will help you to understand what lean truly means in order to develop a long term lean strategy that enhances your organizations ability to thrive. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Lean concepts • Customer value and the product concept • Target costing • Value stream analysis • Product and service flow • Customer pull and demand analysis • Achieving perfection• Lean implementation

Highlights: Review the five principles of lean systems: Value, value stream, flow, pull, perfection in the process

Designed for: CFOs, senior management and controllers

Recommended CPE: 8
Prerequisites: Management experience
Event ID: LMLE
Course Level: Intermediate
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management Performance Management
Author/s: Frank Ryan, CPA, MBA

Learn to Communicate in Way that Others Can Easily Grasp new

Making conversation visible has been a powerful tool throughout time, whether we were drawing on the walls of a prehistoric cave or the back of a napkin. However, we still haven't mastered this technique and continue to overwhelm our clients and colleagues with endless data that cannot be quickly synthesized or integrated. Taught by two professional graphic facilitators with 30 years of corporate experience, this workshop is designed to give you the tools and techniques, as well as the hands-on practice, to create simple, powerful visuals that translate data to information and display it in a way that it can be intuitively read and, most importantly, remembered

Objectives: Participants will be able to communicate their messages far more effectively and lead meetings that are engaging and memorable.

Highlights: The basic techniques of color, layout, icons and metaphors • Approaching a page (or a slide) to make it work for you and your audience • Flipcharts that make a point • Setting the stage for a great meeting

Designed for: All who want to learn to communicate more effectively

Recommended CPE: 8
Prerequisites: None
Event ID: GRASP
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Gretchen Pisano

Lions, and Tigers, and Numbers Oh My! Finance for the Non-Financial Manager new

Numbers don't have to be a nightmare anymore and you don't need to be an accountant to understand them! Master the basics of the language behind the primary financial reports. Through the use of case studies, learn how to read each of the financial statements - the balance sheet, income statement, and the statement of cash flows. Then learn to read between the numbers to analyze performance. Spot both short and long-term trends that can be used to improve overall business performance.

Objectives: Translate accounting terms into understandable concepts • Learn what information is contained in the balance sheet, income statement, and statement of cash flows • Develop and sharpen critical thinking abilities and analytical skills to assess the performance of organizations

Highlights: Identify what accounting information is useful for decision-making • Interpret and analyze financial statements. • Prepare comprehensive financial analysis • Perform multi-year ratio analysis

Designed for: Managers and decision-makers without a financial background

Recommended CPE: 8
Prerequisites: None
Event ID: LIONS
Course Level: Basic
Format/s: Group Live
Field of Study: Finance
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Listing For Leaders: Ask the Question, Discover the Need, Win the Trust

There is no more powerful skill in building enduring and profitable relationships -- with clients, members of your firm and others in your life -- than listening. Yet listening is incredibly difficult, even if you are trying hard. This course teaches tips and tricks for mastering this most difficult and rewarding skill. (This course is also available in a 4-hour format.)

Objectives: Help participants understand why it is so difficult to listen and outline skills to enhance professional and personal relationships by increasing listening performance • Become a more effective leader, team member and opportunity developer • Learn how to probe for a client's or colleague's real needs so you can add value more effectively and build stronger relationships • Develop skills in resolving objections and overcoming resistance

Highlights: Why is it so hard to listen • What should you be listening for • Asking the right question the right way • Dos and don'ts for effective listening • Using listening skills to build business and professional relationships • Resolving objections and overcoming resistance

Designed for: Anyone who has the need to build relationships, especially anyone in a firm with a leadership role, works in a sales or marketing position, or spends a significant amount of time with clients

Recommended CPE: 8
Prerequisites: None
Event ID: LISTEN
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Communications Skills
Author/s: Greg Conderacci

Listening to Build Trust

According to Carl Rogers, "Man's inability to communicate is a result of his failure to listen effectively." To lead and persuade others, one must gain the trust of others. Trust isn't something you can bestow on yourself, it must be earned. This course explores how to listen and ask questions that help leaders build trust.

Objectives: Understand the difference between listening for needs vs. wants • Recognize the two most common mistakes we make when listening • Review the difference between listening diagnostically vs. listening with curiosity • Understand the "triggers" missed by most listeners that could lead to improved communication • Learn how to question to build trust

Highlights: Interactive role plays • Listening exercises and fun caselets • Listening empathetically in an effort to build trust, and in turn, get results

Designed for: Anyone who interacts with associates in a relationship context; those with an interdependent relationship with others in their organization with a need to influence others

Recommended CPE: 1
Prerequisites: None
Event ID: LBT
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Mark Slatin

Living Life at Performance Level (keynote) new

Curtis Zimmerman gives a dynamic, experiential program which hands participants the tools to ignite their ultimate potential. Audiences learn to juggle, play "Simon Says" and other activities not just for fun but to absorb the concepts of Creating a life of relevance and accountability, taking risks, Making character-driven decisions, choosing positive influences, being a leader, being responsible, being authentic, and being a catalyst for change.

Objectives: This program will empower individuals to transform their way of thinking, be accountable, increase awareness of themselves and others, be more productive, understand the value of collaboration and teamwork as well as be entertained and educated

Highlights: Juggling • Interactive activities

Designed for: Anyone who is looking to improve the quality of their work and their attitude towards work as well as in their personal lives

Recommended CPE: 4
Prerequisites: None
Event ID: LIVELIFE
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Curtis Zimmerman

Course Listing

MacGyvering: The Art of Being Resourceful in a Crisis

Angus MacGyver, the TV secret agent of the late 80s and early 90s, somehow always managed to extricate himself from crises using only his trusty Swiss Army Knife, duct tape, paper clips and his wits. "MacGyvering" involves applying the very useful approach of this mythical hero. In today's "do-more-with-less" business environment, he is the model for the resourcefulness firms and clients often demand from CPAs. Taught by a Johns Hopkins University Carey Business School adjunct faculty member with more than 30 years of experience in communication, marketing and resourcefulness, this highly interactive course will utilize many creative exercises and give you the tools to be more resourceful in difficult situations. (Available in 4 or 8 hour format)

Objectives: Develop a belief that no problem is unsolvable, no matter how dire it seems • Keep a cool head - and use it to understand clearly what is happening • Boost creativity • Tap often-unnoticed and unexpected resources • Learn to fix it - fast

Highlights: The MacGyver approach to resourcefulness: Exploiting untapped resources in innovative ways • Battlefield awareness: Discovering and using patterns • Reflex testing: What are the formulas that blind us and slow us down and where is the hidden friction and waste • Swiss Army Knives: What are our key tools and how do we use them • Fear and Killer ANTs: Keeping, and using, a cool head in a crisis

Designed for: Leaders and others who want to use resourcefulness to gain a competitive edge

Recommended CPE: 8
Prerequisites: Management experience
Event ID: MAGYV
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Personal Development
BLI Curriculum: Strategic Management
Author/s: Greg Conderacci

Maintaining a Professional Image in a Business Casual World

Take control of the impression you make on others! Everything you do and say creates an impression that others have of you and the company for which you work. Learn how casual dress is not the same as "Saturday Casual." Understand how to present a professional image including dress and demeanor to command respect in the business environment. This course is available in a minimum one hour format.

Objectives: Teach employees the importance of first impressions, particularly as it relates to dress, image and non-verbal communication • Help individuals to focus on the type of image that is appropriate for themselves and the company for which they work and teach them how they can create this image

Highlights: Body language • Professional attire • Industry attire expectations • Business casual versus recreational casual dress • Voice, grooming

Designed for: Financial Professionals

Recommended CPE: 0
Prerequisites: None
Event ID: MPI
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Cathleen Hanson, Carol Haislip

Make it Happen! The Art of Discipline and Getting Things Done

Professionals sometimes struggle to achieve professional goals. Often, we are so busy juggling conflicting priorities and tasks that well-intentioned objectives stay indefinitely on our to-do lists or only half-heartedly get accomplished. This session helps you find the discipline to ensure that they make the things that are important happen.

Objectives: Upon completion of this course, participants will be able to: • More successfully achieve firm strategies, client service goals and engagement-specific objectives • Discuss proven tips for better project and engagement management • Explain how leading by example and positively influence others, including your peers

Highlights: Analyze case studies of real-life companies that have succeeded by focusing on the disciplines of setting and achieving goals • Use accountability as an effective motivational tool • Self-assess the productivity and efficiency of what you are currently doing and create an action plan to get things done • Learn techniques to help overcome hurdles to achieving goals and objectives

Designed for: Anyone who needs to learn the discipline to make their professional goals a reality

Recommended CPE: 4
Prerequisites: None
Event ID: MIH
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Jennifer Louis, CPA

Make it Happen! The Art of Discipline and Getting Things Done (webcast) new

Professionals sometimes struggle with achieving professional and organizational goals. Often, we are so busy juggling conflicting priorities and tasks that well-intentioned objectives stay indefinitely on our open item lists, or only half-heartedly get accomplished. Successful organizations find the discipline to ensure that they make the important things happen.

Objectives: Upon completion of this course, participants will be able to describe the discipline concepts necessary to successfully achieve firm strategies, client service goals, and engagement-specific objectives.

Highlights: Learn proven tips for better project and engagement management • Analyze tips for focusing on the disciplines of setting and achieving goals • Learn how to lead by example and positively influence others, including your peers • Discover how to use accountability as an effective motivational tool

Designed for: Anyone who needs to learn the discipline to make your professional and organizational goals a reality.

Recommended CPE: 2
Prerequisites: None
Event ID: MIH-W
Course Level: Basic
Format/s: Webcast - 2 hour
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Jennifer Louis, CPA

Making Rain: Strategies for Client Service, Selling and Negotiating

Rainmaker – the Bloomberg Financial Glossary defines a rainmaker as a valuable employee, manager or subcontracted person who brings new business to a company. The success of any firm relies heavily on the ability of its professionals to retain and expand services to an existing client service base, while building a tremendous referral network to attract quality new clients. This course will help you obtain the skills necessary to attract and retain quality clients for your firm.

Objectives: Upon completion of this course, participants will be able to explain the critical success factors and skills necessary to attract and retain quality clients for their firm.

Highlights: Master best practices for building loyalty within existing client relationships • Analyze how proven selling techniques apply to the professional services firm • Understand your clients' perceptions and buying motives • Learn how to cross-sell services within your existing client base • Identify ways to communicate your firm's marketing advantage • Practice effective negotiating techniques • Discover how to build a more profitable business network with key prospects

Designed for: Anyone interested in maintaining a quality client base

Recommended CPE: 4
Prerequisites: Management experience
Event ID: MRS
Course Level: Intermediate
Format/s: Group Live, Webcast - 2 hour
Field of Study: Marketing
BLI Curriculum: Leadership Development
Communications Skills
Author/s: Jennifer Louis, CPA

Managing Multiple Generations: Next Steps and New Surprises (Available as a keynote) new

Simply put, much of what you think you know about the newest generation in the workforce is out of date. In this fast-paced update, Karl Ahlrichs will share some new and quite surprising information about the latest crop of employees that are arriving in our organizations, and impart his insight on generational challenges that may be causing problems. (Available as a keynote presentation.)

Objectives: Get "real world" experiences and direct advice on measuring and leveraging your biggest off balance sheet asset: people

Highlights: Three core values that all generations rate as the "top 3" • The impact of video games and how it has forced us to redesign what we call work • Generation gaps make it hard to get things done at work • A majority Gen-Xers feel their generation is viewed negatively • Money isn't a motivator: Millennials believe a flexible workplace and opportunity for promotion are more important than salary

Designed for: All

Recommended CPE: 2
Prerequisites: None
Event ID: MMG
Course Level: Basic
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Business Management
Author/s: Karl Ahlrichs, SPHR

Managing Performance to Implement Strategy

This course involves giving and receiving feedback about performance, writing and communicating constructive performance appraisals, and planning education and development.

Objectives: Increase knowledge and skill in performance management • Identify and define core competencies that link to the business strategy • Share expectations so individuals can do the work needed to meet business goals • Manage talented people so they effectively implement strategies • Manage so your staff performs more effectively with clear expectations and the competencies to meet those expectations • Recognize staff success • Get people to do what's needed, when it's needed, the way it's needed • Provide focus, support their work and help them meet your needs, while ensuring the strategy is implemented and the projects completed • Learn what skills and competencies will move your company forward • Identify the areas of talent needed to implement the strategy

Highlights: Assess which core competencies are needed to grow your business • Establish objective standards of excellence • Discover how to link those standards throughout the company • Effectively communicate key strategies to implement performance management • Integrate standards of excellence for performance into the culture of the company • Provide support for implementing company strategies • Learn to tie talent to performance, and performance to results

Designed for: Executives and managers who desire to increase knowledge and skills in performance management

Recommended CPE: 8
Prerequisites: Management experience
Event ID: PMIFC
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Performance Management
Author/s: Lin Kroeger, CMC

Managing Strategic Business Partners

A growing number of organizations report that as much as 80% of their core business processes are now handled through various types of strategic or outsourced business partners. Managing these relationships successfully and profitably requires a unique approach - one that creates win-win-win outcomes for the organization, the business partner, and the customer. This program will show you how to develop and build strong, strategic business partnerships by establishing best practice options. It is particularly well-suited as a Customized Training Solution session between business partners.

Objectives: Define the best practices for creating and developing business partner relationships • Determine criteria for evaluating a critical relationship • Develop a plan for improving and broadening the partnership

Highlights: The differences between partner and customer-supplier relationships • Business/operational vs. relationship/cultural requirements • Business partner selection criteria and process • Developing a relationship management strategy • Techniques for getting buy-in and commitment

Designed for: Executives and their leadership teams; project managers; supply chain management; corporate staff groups; relationship managers for strategic suppliers and outsourcers

Recommended CPE: 2
Prerequisites: Professional management experience
Event ID: MSBP
Course Level: Intermediate
Format/s: Webcast - 2 hour
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management Strategic Management
Author/s: Alan Patterson

Maryland CPA Ethics Training

This course, taught by Don Paris, CPA, is a four-hour program that satisfies the Maryland State Board of Public Accountancy's ethics requirements. It covers ethics of the profession, specifically the Rules of Professional Conduct.

Objectives: Comply with State Board of Accountancy requirements for topics dealing directly with professional ethics and conduct • understand rules of professional conduct

Highlights: State Board of Accountancy latest pronouncements

Designed for: all licensed CPAs in Practice, Industry, Education and Government

Recommended CPE: 4
Prerequisites: None
Event ID: MCE
Course Level: Basic
Format/s: Group Live
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Donald Paris, CPA, MST

Measure What Matters to Customers: Using Key Predictive Indicators

Do your firm's internal measurements give you a competitive advantage in the marketplace? Do they judge the success of your company the same way your customers do? Are there leading indicators that have predictive ability and correlate with value as defined by your customers? If you get what you measure, what exactly do your internal metrics get you?

Objectives: Learn how to capitalize on Key Predictive Indicators (KPIs), the innovative measures that define the success of your company • Increase your company's profits by working smarter • Learn why the most important activities that actually matter in your business are those that impact your customers

Highlights: Working in an intellectual capital economy, not an industrial or service economy, and why that difference is critical • Why the traditional metrics of efficiency, which are over a century old, are no longer relevant to measuring the effectiveness of intellectual capital • The perils of pantometry: counting for the sake of counting • The difference between a Key Performance Indicator and a Key Predictive Indicator • How to combine a theory with a measurement for maximum value creation • Developing Key Predictive Indicators for your firm • Human capital, not cattle • Managing by results versus managing by means • The seven moral hazards of measurements

Designed for: Any professional interested in being among the leaders in the profession, moving away from the old paradigm of operating a professional service firm and embracing the critical success factors of the knowledge economy

Recommended CPE: 8
Prerequisites: Management experience
Event ID: MWMTC
Course Level: Intermediate
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Communications Skills
Author/s: Ronald Baker, CPA

Measurement of Major Assets and Impairment new

Get an in-depth review of the IFRS standards related to major assets and impairment reporting including: IAS 2 - Inventory Measurement, IAS 16 - Property, Plant & Equipment, IAS 17 - Leased Assets, IAS 38 - Intangibles, and IAS 36 - Impairment of Assets.

Objectives: Analyze the various methods IFRS allows for the measurement of assets • Discuss the revaluation surplus account and what types of transactions effect its balance • Determine when assets can be written-up or written-down and the effects that these transactions have on the IFRS financial statements • Explain the concept of "substance over form" in its relationship to leased assets • Analyze whether a leased asset should be treated as a finance lease or an operating lease • Discuss current developments in the IASB/FASB joint leased project • Demonstrate an understanding of the key principles concerning the depreciation of PPE • Determine when it is appropriate to capitalize internally generated intangible assets • Examine the steps to determine if an asset (PPE, inventory, and intangible) has been impaired

Highlights: Inventory measurement • Property, Plant, and Equipment measurement • Revaluation Model v. Cost Model • Component depreciation • Leased Asset measurement • Finance lease v. operating lease • IASB/FASB joint project on leases • Intangibles measurement • Development costs • Goodwill • Impairment of assets • Recoverable amount Value in use

Designed for: Accountants, users, & preparers of financial statements

Recommended CPE: 4
Prerequisites: Knowledge of basic accounting for assets
Event ID: IFRSASET
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Strategic Management
Author/s: Peter Margaritis, CPA, MAcc

Meetings Made Easy (and Effective)

This course will give you the tools you need to conduct meetings efficiently and effectively. You will hear techniques for handling meetings with CPA and non-CPA attendees, learn tips for keeping participants attention, and get information on the newer forms of meetings, like webcasts and tele-conferences.

Objectives: Understand how to organize meetings for efficient flow of information • Be able to organize your thoughts and write your portion of a presentation • Gain tips for appearing confident when you lead a meeting • Learn ways to keep participants attention • Know how to deal with difficult participants • Become knowledgeable on the newer forms of meetings: teleconferences, tele-seminars, webinars, webcasts, etc. and understand the special rules that govern them

Highlights: Techniques for handling meetings with CPA and non-CPA attendees • Organize meetings for efficient flow of information • Tips for appearing confident when you lead a meeting • Appearing credible and professional when you speak • Tips for keeping participants attention • The importance of getting everyone involved and methods to ensure participation • The best tool for keeping meetings on-track • Special techniques for handling brainstorming meetings effectively • How to deal with difficult participants • Newer forms of meetings: tele-conferences, tele-seminars, webinars, webcasts, etc. and the special rules that govern them

Designed for: Managers, Sr. Managers, Department Heads, Assistant Controllers or Treasurers

Recommended CPE: 8
Prerequisites: People who lead meetings (internally or externally)
Event ID: MME
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

Message-Based Communication

Communication remains a skill central to personal success. When messages are not clear, there are invariably costs attached to their failure. Worse, the individual who communicates poorly appears less intelligent than the individual who communicates effectively. Communication occurs every time we see other people, read e-mail, send a letter, write a proposal, produce marketing materials and make presentations.

Objectives: Learn to use communication skills carefully to send the right message whether talking with others, sending written material or presenting ideas in informal and formal situations

Highlights: Define a message and its context • Develop a chain of logic focused on a message • Create a document and a presentation using the message-based structure • Analyze information and identifying messages vs. supporting facts • Structure information to support a message • Use message-based communication in interpersonal, written and presentation challenges

Designed for: Professionals who want to improve communications skills to be more effective leaders, especially when sharing complex information and/or persuasive ideas

Recommended CPE: 8
Prerequisites: None
Event ID: MBC
Course Level: Overview
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Microsoft Office 2007 Update and Windows 7 Tips

This course will tell you what you need to know to migrate effortlessly to this new Office version. Special emphasis will be given to the new productivity features in Excel and Word, Power Point, and Outlook as they apply to accountants. Tips for the Windows 7 operating system will also be covered. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Explore themes, features, and business diagramming tools across Office 2007 Excel, Word and Power Point • Utilize new time-saving Power Point features to quickly create new presentations with dynamic graphic elements

Highlights: The new Microsoft Office Ribbon, Quick Access Toolbar, Contextual tabs, and Galleries • The new XML-based file formats • Customizing program defaults • Backwards compatibility with older versions of Excel • Excel's new conditional formatting features and icon sets • Track key performance indicators with new business dashboards • Dynamic Excel charts • Interactivity between Excel and other Microsoft Office programs • The new interface to merge changes by multiple reviewers • Saving a document into the new file formats or earlier file formats • Integrating tasks into the Outlook calendar to manage daily priorities in one place • Calendar overlay feature in Outlook • New tips for managing files, folders, and libraries with Windows 7 • Customize the start menu, taskbar and gadgets • Utilize the Jump list feature for quick access to files • and more

Designed for: CPAs and Professionals at all levels of an organization upgrading to Office 2007 and Windows 7

Recommended CPE: 8
Prerequisites: None
Event ID: OFFIC07L
Course Level: Update
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Microsoft Office 2010 New Features Update with an Emphasis on Excel 2010

This course will focus on new features added in Microsoft Office 2010 to migrate effortlessly to this new version. Special emphasis will be given to the new productivity features in Excel as well as Word, Power Point and Outlook as they apply to accountants. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Explore Excel's enhanced data analysis features including new Pivot Table features and slicers • Use Outlook's new conversation tracking features • Examine new Word features for ease of document creation, manipulation and review

Highlights: Use the Microsoft Office Ribbon, Quick Access Toolbar, Contextual tabs, and Galleries • Backwards compatibility of file formats with earlier versions of Office • Important program defaults • Screen capture tools • Control document meta-data easily for security • New autosave feature • Explore web enabled versions of the Office programs for file collaboration • Excel's conditional formatting features • business dashboards • table feature for quick data analysis • Pivot Table features • Create dynamic Excel charts in fewer steps • sparkline graphics into cells • Explore interactivity between Excel and other Office programs • Outlook Quick Steps feature • Insert videos into a presentation • Convert Power Point presentations to videos • Compress media to reduce file size • and more

Designed for: CPAs and Professionals at all levels of an organization upgrading to Office 2010 and want to learn how to take advantage of new productivity features

Recommended CPE: 8
Prerequisites: None
Event ID: OFFIC10
Course Level: Update
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Microsoft Project 2010 Level 1 new

As one of the best project management software tools, Microsoft Project 2010 provides an intuitive and easier way to successfully complete projects. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Explore the Microsoft Project 2010 Environment *Display an Existing Project Plan in Different Views • Create a Project Plan • Assign a Project Calendar • Add Tasks to a Project Plan • Enter the Task Duration Estimates • Add Resources to a Project Plan • Managing Tasks in a Project Plan • Constraints and Deadlines • Managing Resources in a Project Plan • Create a Resource Calendar • Assign Resources to Tasks • Enter Costs for Resources • Resolve Resource Conflicts • Finalize a Project Plan • Shorten a Project Using the Critical Path • Print a Project Summary Report

Highlights: *Identify the basic features and components of the Microsoft Project environment • Create a new project plan file and enter project information • Manage tasks by organizing tasks and setting task relationships • Manage resources for a project • Finalize a project plan

Designed for: CPAs and Professionals at all levels of an organization who have an understanding of project management concepts, who are responsible for creating and modifying project plans, and who need a tool to manage those project plans

Recommended CPE: 8
Prerequisites: None
Event ID: PROJECT-
Course Level: Basic
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Mingling for Professionals (Mingle, Mingle)

First impressions really do last a lifetime! Participants will learn the art of making a successful entrance and working the room. Focus will be upon initiating a conversation, appropriate topics for small talk and overcoming "mingle-phobia." Participants will learn to create the most effective initial impression through proper handshaking, eye contact, introductions and appropriate nonverbal communication. Finally, where would a successful mingling event be without teaching participants the etiquette of a graceful escape. This program can also include the secrets to successful networking. This program is available in a two-hour format.

Objectives: Help employees feel comfortable walking into business and social situations where mingling is required to make the most of networking opportunities

Highlights: Pre-event planning • Making an entrance • Greeting people • Getting into conversations • Making conversation • Exiting conversations • Post-event follow up

Designed for: Financial Professionals

Recommended CPE: 4
Prerequisites: None
Event ID: MP
Course Level: Overview
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Cathleen Hanson, Carol Haislip

Navigating the New Accounting and Auditing Standards new

Get an update of recent FASB, AICPA and other Professional Standards

Objectives: Upon completion of this course, the participant will have an understanding of the most recently issued technical accounting and auditing standards and how they impact their firm/organization.

Highlights: Review the most recently issued changes to the FASB Accounting Standards Codification • Review AICPA auditing standards • Review AICPA standards for performing and reporting on compilation and review engagements • Examine FASB projects and their current status

Designed for: CPA practitioners who perform audits, reviews and/or compilation engagements; CPAs/accountants in government, not-for-profit organizations, industry or education who desire to keep up-to-date on technical standards

Recommended CPE: 8
Prerequisites: Knowledge of existing GAAP, GAAS and SSARS standards
Event ID: NAVAASTD
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Anthony Cuozzo, CPA, CGFM

Course Listing

Negotiating Risks: A Business Planning Approach

In today's challenging business environment, management professionals cannot simply react to changing conditions. Instead, they must anticipate problems, assess potential impacts, plan responses, and collaborate with colleagues to implement them. This course introduces managers to the functions of business planning and risk management, emphasizing pragmatic approaches to leadership at the personal and organizational levels. (available in formats from 2 to 8 hours)

Objectives: Know how to develop and implement a ten step process of business planning and risk management, including both the technical knowledge required to create a plan and the leadership skills required to institute it

Highlights: The five steps of business planning, including model development, volume analysis, cost structuring, revenue planning, and investment strategy • The five steps of enterprise risk management, including environmental assessment, crisis definition, risk assessment, crisis response, and internal controls • Developing a comprehensive plan • How to present recommendations in an executive context

Designed for: Emerging and mid-level managers who require an introduction to the fields of business planning, risk management, and leadership negotiation techniques

Recommended CPE: 8
Prerequisites: None
Event ID: NRISK
Course Level: Basic
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Michael Kraten, PhD

Networking: Even Accountants Can Mingle

Networking is one of the most powerful tools accountants can develop, but it takes time, energy and commitment in order to build a strong network. Having a strong network will assist you in launching a new idea or plan, developing new business and clients, reducing costs in recruiting, and leveraging your career.

Objectives: Recognize the five influences of catalytic individuals and recognize the various roles that they contribute in their professional network • Know the difference between a clique and an entrepreneurial network • Identify new opportunities in order to create an entrepreneurial network • Be able to analyze personal professional and social networks • Know how to apply the tools from the workshop to increase and strengthen ones professional network

Highlights: Approach every gathering as an opportunity • Listen with your ears and more importantly, with your eyes • Identify who is in your network and your future prospects • Begin thinking about how to develop your entrepreneurial network

Designed for: Accounting, financial, and managerial professionals, at all levels

Recommended CPE: 2
Prerequisites: None
Event ID: NETMING
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Peter Margaritis, CPA, MAcc

New Leader Development

Identifying and supporting new leaders is a critical strategy for emerging organizations. Leadership development - particularly for talented, new leaders - is critical for both retaining and leveraging talent to create a deeper organization. This "New Leader Development" course will teach individuals the skills and techniques for successfully managing performance, motivating and coaching teams, and building on-going relationships. The course unveils how new leaders create accessibility and visibility for their teams, colleagues, and senior management.

Objectives: Learn how to manage your boss • Devise a blueprint for the roles, responsibilities, skills and competencies needed for success in leadership positions • Assess the level of competence against the leadership standards • Develop a plan to improve leadership effectiveness

Highlights: Four leadership roles needed for organizational success • How to increase visibility and credibility in the organization • Building a base of power • Effective influence and persuasion techniques • Developing relationship management strategies • Managing across and up in the organization • Creating a professional development plan

Designed for: First-time managers and newly promoted managers, and those moving into; project managers with cross-functional responsibilities

Recommended CPE: 8
Prerequisites: None
Event ID: NLD
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Alan Patterson

The New Workforce - New Data, New Ideas, Aging Baby Boomers

In the new economy, managers are challenged by an aging workforce that is not retiring anytime soon. They may have planned to have financial and personal independence by now, but the economy has gotten in the way. The challenge now is to motivate and manage a complex workforce, with a core of baby boomers that are grumpy and disaffected. This course will provide managers, supervisors and executives tools for getting higher productivity, customer service and profitability from their existing workforce. It offers knowledge and understanding of the core motivational theories that work on boomers in particular and the modern workforce in general.

Objectives: Obtain tools for getting higher productivity, customer service and profitability from your existing workforce • Knowledge and understanding of the core motivational theories that work

Highlights: Updated review of the interaction of the generations • New data on the common values held by multiple generations that may surprise you • Practical advice on the motivation and management techniques that work in today's economy

Designed for: Departments and individuals that manage mixed generations

Recommended CPE: 4
Prerequisites: Management experience
Event ID: GRUMP
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Business Management
Author/s: Karl Ahlrichs, SPHR

On Good Ground: Creating A Personal Strategy for a Great Life

How great would your life be if you did what you loved to do Imagine spending every day doing what you do best. Each of us has a "good ground" - a fertile niche where the seeds of our efforts grow most productively. Few of us find it. This course helps you design a strategy for getting there. The course is taught by an adjunct faculty member at the Johns Hopkins Business School, with more than 40 years of experience in communication and marketing. He has advised countless individuals at all levels on strategies for career change and success. (also available as a keynote or 4 hours)

Objectives: Change your life for the better by harnessing your talents, creativity, and energy • Repackage yourself for a more productive, rewarding and happier future

Highlights: So, what do you want to do: An easy way to figure that out • Overcoming the fears that are holding you back • Proven approaches to achieving your goals • Managing the folks getting in your way • Mastering inertia and procrastination • Networking your way to your dreams

Designed for: Anyone seeking a simple, clear approach to growing his or her career

Recommended CPE: 8
Prerequisites: An open mind
Event ID: GOODGRN
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Greg Conderacci

Operational Decision Making with Lean Accounting

Companies are working hard to both control cost and improve productivity. But many are floundering to find the best information to help make the right decisions and to assess the impact of those decisions. Often the decisions are based on traditional financial reporting, and when the results are different than expected, they are surprised or even worse, out of business. This workshop shows how the adoption of Accounting for Lean improves decision making. During the workshop, specific examples are discussed showing how to identify the value streams / product lines and the most relevant information. By attending this workshop, you'll also explore how to conserve cash by taking specific actions that might not be obvious from traditional standard cost information (also available in 2 or 4 hour format but would be scaled back)

Objectives: Importance of using proper information for variety of important decisions • Examples of different types of decisions and appropriate information • Lean Accounting statements easier to utilize than traditional standard cost statements • Examples of lean statements

Highlights: Lean impact on financial statements • Profitability reporting without standard cost accounting • Decision-making (in-sourcing; out-sourcing; target areas and progress; constraints; pricing) • Measures and metrics • Conserving cash • Launching lean accounting

Designed for: CEO, CFO, COO, controllers, cost managers, financial analysts, operations leaders

Recommended CPE: 8
Prerequisites: None
Event ID: ODM
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jean Cunningham

Course Listing

Organizational Productivity - Practical Strategies for Getting and Staying Organized

It's happened to most of us. We organize our desk on a Monday only to find that it is disorganized by Wednesday. What would happen to productivity and performance if employees could get organized and stay that way? How much more control would they have over their day?

Objectives: Learn the secrets behind organization and space management that lead to a more creative and stress-free work environment

Highlights: A two-step process for getting and staying organized • The two keys behind paper and e-mail organization • Two critical pieces for any successful organizational system • The main reason most paper systems fail • Set up an effective email filing system • Best times - and worst times - to check email and voice mail messages • A step-by-step process for setting up a filing system for handling paper later • Two criteria for deciding whether to handle paper now or later • Four powerful steps to de-clutter even the messiest work environment • Two questions that decide the fate of all incoming paper • Three main causes behind almost all disorganization • Create space when there doesn't seem to be enough • How a simple survey can reduce organization time and frustration • How the "general to specific" rule will finally get your files organized

Designed for: All levels within an organization based on client needs

Recommended CPE: 8
Prerequisites: None
Event ID: GSO
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Outlook 2010 Update and Best Practices for CPAs

This course emphasizes features that will enhance productivity for tracking and managing client contact information, locating documents, searching, sharing team calendars and archiving client information. Interactivity with Excel and Word will also be covered. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Learn interaction between Outlook, Word and Excel

Highlights: Create and manage subfolders and favorites • email options and rules • Set up accounts to receive email from multiple internet accounts • Set "Out of Office" replies and rules • archive folders • Use color features to automatically prioritize in email, contacts, or tasks • Setup the new search folders to filter email based on rules • Instant Search • contact forms • Share calendars and schedules • Set permissions • Set desktop alerts • Add hyperlinks • Send email and attach documents directly from Word • Send spreadsheets or ranges of a spreadsheet directly from Excel • Schedule meetings and tally responses • Use time-saving keyboard shortcuts for reading email • Arrange email by conversation or use the new features to track client conversations • View multiple Outlook folders at the same time • Use the Journal with the Contact form to document telephone conversations • Use time-saving ribbon tools • Understand cached exchange mode • Learn guidelines to tame your Inbox

Designed for: CPAs and Professionals at all levels of an organization needing to enhance and update skills to take advantage of the new productivity features in Outlook that apply to client contact management

Recommended CPE: 8
Prerequisites: Basic knowledge of MS Outlook
Event ID: OUTLK-L
Course Level: Update
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Overcoming Procrastination - Bridging the Gap Between Your Goals and Reality

The link between employees' level of personal stress and satisfaction and their workplace performance is well documented. Given this reality, how many of your employees would like to strengthen the quality of life? If you could help them take the quality and satisfaction up a notch, what impact would this have on their morale and productivity? In this practical course, participants will learn how to find the time, develop a road map and generate the energy to make three key changes in their lives - changes that will make things easier and lead to a greater sense of personal satisfaction

Objectives: Learn how to find the time, develop a road map and generate the energy to make three key changes • Discover how to use two practical tools for managing procrastination • Review how to overcome obstacles to stay on track

Highlights: Use a four-step process to identify three key changes • Complete an obstacle analysis to understand what can get in their way • Put the emphasis on actually implementing the plan - and not just in the planning of it • Learn how to find the time and energy to really make it happen

Designed for: All levels

Recommended CPE: 8
Prerequisites: None
Event ID: PSPA
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development Communications Skills
Author/s: Ray Perry

Performance, Productivity and Profit: Creating the Higher Energy Organization

Time management is sooo 20th century. You can't get any more hours in the day - but you can get more energy for yourself - and infuse your organization with it. These days, it's personal energy management that makes the difference in performance, productivity and profit. Athletes, entertainers, astronauts, trial attorneys and the military train constantly to be physically and mentally ready to perform as a peak energy team over short periods of time - a game, a show, a flight, a trial or an engagement. Yet in business, professionals attempt to perform at high levels over many weeks and months, often without much of a break. As a result, they experience performance-sapping low morale, burnout and turnover. This course will show you how to change your outlook and approach by tapping secrets and strategies from sports, science, psychology, literature and even history.

Objectives: Be able to harness and focus your energy and your organization's for peak performance when it matters • Understand "energy sinks" that can sap your organization's strength when you need it most and learn how to avoid them • Develop strategies to improve your firm and the health and careers of every one in it

Highlights: Learning to manage your energy effectively • Developing the ability to identify where your firm's energy is being spent-and lost • Understanding the different types of energy and what they can do for you • Knowing why your people are tired and what to do about it • Balancing the mental game and the physical game • Training for the kind of energy you need most.

Designed for: All

Recommended CPE: 8
Prerequisites: None
Event ID: HEO
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Business Management
Author/s: Greg Conderacci

Performing Research Using the Codification new

The Financial Accounting Standards Board completed its codification project in July 2009 with the goal of streamlining the research of accounting issues. This resulted in a major restructuring of accounting and financial reporting standards. All professionals, both in public accounting and industry, must have a strong familiarity with successfully negotiating through this valuable resource.

Objectives: Upon completion of this course, participants will be able to: Explain how the FASB Codification is structured and why it was created • Successfully use this tool in researching accounting and financial reporting issues

Highlights: Detailed explanation of how the Codification is structured and why it was created • Distinguishing between authoritative and non-authoritative accounting guidance • Explanation of the standard setter's motivation for the general movement towards principle-based accounting standards and convergence with international financial reporting standards • Overview of recent accounting standards updates within the Codification • Summarization of the conceptual framework for financial statement reporting • Illustrations of how to research several common practical accounting issues • How to access the Codification

Designed for: Professionals who require detailed guidance on how to perform accounting research using the FASB Codification

Recommended CPE: 8
Prerequisites: None
Event ID: RSRCHCOD
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Personal Leadership in the New Normal new

This workshop is designed to provide new information and an opportunity for participants to apply that information in the contexts of their everyday lives so that we go beyond theory and into practice.*Certification and licensing is available for this product.

Objectives: The participant will: • Know Where You Are - baseline assessments – identify what assets you are bringing to the proverbial table • Stretch for the Future - if you don't know where you are going any road will take you there – create a motivating destination for yourself • Balance Your Portfolio - knowing where you are investing your time, talent and treasure and to what effect • The Art of Network Leadership - facilitating conversations that change the trajectory of ideas

Highlights: Introduction to the science of well-being • Identification of strength-based personal assets • Creation of a motivating personal vision • Application of evidence-based tools • Applicability in professional and personal domains

Designed for: All who are leaders or aspire to be leaders

Recommended CPE: 16
Prerequisites: The ability to embracte strategic thinking and future-minded flexibility
Event ID: M2M
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development Strategic Management
Author/s: Gretchen Pisano

Course Listing

Personality Styles in the Workplace new

Experience accounts for only 15% of workplace success. The other 85% is due to people skills! Take the DISC Profile and identify your own personality style. If you can understand and understand others from the perspective of what motivates them and how best to interact with them, you can dramatically increase your workplace effectiveness.

Objectives: Upon completion of this course students will be able to: • Define the four basic personality styles based on the DISC profile • Read characteristic behavior in others • Adjust their interactions with others based on their personality style

Highlights: Complete a DISC Profile to identify your dominant personality style • Define all four personality styles • Describe strengths and weaknesses • Identify motivating and de-motivating factors • Determine effective communication techniques appropriate for each style • Practice methods for interacting with differing personality styles

Designed for: Anyone who would like to learn how to successfully present an idea

Recommended CPE: 4
Prerequisites: None
Event ID: PERSTYLE
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Jennifer Elder, CPA

Personality Styles: What You Absolutely Should Know About Yourself & Others

Having a better understanding of how different personality types are likely to communicate and react to situations will help you plan better interactions with others. In this course, you'll learn to recognize your own natural personality style and how to quickly identify the personality style of others in order to interact with them more effectively.

Objectives: Upon completion of this course, participants will be able to: Identify the four major personality styles and explain how each tends to act and communicate • Master how to identify the dominant personality style of others • Discover how to adjust your natural style to more effectively interact and communicate with others • Explain how to use this knowledge to get the "most" out of others (motivating, decision-making, performance, etc.)

Highlights: A description of the four major personality styles, plus a detailed analysis of your own style based on completion of a self-assessment personality test taken during class • Analyze how to use your natural strengths to your advantage, and how to control your weaknesses • Develop action plans for future interactions with key people (peers, clients, supervisors, staff, etc.)

Designed for: Anyone interested in improving interpersonal relationships with staff, peers, supervisors and clients

Recommended CPE: 4
Prerequisites: A self-assessment test is required to be taken during this course, which will be billed at a additional cost on a per participant basis
Event ID: PSWY
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Jennifer Louis, CPA

Planning and Implementing the Balanced Scorecard new

There is more to understanding the success of business than the bottom-line. The Balance Scorecard looks beyond the standard financial measures of success and incorporates factors related to customers, employees, and internal business processes. Learn how the Balanced Scorecard can be used to take your organization to the next level.

Objectives: At the end of this course students will be able to: • Understand and define the Balanced Scorecard approach • Apply the methods to measure alternate indicators of performance and success

Highlights: Incorporating vision and strategy • Financial, Customer, Growth & Learning, Business Process perspectives • Developing Key Performance Indicators • Creating targets and goals • Feedback loops

Designed for: Anyone interested in increasing the success of their organization

Recommended CPE: 8
Prerequisites: None
Event ID: BALSCORE
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management Performance Management
Author/s: Jennifer Elder, CPA

The Power to Influence and Connect

Many people achieve their influence objectives only at the expense of important relationships. Others habitually avoid challenging influence situations at the expense of fulfilling their work goal. This course focuses on influencing peers, direct reports, colleagues, managers, clients, and suppliers - both inside and outside one's organization - while maintaining and nurturing important work relationships.

Objectives: Analyze a framework for more effective influencing in situations where there is lack of authority to dictate desired activities • Gain buy-in for one's ideas, securing cooperation and sustaining action • Examine the 12 influencing techniques of the Influencing Inventory • Develop a list of influencing approaches that correspond to circumstance and comfort level

Highlights: Gain critical approaches to Influencing to use as a job aid when returning to work

Designed for: Professionals at all levels of an organization

Recommended CPE: 8
Prerequisites: Management experience
Event ID: INFL
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Mark Jankowski

Power Point (2007 & 2010): Creating Dynamic Financial Presentations with Business Graphics

Whether you want to "wow" your audience and/or convey a serious message simply, this course will give you many examples of how to incorporate graphics into a presentation. You can choose from the right pre-designed graphic or build your own graphics and diagrams. A variety of software applications will be discussed and demonstrated. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Learn to choose the best graphics for your topic and your audience

Highlights: Understand the impact of a variety of graphic symbols and colors • Compare uses of chart types • Apply Excel's new color scales and icon sets to visually spot trends in data • Learn how to present Pivot Table results in graphic form • Add a secondary pie chart and a secondary axis to present a breakout of multiple sets of data • Use flow chart symbols and connectors • Add data tables to charts to quickly present the numeric values • Incorporate photos, ClipArt, logos, video, sound • Utilize photo adjustment tools • Use Power Point and Visio to save you time with flow charts and diagrams • Use stencils and templates for workflow and organization charts • Use freely distributed pre-designed SmartArt templates • Use Power Point features to place graphics into a presentation • link data ranges or charts • Learn important presenter tips • Learn how to convert your Power Point presentation into a video file • and more

Designed for: CPAs and Professionals at all levels of an organization who prepare, review and give presentations

Recommended CPE: 8
Prerequisites: Basic knowledge of MS Office Application Software
Event ID: BGRAPHIC
Course Level: Update
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Communications Skills
Author/s: Judith Borsher, CPA, MBA

Practical Accounting and Auditing Issues Facing Nonprofit Entities

new

This course will provide an overview of significant relevant financial audit accounting and reporting issues, as well as concepts important to maintain the quality of a nonprofit entity financial statement audit.

Objectives: Upon completion of this course, the participant will be able to: • Explain more complex accounting and auditing issues related to non-profits with complex operations • Describe the impact of economic, legislative and regulatory developments on assessing risk and performing audit procedures related to audits of nonprofit entities • Discuss important aspects of quality control in the audit process

Highlights: Economic, legislative and regulatory developments impacting nonprofit entities • Financial management issues and developments • Indirect cost rate calculations, including subsequent adjustments • Assessing risk and gathering sufficient appropriate audit evidence when foreign operations exist • Classification of net assets (temp/perm restrictions) • Endowments (accounting, disclosures and UPMIFA) • Non-cash contributions • Contributions received and receivable • Split-interest agreements • Expense recognition issues • Reporting related entities, including consolidation • Tips for effective and efficient work paper review process that complies with relevant standards • The critical role of the engagement partner related to the overall quality of an engagement

Designed for: Auditing professionals who specialize in audits of nonprofit entities

Recommended CPE: 8
Prerequisites: Experience with audits of nonprofit entities
Event ID: PAANFP
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting (Gvmt)
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Course Listing

Practical Accounting and Auditing Update for Governmental and Nonprofit Entities new

This course provides a high level overview of the most important issues facing governmental and nonprofit entities and their accountants, including Yellow Book and A-133 compliance audits.

Objectives: Explain the theory behind major issues and trends as it relates to standards in accounting, financial reporting, audits, compilations and reviews.

Highlights: Discussion of financial reporting risks increased by the current economic environment • Overview of the movement towards convergence, and possible transition, to IFRS • Update on progress towards a separate set of accounting standards for non-issuers • Discussion of the general organization and use of the FASB Codification • Executive summary of recent Accounting Standards Updates and FASB/IASB Joint Projects • Overview of fair value disclosure requirements and implementation issues • Discussion of issues related to donor-restricted endowment funds • Executive summary of recently-issued GASB pronouncements • Discussion of the latest Yellow Book revisions • Overview of the latest developments of OMB Circular A-133 and OMB Compliance Supplement • Update of the Auditing Standards Board activitiesV • Evaluating the propriety of identifying, evaluating and communicating internal control deficiencies noted in financial statement and compliance audits

Designed for: Governmental and nonprofit accounting and auditing professionals who desire to be kept abreast of changes in various accounting and attest standards, including compliance audits

Recommended CPE: 8
Prerequisites: None
Event ID: PAAUGNE
Course Level: Update
Format/s: Group Live
Field of Study: Accounting (Gvmt)
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Practical Explanations of Accounting & Auditing Updates for Industry new

All finance and accounting professionals need to stay abreast of significant changes in various standards to varying degrees, including standards related to accounting, financial reporting, and attestation. However, not all professionals need detailed case studies and application explanation. This course provides a practical overview of the most important issues facing most companies and their accountants

Objectives: Explain the theories behind major issues and trends in plain language, enabling professionals to understand the most important aspects of relevant standards and why any planned or potential changes are coming down the pike.

Highlights: Discussion of financial reporting risks increased by the current economic environment, including increased uncertainty related to critical financial statement amounts and significant disclosures • Overview of the movement towards convergence and possible transition to IFRS • Executive summary of recent Accounting Standards Updates and FASB/IASB Joint Projects • Overview of fair value disclosure requirements and implementation issues • Explanation of recent enhancements to revenue recognition guidelines • Evaluating the importance of identifying, evaluating and re-mediating internal control deficiencies, including Sarbanes-Oxley Section 404 compliance

Designed for: Industry professionals who desire to be kept abreast of changes in various accounting and attest standards, but who do not perform financial statement audits themselves

Recommended CPE: 8
Prerequisites: None
Event ID: PEXAAI
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Practical Networking and Business Development for CPAs

Networking and business development skill don't typically come naturally to CPAs. This course will offer practical and easily utilized knowledge for networking and developing referral channels taught by a business development expert for a CPA firm.

Objectives: From this course you will learn both why and how-to handle yourself in a myriad of networking situations and use these contacts to build robust, long-term referral channels without compromising authenticity.

Highlights: How to identify places to network • How to prepare • What do when you are there • How to follow up • An insider's look and tips about how successful CPAs use networking to develop referral channels

Designed for: CPAs who wants to grow their book of business

Recommended CPE: 2
Prerequisites: None
Event ID: NETBD I
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communication Skills, Strategic Management
Author/s: Andrew Rose

Preparing a Winning Business Plan new

A good business plan is essential for start-ups – to obtain financing or investments, to double-check assumptions, and create a viable operational model. It's also beneficial for existing businesses - providing a road map to keep you on focused and moving toward goals. Learn the essential elements of a business plan and how to turn it into a usable and successful action plan.

Objectives: At the end of this course, students will understand the various uses of a business plan and be able to prepare a complete business plan.

Highlights: Elements of a business plan • Determining the right length • Assessing potential and viability • Adjusting the plan for your audience • Methods for completing each section

Designed for: Anyone in business

Recommended CPE: 8
Prerequisites: None
Event ID: WINPLAN
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Preparing for the Coming Wave of Accounting Standards new

For many years, standard setters on both sides of the Atlantic have worked to create a platform which could lead to global financial reporting. Their efforts are now resulting in radical changes in the financial reporting model that US GAAP has used for many years. This sequence of courses explains the practical issues involved in implementing these new standards. (Available in a 4-8 hour format)

Objectives: Understand how the FASB/IASB convergence process will radically alter US GAAP over the coming 2-5 years • Study the convergence agenda and the major issues that remain to be resolved • Become familiar with the Boards' agreed-upon approach to financial statement presentation, revenue recognition, leases, consolidations and a range of other issues • Appreciate the transition implications of the new standards for US companies

Highlights: Coverage and depth will be selected from the following: Convergence: where are we today and how soon will it happen? • Revenue recognition • Lease accounting • Accounting for financial instruments • Comprehensive income • Fair value accounting • Financial statement presentation • Consolidation and equity accounting • Other developing topics

Designed for: Preparers and accountants in public practice who need to come to terms with the new accounting standards and their potential impact on their companies' financial reporting

Recommended CPE: 8
Prerequisites: None
Event ID: WAVE
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Preparing for the Coming Wave of Accounting Standards: Fair Value Measurement new

This course explains this approach and considers its consequences, especially where fair value information may not be readily available, easily verifiable or cost prohibitive to obtain. Fair value also involves interaction between preparers, auditors and any specialists, which poses difficult issues of interaction and independence.

Objectives: Understand the fundamental principles of the fair value model developed by FASB and adopted by IASB • Appreciate how and where fair value is used in today's accounting standards • Appreciate how the levels in the fair value hierarchy drive estimation, recognition and disclosure • Recognize how fair values can be affected by uncertain market conditions • Apply the fair value guidance to non-financial assets, liabilities and other complex situations • Understand the auditing and independence implications of fair value accounting for preparers, auditors and valuation specialists

Highlights: What is fair value? • Use of fair value in GAAP today • SFAS 157 and the fair value hierarchy • Valuation concepts embodied in the standards, highest and best use etc. • Fair value in troubled markets • Applying fair value to non-financial assets, liabilities., pensions etc. • Auditing fair value, independence issues

Designed for: Preparers and accountants in public practice who need to understand the way in which fair value reporting is reshaping their financial reporting responsibilities

Recommended CPE: 2
Prerequisites: None
Event ID: WAVEFVM
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Preparing for the Coming Wave of Accounting Standards: Financial Instruments, Debt & Equity Accounting and Comprehensive Income new

This course will track both Boards' proposals as they evolve (hopefully) to an agreed approach to accounting in this difficult area. (Available in 2 - 4 hour formats)

Objectives: Upon completion of this course, the participant will: • Understand the fundamental principles of financial instrument accounting as developed by FASB and IASB • Learn how to analyze financial instruments and FASB's fair value principles • Become aware of how basic guidance for financial assets and liabilities is to be interpreted in commercial and financial services entities • Understand the Boards' approach to credit impairment and write downs of debt and equity securities

Highlights: FASB's fair value model: How it agrees with and differs from current IASB approach • major changes to accounting for financial instruments, who is affected and how • The new approach to comprehensive income display and reporting • Initial recognition and subsequent measurement of the major financial instruments, exceptions and special treatments • The credit impairment model • The proposed accounting approach to derivatives and hedging

Designed for: Preparers and accountants in public practice who need to understand the proposed reporting requirements for financial assets and liabilities and their practical impact on a company's income and balance sheet reporting

Recommended CPE: 4
Prerequisites: None
Event ID: WAVEFINS
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Preparing for the Coming Wave of Accounting Standards: IFRS GAAP Convergence new

This course provides an in-depth explanation of how far FASB and IASB have come in their attempt to create common standards. The course will set out the convergence agenda and pay particular attention to the areas of revenue recognition and lease accounting. The Boards' agreed approach in these areas will be explained and evaluated. Any areas of continuing differences between the Boards' standards, are also discussed.

Objectives: Upon completion of this course, the participant will: • Become familiar with the convergence process which will harmonize accounting standards between FASB and IASB • Understand the major convergence projects that are currently being undertaken by the Boards and their expected results and timing • Understand the recently agreed approaches to lease accounting and revenue recognition • Understand the significant differences still remaining between GAAP and IFRS in accounting for fixed assets, including depreciation, impairment and the revaluation model • Appreciate the size of the task remaining in converging standards by the Boards target date of 2011

Highlights: How convergence fits into the road map for global financial reporting • The convergence agenda for the coming two years • Financial instrument accounting and fair value measurement • Consolidation, financial statement presentation and the conceptual framework • FASB/IASB discussion documents on revenue recognition and leases

Designed for: Accountants working with companies and those in public practice who need to gain familiarity with the way in which standards are changing as a result of the convergence process

Recommended CPE: 2
Prerequisites: None
Event ID: WAVEIFRS
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Preparing for the Coming Wave of Accounting Standards: Lease Accounting new

This course provides a comprehensive analysis of the exposure draft and its impact on your company and/or clients.

Objectives: Understand the fundamental principles of the lease accounting models developed by FASB and IASB • Learn how the lessor should analyze lease transactions and account for them on the balance sheet and income statement using the more-likely-than-not approach • Understand lessor accounting in terms of the alternative, performance obligation and de-recognition approaches

Highlights: Capital versus operating leases today • The rights and obligations approach to lessor accounting • Lessee accounting: The expected value, amortized cost approach • Lessor accounting for terminations, renewals and other contingent payments • Lessor accounting: The performance obligation versus the de-recognition approach • Transition and implementation

Designed for: Preparers and accountants in public practice who need to understand the proposed lease reporting rules and their practical impact on a company's performance metrics

Recommended CPE: 2
Prerequisites: None
Event ID: WAVELEAS
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Preparing for the Coming Wave of Accounting Standards: Revenue Recognition

This course provides a comprehensive analysis of the exposure draft and its impact on your company and / or clients.(Available in a 2-4 hour format)

Objectives: Understand the fundamental principles of the contract based approach to revenue recognition developed by FASB and IASB • Learn how to analyze contracts and account for them in terms of their performance obligations • Be aware of how basic guidance is interpreted in more complex transactions involving return rights, further incentives, warranties, upfront fees and similar arrangements • Understand the multiple deliverables issue and the Boards' approach to developing an effective accounting model to portray transactions • Appreciate how the percent of completion approach may be radically changed by the revised accounting model

Highlights: The asset based approach to revenue recognition • Analyzing contacts and performance obligations • Identify and satisfying performance obligations • More complex transactions - an examples based approach • Continuous delivery and percent of completion • Multiple deliverables and contract separation

Designed for: Preparers and accountants in public practice who need to understand the proposed revenue reporting rules and their practical impact upon a company's performance metrics

Recommended CPE: 4
Prerequisites: None
Event ID: REVREG
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Presentation Skills Workshop

Communication is a core skill of any leader, current or future. Professionals who can develop effective presentations and delivery skills tend to be seen as leaders and persuasive communicators. Appropriate use of technology will also enhance a presentation. (Group Format is one or two full days. Practice/review/feedback time is built into the second day. One-on-one executive coaching is a minimum of 2 hours. Four hours is recommended.

Objectives: Develop a logical presentation that focuses on a core message(s) • Use Microsoft Power Point to highlight and reinforce a core message(s) • Develop supportive content that defends the logic of a presentation • Use focus and energy to deliver a presentation and handle questions

Highlights: Organize thoughts to develop a compelling explanation of main ideas • Use language to reinforce main and support ideas • Challenge the thinking behind the ideas and data included in the presentation • Prepare back up material sufficient to respond to challenges and concerns of recipients • Practice using focus and energy so that eye contact and vocal patterns connect the presenter and his/her ideas to the recipients • Use Microsoft Power Point to develop the core idea into a visual format and apply appropriate visual tools to retain focus on the core idea • Compare Excel vs. Word vs. Power Point features for strengths, weaknesses, and guidelines for incorporating tables and graphs into presentations • and more

Designed for: CPAs and Professionals at all levels of an organization needing to enhance presentation content and presenter skills

Recommended CPE: 8
Prerequisites: Basic knowledge of Power Point
Event ID: PSW
Course Level: Update
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Judith Borsher, CPA, MBA

Presentation Skills: Message Based Presentations

Every professional has to present ideas to others. Effective presentation of those ideas can strengthen relationships, affect the outcome of teamwork and bring in new business. Yet, making a presentation effectively remains one of the big challenges of the business world. This workshop enables participants to deliver a clear message, supported by appropriate facts and examples, and presented with a logic the listeners can understand. Participants will learn to use the key skills of focus and voice in a way suitable to them and not to a stage performance. This workshop is also offered in a 16-hour segment by adding the following options: preparing visual aids, working with a script and/or a TelePrompterr, developing scripts and delivering difficult information.

Objectives: Developing a message-based presentation • Using media/visual aids to support major ideas and guide listeners • Using skills that enable listeners to "hear" ideas • Preparing for and managing questions and answers

Highlights: Videotaping and critique of presentations • Small group and/or individual work • Message-based presentation is featured in "The Idiot's Guide to Effective Business Presentations" (Macmillan, 1996)

Designed for: Professionals who must present before small or large business groups effectively, persuasively and confidently

Recommended CPE: 8
Prerequisites: None
Event ID: MBP
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Presenting Financial Data to Non-Financial Audiences - Avoiding Over-simplification new

Knowing the details of finance, accounting, and auditing data is critical to the professional in finance, accounting, and/or audit. However, presenting that information to people who do not fully understand the concepts, terminology, and significance of the data can be frustrating for everyone. What does "that word" mean? Is that table showing me something I need to know? Is that graph significant to the decisions I make? How can I ask a question without looking uninformed? This course will help professionals in finance, accounting, and auditing prepare presentations that make sense to professionals in other business specialties. Non-finance professionals will be able to understand the relevance of the information, ask pertinent questions, and use the information for their business purposes.

Objectives: Identify the main and supporting messages in business terms • Build business presentations that are focused, clear, and logical • Manage technical language so that it is precise to the concepts being conveyed and familiar to the audience • Support the presentation with appropriate and relevant tables and charts/graphs

Highlights: Learn and apply a planning process that ensures the main message is clear and logically supported • Increase confidence in how to communicate professionally and clearly without "dumbing down" the content • Simplify tables and charts/graphs so that they communicate clear business messages

Designed for: All levels

Recommended CPE: 8
Prerequisites: None
Event ID: PFDNFA
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Presenting Financial Information Clearly and Effectively new

Managers deliver important presentations to each other, to staff, and to executives who must use the information and make significant decisions. This workshop will enable participants to design and deliver presentations that are clear, effective, and relevant to the business concerns of the listeners.

Objectives: Identify the main and supporting messages in business terms • Build business presentations that are focused, clear, and logical • Develop effective executive summary for financial presentations • Manage technical language so that it is precise to the concepts being conveyed and familiar to the audience • Support the presentation with appropriate and relevant tables and charts/graphs

Highlights: Learn and apply a planning process that ensures the main message is clear and logically supported so that the listeners understand the meanings behind the numbers • Increase confidence in how to communicate professionally and clearly, tie the presentation to current business concerns, and position the content to secure "buy-in" • Simplify tables and charts/graphs so that they communicate clear business messages

Designed for: Staff, Managers, and Executives who present financial information to other accounting and finance professionals and also to non-accounting and finance professionals

Recommended CPE: 4
Prerequisites: None
Event ID: PFICE
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Pricing on Purpose (for Industry)

This course will give you alternatives to pricing your products and/or services based on customer-perceived value, rather than cost-plus pricing methods. By learning to avoid the deleterious consequences of cost-plus pricing, you will communicate better with customers, be able to discover their expectations up-front, enhance their loyalty and retention, and increase your profitability. Participants will be given alternative pricing methods that focus on customer-perceived value and will be better equipped to deal with the death of cost-plus pricing.

Objectives: Learn alternative pricing methods that focus on customer-perceived value and be better equipped to deal with the death of cost-plus pricing

Highlights: Why are we in business and what do customers really buy • The genesis of cost-plus pricing and why so many businesses still cling to it • All customers are not created equal and the economics of price discrimination • Learn why cost-plus pricing has debilitating effects on the operation of your business: 1) Penalizes innovation, ingenuity and creativity and rewards inefficiency, and profligacy; 2) Emphasizes and rewards based upon volume and effort rather than creativity, profitability and results; Imparts a technician-like attitude among associates, rather than cultivating customer service professionals; 3) Actually reduces revenue when investments in technology reduce the cost required to produce various products and services

Designed for: Any executive interested in being among the leaders in the business world, moving away from the cost-plus pricing method to achieve a competitive differentiation, and are tired of sacrificing profits on the altar costs

Recommended CPE: 8
Prerequisites: None
Event ID: POPI
Course Level: Intermediate
Format/s: Group Live
Field of Study: Marketing
BLI Curriculum: Strategic Management
Author/s: Ronald Baker, CPA

Producing Powerful Presentations: Performance and Profit

A powerful presentation can be the key to professional success. It can enhance your career, contribute to business development, and communicate your ideas effectively. This course is designed to help you master the art of presentation, from planning to closing. Taught by experienced instructors with a proven track record of outstanding presentations, this course will take your communication skills to the next level. (Also available in 4 hours)

Objectives: Enhance the effectiveness of even the best presenters • Learn how to use presentation skills to build trust • Be able to provide a solid approach that will reduce the time and effort in producing winning presentations

Highlights: Powering Your Presentation: Harnessing Passion and Impact • Building the Best Presentation: Careful Construction Tips and Tricks • Laying A Solid Foundation: The Four Pillars of Confidence • Clearing the Deck: Increasing Your Impact Page by Page • Making Your Message Memorable: Six Sticky Elements • Using Your Physical Tools: The Power of the Non-Verbals

Designed for: Anyone seeking a simple, clear approach to improving presentation skills

Recommended CPE: 8
Prerequisites: None
Event ID: POWPRE
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Greg Conderacci, Robert "Hap" Cooper

Professional Issues Update

Come here this entertaining and informative coverage of the major issues happening in the accounting world today. This special update for financial professionals will feature a conversation about the 'new normal' - what it is and what it means. Tom Hood, recently named as one of the Top 100 Most Influential People in the CPA Profession will cover the four mega-trends facing the accounting and finance professions - the economy, globalization, workforce, and technology. You will hear updates on globalization, IFRS, XBRL, pending legislation and regulation. In addition, Tom will cover how you can use social media to strengthen your professional network, get recognized as thought leaders, and build a global professional network. Tom finishes with tips and techniques to help you keep up with theses rapid changes and use them to enhance your leadership and collaboration skills.

Objectives: Discuss the current state of the profession and what you can do to adapt to the significant changes that are ahead • Review issues and proposed legislation relevant to CPAs and the profession • Understand the structure of the CPA profession and what is driving the changes

Highlights: Latest developments in the CPA profession • IFRS: What does it mean to you • FASB & ASB re-codification and the new financial reporting task force • The latest in generational issues and talent management • Trends and issues facing CPA firms and business, industry and government

Designed for: CPAs who want to stay current on what is happening in the Profession.

Recommended CPE: 4
Prerequisites: None
Event ID: PIU
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management Strategic Management
Author/s: Tom Hood, CPA, CITP

Professionalism, Civility and Business Etiquette

Success in the business world is about much more than just your technical knowledge. In order to present oneself with polish and authority, there is a set of rules one must know. Learn what it takes to be comfortable in most any business situation including: proper handshaking, introductions, cell phone, telephone and email etiquette, common courtesies for the office and appropriate thank-you's. This program can also include business dining etiquette. This course is available in a four and eight hour format.

Objectives: To ensure that everyone in an office is representing themselves and the company in the most positive and professional manner possible

Highlights: Professional Image: Handshake, body language, professional attire; voice, space • Communication Savvy: Meeting people, proper introductions, conversation skills, mingling, networking, telephone etiquette, electronic etiquette, thank you notes • Dining Etiquette: American and continental styles of dining; napkin know-how, eating various foods, place settings, taking a client to dine

Designed for: Financial Professionals

Recommended CPE: 0
Prerequisites: None
Event ID: PCBE
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Cathleen Hanson, Carol Haislip

Project Management - Delivering Results On Time and Within Budget

Imagine the impact on overall organizational performance if the number of projects completed on time, on target and on budget increased by 30 percent! What would that mean to your organization, your employees and your customers*

Objectives: Learn real-world solutions to increase project efficiency, significantly reduce misunderstandings and gain greater confidence handling problems as they arise during the life of the project

Highlights: How to manage the people side of project management for stronger results • The triple constraints of successful project management • A practical time-management tool for identifying the scope of every project • How to manage three critical communication points during the life of every project • Three fundamental ingredients needed for every project plan • Strategies for keeping track of multiple project pieces • The importance of risk assessment during the project-planning process • A realistic formula for estimating task time • Why a Next Time Analysis is critical to future project management success • Two key ingredients essential to project scheduling and resource allocation • Why the WBS, GANTT and PERT charts can be critical to project success • How to use the continuous loop process to identify and solve problems sooner • How to turn meetings into a practical problem-solving tool for any project

Designed for: Professionals who manage multiple projects

Recommended CPE: 8
Prerequisites: None
Event ID: OTPM
Course Level: Overview
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Ray Perry

Project Management: Get the Buy-In to Get Results

Project planning is challenging because activities and benchmarks have to first be identified, then scheduled and systematized. Then, the people who have to perform those tasks, resulting in modified work schedules and processes, need to buy into the plan. Often, this leads to greater resistance and more expensive project work as a result. This program introduces a planning process that integrates activities and people issues to produce a bought into plan that can be implemented.

Objectives: Integrate the activity and people elements of project planning • Integrate disaster scenario planning and contingency thinking into the planning process • Define goals and milestones using SMART and behavior targets • Describe team work skills that can improve project planning and project execution

Highlights: Disaster scenarios and contingency thinking increases a plan's flexibility and a team's preparedness • Integrating SMART goals and milestones with behavior targets • Addressing the challenges to project planning and execution

Designed for: Anyone who participates in project planning, manages projects or oversees projects

Recommended CPE: 8
Prerequisites: None
Event ID: PMIP
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Lin Kroeger, CMC

Proposed Lease Accounting -How Do You Run an Airline Without Airplanes? new

Hear the latest on the proposed new Lease Accounting rules – and you thought accounting was boring!

Objectives: After attending this program, the participant will understand the latest version of the proposed new lease accounting standard

Highlights: Review the existing lease accounting standards • Hear about the proposed accounting rules from FASB • Learn about asset capitalization, loan amortization, and determining incremental borrowing rates when the organization does not have outside debt • A sample illustration from an actual lessee will be included in the program

Designed for: CPAs in practice, CPAs/accountants in not-for-profit organizations, industry and education who desire to learn about the proposed lease accounting standards

Recommended CPE: 4
Prerequisites: Knowledge of Current Lease Accounting Rules
Event ID: LEASACCT
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Anthony Cuozzo, CPA, CGFM

Public Speaking and Presentational Skills for Accountants

Jerry Seinfeld once said that at a funeral, most people would rather be in the casket than giving the eulogy. America's greatest anxiety, public speaking, is a necessity in today's business world. Those who can speak in front of crowds and have effective presentational skills tend to move up the corporate ladder more swiftly. The ability to stand in front of an audience, project confidence and knowledge, all the while making a connection and capturing your audiences imagination is very powerful and persuasive. In this course, participants will learn how to overcome their fear of public speaking and be well prepared to present information in a concise and logical manner.

Objectives: Eliminate fear of public speaking • Be prepared for upcoming presentations • Know how to compile your information in a concise and logical manner • Be able to prepare an eye-catching and powerful Power Point presentation • Understand how to present information without the use of Power Point • Know how to regain composure when something unexpected occurs • Examine how to use strong body language when giving a presentation • Be able to capture the imagination of your audience

Highlights: Ways to eliminate the fear of speaking in front of others • Being well prepared before you speak • Having your speech well thought out and rehearsed to help eliminating fear • How to effectively use Power Point and its applications in getting your topic across

Designed for: Accounting, financial, and managerial professionals who want to present before groups (both large and small) more effectively

Recommended CPE: 2
Prerequisites: None
Event ID: SPEAK
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Peter Margaritis, CPA, MAcc

Reading Clients Minds and Understanding How They're Reading Yours

Learn the art of reading customer tells a skill which has made millions of dollars at the poker table for many. Participants will review the science of body language and Microexpressions the specific and involuntary movements of the 43 human facial muscles indicating contempt, disgust, fear and myriad other motivating emotions and gain an understanding of how to use the powers of observation to better read their environment. (also available as a keynote or 4 hours)

Objectives: Understand how and why the brain telegraphs our intentions • Enhance your powers of observation so you may better read your environment • Understand the language of your feet, legs, torso, arms and hands • Be able to recognize the fleeting facial microexpressions that cannot be consciously controlled • Understand your own communication preferences and be able to better align them with those you wish to influence

Highlights: A quick tour of the triune brain structure • Inattentional Blindness: Games and exercises to understand why we dont see whats right in front of us • A Walking Tour of the Body: Learn about the most honest part of the body and participate in several exercises to observe your own body language, and that of your colleagues • Microexpression Training: Take a baseline assessment to learn your natural ability to read faces • Four Quadrant Profile: Personal preferred modes of communicating and receiving information • Learn how you best interact and how to spot the preferences of others

Designed for: Anyone seeking another tool in the arsenal of influence

Recommended CPE: 8
Prerequisites: None
Event ID: MINDB
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Robert "Hap" Cooper

Real Numbers Through Lean Accounting

The business enterprise has evolved dramatically over the past 100 years. Many business professionals claim that traditional accounting practices have not evolved and no longer support modern operations. This has most clearly been demonstrated in manufacturing, where manufacturers have moved from batch processing to single-piece flow processing, a result of applying "lean" principles perfected in the Toyota Production System. Lean operations have now taken root in most industries. Healthcare, service, construction, government, and countless other industries successfully apply lean concepts to eliminate waste and get more from fewer resources. So what are progressive finance and accounting professionals to do with the conflict between traditional accounting practices and modern lean operations at odds? The notion of "lean accounting" seeks to address this problem.

Objectives: Learn how Jean Cunningham, former CFO of Lantech, became a change agent and aligned accounting with lean operations. You'll learn about the financial impact that resulted as she shares lessons learned and provides practical recommendations to start your lean accounting journey.

Highlights: Apply lean principles perfected in the Toyota Production System to accounting operations • Learn how to apply successful lean concepts • Continuous improvement in accounting

Designed for: CEOs, CFOs and COOs

Recommended CPE: 2
Prerequisites: Management experience
Event ID: RNLA
Course Level: Intermediate
Format/s: Webcast - 2 hour
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jean Cunningham

Respecting Diversity

What would happen to productivity and morale if more employees embraced the value of diversity and respected each other's differences? What impact would this have on the success of your organization?

Objectives: Learn how to appreciate diversity by minimizing misunderstandings, respecting differences and building a stronger rapport with employees

Highlights: Three critical roles stereotypes play in discrimination • Specific strategies for leveraging the diversity process • Two approaches to successfully deal with any type of conflict • How to communicate by asking open-ended questions and actively listening to responses • The importance of accepting, respecting and appreciating differences between team members • How to positively influence the attitudes team members have about diversity • The importance of open communication to diversity management and the best ways to practice it • Four strategies to modify behavior to improve work relationships with diverse team members • The different barriers involved in accepting diversity and how this can unknowingly make life more stressful at work

Designed for: All levels within an organization

Recommended CPE: 8
Prerequisites: None
Event ID: RD
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Ray Perry

Results-Driven Leadership -- Bridging the Gap Between Strategy and Execution

How many of your managers are real leaders? What would happen to organizational productivity if they developed this critical management skill?

Objectives: Help managers identify and develop the leadership strategies that will strengthen overall performance resulting in enhanced employee morale, customer satisfaction and profitability

Highlights: Three key differences between leadership and management, and how to make the transition • What is emotional intelligence and how to develop it as a leader • The five key questions to ask when developing a strategic vision • Five specific strategies for building unquestionable trust with employees • Why situational leadership is important to team success • How to become a more take-charge leader that generates loyalty with team members • How to grow team member performance through a proactive professional development program • How to use situational delegation to gain commitment to accountability • The best way to get consistent employee results through the performance appraisal process • How to trigger emotional responses in team members so they'll naturally want to follow you

Designed for: Managers interested in improving leadership skills

Recommended CPE: 8
Prerequisites: None
Event ID: LSFM
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Risk Management - Disaster Recovery Planning new

Did you know that 35% of businesses never reopen after a disaster? While we think of disasters as storms or fires, even small events can have disastrous results to the bottom line. If a server goes down, it only takes 48 hours for a business to suffer permanent damage. In order to prevent or minimize losses every business needs a plan to protect their assets, prevent damage, and prepare for recovery. In this course you will learn how to identify and prioritize risks, develop countermeasures to protect against loss, and learn the step by step process for preparing a disaster recovery plan.

Objectives: Conduct impact and risk analysis • Identify methods for disaster prevention and loss mitigation • Learn the process for preparing an effective disaster recovery plan

Highlights: Conduct risk assessment and impact analysis • Learn methods for protecting assets and income • Identify mission-critical business functions • Evaluate alternatives and develop a plan for business continuity • Create effective teams and develop a communication plan for use during an emergency • Develop a disaster recovery plan covering preparations, mitigation, and recovery

Designed for: Anyone in business

Recommended CPE: 8
Prerequisites: None
Event ID: RMDRP
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Sarbanes-Oxley Section 404: What Everyone Needs to Know About Internal Controls

Corporations must continually assess and improve their internal control systems to achieve profitability targets, ensure reliable financial reporting, and comply with laws and regulations. Unfortunately, many people struggle with this sometimes daunting task of internal controls.

Objectives: Upon completion of this course, participants will be able to: • Explain the basics of internal controls, including employee roles • Correlate requirements of Sarbanes-Oxley Section 404 • Describe how to monitor the effectiveness of internal control • Discuss what independent auditors are most concerned about in relation to internal control design and operation • Know how to avoid potential pitfalls in the audit

Highlights: Current events • Renewed focus on fraud - Responsibilities with detection and prevention • Requirements of Sarbanes-Oxley Section 404 • Overview of the COSO Report: Internal Control - Integrated Framework • Defining the components that comprise a sound internal control environment • Organization tone - How it influences the control consciousness of its people • Analyzing risks relevant to achieving financial reporting objectives • Identifying key controls over financial reporting • Information and communication • Methods for testing the effectiveness of controls over financial reporting • What external auditors look for and why • Common audit pitfalls • Practical Application - Relating to real-life initiatives

Designed for: Finance and operations professionals interested in internal controls, and an overview of the impact of Sarbanes-Oxley Section 404

Recommended CPE: 4
Prerequisites: None
Event ID: SOXW
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Selling for CPAs: Using Your Problem-Solving Skills to Promote Profitable Business Growth

Good news! You don't have to have a CPA to be a great salesperson - but it can help. The same problem-solving skills you use so effectively to advise your clients can be put to work selling them future engagements. It also works well for those who must sell to internal clients. (This course is also available in a 4-hour format.)

Objectives: Learn how to harness problem-solving skills to build stronger relationships with prospects, clients -- and anybody else that matters to you

Highlights: Organize a sales presentations more effectively • Probe for sensitive client needs painlessly • Develop client or prospect trust • Address objections and close business

Designed for: Rain-makers and those who would like to be

Recommended CPE: 8
Prerequisites: None
Event ID: UPSS
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Business Management Communications Skills
Author/s: Greg Conderacci

Seven Secrets of Successful Business Writing new

Although good business writing can be a life-long pursuit, it is possible to learn the basic principles of good business writing in a relatively short period of time. This course is about the art and skill of good business writing. In particular, it's about how to write business letters, memos, reports, and e-mails in a clear, concise and effective manner that will reflect well on the writer, be easy to read and meet the needs of his or her organization. (Available in 4 or 8 hour format)

Objectives: This training will: • Outline the fundamental rules of good business writing • Provide participants a hands-on opportunity to put the rules into practice • Offer assorted helpful "tips and tricks" • Be fun

Highlights: Now They Tell Me: What You Didn't Learn in School • Burning Your Brain at Both Ends: They Warned You, But... [Outlines and the Power of Organization] • The Secret of the Formula One Writing [Leaner, Lighter, and Long on Horsepower] • Sucked into the E-Mail Trap [Do's and Don't's of Good E-Mail] • The Strange Case of the Mysterious Mail [A Case Study] • I Can't Believe I Said That [An Editing and Rewriting Exercise]

Designed for: Anyone who needs to improve his or her writing especially anyone in a leadership role

Recommended CPE: 8
Prerequisites: Some familiarity with business writing
Event ID: SEVEN
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Greg Conderacci

Sharing Skills Between Generations

Mentoring is a hot topic in many organizations. The assumption is if mentoring is good, we should ensure it occurs. Underlying that assumption is a belief that experienced professionals have a lot to share with less-experienced professionals. However, mentoring is as much about chemistry and personality as it is about structure. Further, mentoring only from the top down does not capitalize on the opportunity for reciprocal mentoring: less experienced and usually younger professionals can bring valuable skills, knowledge and perspective to the more experienced professionals, who can then share their skills, experience and wisdom.

Objectives: Mentoring vs. coaching process • Learn to define the difference between skills and knowledge, and between knowledge and wisdom

Highlights: Complexity and new perspective, and its impact on individuals and organizations • Generational differences and how they can help individuals and organizations address change more effectively • Problem types and reciprocal mentoring • Missing pieces and building on strengths

Designed for: Professionals who want to further their own and/or their organization's growth and success

Recommended CPE: 8
Prerequisites: None
Event ID: RM
Course Level: Overview
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Situational Communication: How to Connect with More People More Often

How important is communication to the success of your employees? According to Tom Peters in "The Management Advantage," 82% of workplace problems are related to miscommunication.

Objectives: Become great communicators by minimizing misunderstanding, stress and personal frustration during the communication process

Highlights: Six ways to use voice and body language to create a more powerful impact • The difference between imagined problems and reality • The biggest communication mistake most people make and how to avoid it • Use relaxation and breathing techniques to calm nerves and reduce anxiety • Three quick and easy ways to connect with almost anyone • Two critical components involved in active listening • Perception in interpersonal communications • Effectively use questions • Connect with another person by practicing communication matching • When a lot of detail can hurt and when it can help • An easy-to-use technique to remember a person's name • Three ways to check to ensure the intended message was received and understood • How to really mean what you say and say what you mean in an assertive way that minimizes misunderstandings • Naturally and comfortably use eye contact, hand gestures and voice to become more confident

Designed for: All levels within an organization based on client needs

Recommended CPE: 8
Prerequisites: None
Event ID: BGC
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Ray Perry

Situational Delegation - Inspiring Accountability in Your Employees

How often do managers choose to do it themselves instead of delegate? How often do they micromanage solid employees and what does this do to employee/team motivation and morale?

Objectives: Learn skills that will give you more confidence and fewer problems in the delegation process • Get more done in less time, utilizing a more motivated team

Highlights: What is situational delegation and why is it critical • How to motivate employees to want to earn your trust with delegated work • The secret behind motivating "difficult" team members to successfully complete delegated projects on time, on target and with minimal follow-up • Delegate to all types of team members and still maintain control over the quality of the work • When to delegate an assignment that takes longer to explain than to do it yourself • Key rules for when to micromanage and when to macro-manage • Why clarifying expectations is an important problem solving/time management tool • Develop a simple management tool to keep track of delegated work and three strategic ways to manage it • How to overcome two delegation obstacles that get in the way • Four ways to minimize the "do it myself" syndrome • Go from me to we as a manager

Designed for: Professionals who need to successfully manage projects and teams

Recommended CPE: 8
Prerequisites: None
Event ID: DFR
Course Level: Overview
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Skillful Coaching: Careers and Performance Matter

Coaching requires focus, empathy, and skill and is built on conversations that can be challenging - especially when the coach wants to help someone develop or change to be more productive. This workshop gives coaches an opportunity to understand and practice conversation skills, feedback techniques, and assessing SMART goals. It helps define the role of a coach who is an active professional helping less experienced professionals learn and achieve.

Objectives: Develop a strategy for effective career coaching that builds on SMART goals and effective feedback • Demonstrate skills needed for effective performance and career discussions

Highlights: The benefits that employees receive when they achieve clarity and ongoing coaching • How to use coaching to align goals of individuals with the organization's overall strategy • Sharing expectations and suggestions that maximize opportunities to succeed

Designed for: Professionals who must coach others in performance and career development

Recommended CPE: 4
Prerequisites: Management experience
Event ID: SCCPM
Course Level: Intermediate
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Leadership Development Communications Skills
Author/s: Lin Kroeger, CMC

SMART Goal Setting: Setting Goals to Achieve and Contribute

Goal setting is key for individuals who want to ensure that they are setting the right priorities and having the right conversations about contribution and personal development at work. Too often, individuals set goals that demonstrate high aspiration but do not lead to "measurable" results, producing subjective discussions about achievement.SMART is an acronym used in many organizations to guide the setting of goals which contribute to a culture of accountability and conversation. This workshop introduces the use of SMART, the development of SMART goals, and opportunities to practice writing goals that strengthen the individual and the organization.

Objectives: Create SMART goals that will become part of an annual cycle of goal setting, development, and coaching/mentoring • Identifying the value of SMART goals as compared to general goals • Changing general goals to SMART goals

Highlights: Defining S.M.A.R.T. • Reviewing subjective goals and identifying how they put the individual at risk • Developing SMART goals that can enhance individual achievement and contribution

Designed for: Any professional who must define goals at work and wants to ensure their time is spent on high priority and personally/professionally relevant learning

Recommended CPE: 4
Prerequisites: Management experience
Event ID: SGS
Course Level: Basic
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Business Management
Author/s: Lin Kroeger, CMC

Smarter Decision-Making new

Business professionals need to be able to respond to today's rapidly changing business environment by making quick and smart decisions. This interactive course will help you understand and build decision-making, critical-thinking, and creative problem-solving skills. You will cover methods of assessing and resolving problems and learn to ask the right questions during the process.

Objectives: At the end of this course students will be able to: • Understand effective decision-making steps and tools • Apply creative problem solving techniques

Highlights: Effectively assess a problem situation • Distinguish between causes and symptoms • Define the true problem • Identify solution parameters • Develop create approaches to degenerate multiple options • Selecting the most feasible and effective solution • Creating implementation plans

Designed for: Anyone

Recommended CPE: 8
Prerequisites: None
Event ID: SMART
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Social Media for Accountants – Tools and Strategy new

Social media refers to the use of a variety of Web-based applications but it is nothing short of a revolution in the way we communicate and conduct business. This course will present an overview of current Web-based applications and current trends in social media, tips to avoid mistakes, security settings and how to take advantage of and incorporate useful tips into building a social media presence. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Define social media and understand its impact in your business communication • Setup and use the most popular social media tools (including Facebook, Twitter, YouTube, LinkedIn, etc.) • Understand the primary functions, security settings and advantages of using each tool • Understand how social media can impact your marketing process • Understand best practices with regard to the use of these tools

Highlights: Target your social audience • Setup social media applications • Identify important security settings • Socialize your web site and link to social media • Identify how to measure success of your social media efforts

Designed for: CPAs and Professionals at all levels of an organization

Recommended CPE: 4
Prerequisites: None
Event ID: SOCIAL-L
Course Level: Update
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Judith Borsher, CPA, MBA

Social Media Strategy & Quick Start: Developing and Implementing a Social Media Strategy for CPA Firms & Organizations

The MACPA is known for its thought leadership in the uses of social media in the CPA profession and has been featured numerous times in the national trade press and Journal of Accountancy. Now they are available to share their best practices and learning with CPA firms and organizations in a customized coaching process to help you develop and implement a strategy in ninety days. Each session will offer hands-on tips and techniques and a chance to get your questions answered.

Objectives: Develop a social media strategy designed to accelerate your personal and organizational brands • Increase your ability to connect to more people and manage more relationships • Understand how to use social media to share, discuss and manage information; as a tool for recruitment and retention; and for customer service and support • Know how to utilize a social media plan for increased findability on the web and for brand management

Highlights: How social media tools can benefit you and your organization and how to use them • How to stay on top of leading blogs using RSS and blog readers • Setting up and maintaining a blog • Amplify your message using other social networking (Linked-In, Facebook) and microblogging (Twitter) sites

Designed for: Thought-leaders and anyone with responsibility for, or interest in, corporate / firm communications, branding

Recommended CPE: 9
Prerequisites: Understanding of the Internet and computers
Event ID: SOCMED
Course Level: Intermediate
Format/s: Group Live
Field of Study: Social Environment of Business
BLI Curriculum: Communications Skills Business Management
Author/s: Tom Hood, CPA, CITP, Bill Sheridan, CAE

Sole Proprietor's Retreat

This new and innovative course is designed to provide sole proprietors with the benefits shared by larger firms. As a group, you will tackle the issues directly facing sole proprietors. You will help determine the agenda by using a survey that will let the instructors know what is most important to you. The survey results from each firm will form the basis for your experience.

Objectives: Tackle the issues facing sole proprietors • Learn how to move your firm forward • Enhance your personal and professional quality of life

Highlights: Financial Performance and Strategic Objectives: annual operating plan; goal setting; succession planning; retirement issues; increased regulatory complexity and work-Life balance • Implementing Value Pricing: how to compete on value not price; fixed price agreements; change orders; 100 percent money back guarantee and the necessity of pricing before work begins • Client Critical Success Factors: targeting; selection; grading; termination and retention • Measuring What Matters: selecting key predictive indicators; KPIs that provide a competitive advantage; staffing issues including: attracting, rewarding and retaining • Retreat Follow-Up: The group will reconvene via teleconference to evaluate your progress towards your annual plan objectives and individual firm changes.

Designed for: Any single owner of a CPA firm looking for an opportunity to move his or her firm forward and to enhance his or her personal and professional quality of life

Recommended CPE: 24
Prerequisites: CPA firm owner/partner
Event ID: SPRETRET
Course Level: Advanced
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development Strategic Management
Author/s: Ronald Baker, CPA

Special Delivery: Delivering Presentations to Sell Ideas Effectively

In a world of fast moving imagery, professionals must present well. Listeners expect to be kept interested in the material being presented, and are used to seeing polished and articulate speakers. This program provides an opportunity to develop personal skills in presenting with videotaped practice sessions. Participants will also practice how to manage question and answer sessions that give tough questioners time to probe ideas.

Objectives: Manage information for yourself and the listeners • Create energy around ideas so listeners remain interested in the presentation • Manage question and answer sessions to increase persuasiveness

Highlights: Practice sessions of presentations, videotaped and critiqued • Practice session on question and answer sessions • If participants attend "Designing presentations" the day before, they can practice delivering the presentations they've designed. If participants are attending the one day program, they will work with material that does not require extensive preparation

Designed for: Professionals who want to effectively deliver information in small and large meetings and/or in public settings

Recommended CPE: 8
Prerequisites: None
Event ID: PSIE
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Lin Kroeger, CMC

Strategic and Operational Planning and Forecasting

Winning plans are what every leader wants to deliver to his or her organization - but how This course offers a way to achieve this in a case study setting. The forces that can bring success, or failure, are identified and discussed so that leaders can avoid them - or use them to their advantage. A case study approach is used. (Available in 4 or 8 hour format)

Objectives: Put into practice the strategic and operational skills to effectively plan and forecast for success

Highlights: Identifying product and service concepts and their development cycles • How to understand the risks in your vision, mission and strategy • Identifying competitive threats and how to counter them

Designed for: Corporate Executives

Recommended CPE: 4
Prerequisites: Management experience
Event ID: SOPF
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Strategic Management
Author/s: Frank Ryan, CPA, MBA

Strategic Coaching - Growing Top-Notch Performers

Imagine if every member of your team were a perfect "10" in terms of skill and motivation. What impact would that have on team performance and morale, not to mention the quality of your workday? In this fast-paced workshop, participants will develop a strategy that will target key team members for coaching. The strategy will help participants to employ a set of customized best practices to ensure that targeted team members will significantly improve performance and move closer to "10."

Objectives: Employ a set of customized best practices to ensure targeted team members will significantly improve performance • Gain solid buy-in and commitment during coaching sessions by avoiding two key pitfalls • Implement a follow-up process that is driven by the coached employee

Highlights: A performance-based criterion to use for selecting coaching candidates • The do's and don'ts of initially communicating coaching intentions to selected employees • Three keys necessary for the success of any coaching plan • The "Liked Best/Next Time" feedback process

Designed for: Partners and Managers

Recommended CPE: 8
Prerequisites: Management experience
Event ID: SC
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Course Listing

Strategic Planning Facilitation: Developing the High Performance Organization

This unique and indispensable workshop offers a nationally recognized facilitator who will help you organize your next retreat or strategic planning workshop, and show you how to incorporate the latest trends and create a process to develop a shared vision and strategy for your organization. This is a high-energy, interactive session which will identify goals, alignment, and specific next steps to increase the dynamics and performance of your organization. (This course is also available in an 8-hour format.)

Objectives: Develop strengths, problems, opportunities and threats of strategic plan implementation • Create a shared vision of the future for the organization and develop a core ideology • Build "Five Bold Steps" to move the organization toward its vision • Create action and timeline needed for implementing a high-performance vision

Highlights: Professional issues and trends and their potential impact on your organization • Strategic planning as a tool for navigating rapidly changing times • Charting the environmental and competitive context of an organization • The importance of understanding the history and background of an organization

Designed for: Executive teams, managers and all support staff

Recommended CPE: 16
Prerequisites: Management or team experience
Event ID: SPF
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Strategic Management
Author/s: Tom Hood, CPA, CITP

Strengthen the Inquiry Skills You Need to Gather Audit Evidence

Recent developments in various auditing, regulatory and compliance standards have increased the importance of effective inquiry as a means of gathering sufficient and appropriate evidence to support conclusions. This course will provide tips and techniques for effectively gathering information needed from management, employees, and others - while maintaining and enhancing interpersonal relationships. We will also emphasize how to evaluate whether sufficient and appropriate evidence has been obtained to satisfy objectives of inquiry procedures.

Objectives: Upon completion of this course, participants will be able to: • Discuss the proficiencies needed to successfully conduct both effective and efficient inquiries as a means of gathering audit evidence • Explain how to construct effective questions to satisfy intended interview objectives • Describe how to manage conflict and other uncomfortable interview situations • Explain important "attentive listening" skills

Highlights: Overview of common uses of inquiry to satisfy various professional and regulatory standards and requirements • Potential traps and downfalls when relying on inquiry to support objectives • Structuring interviews for maximum effectiveness • Analyzing communications for clues of deception • Options for increasing the persuasiveness of information gathered through inquiry • Emphasizing the soft skills necessary to enhance and preserve interpersonal relationships

Designed for: Anyone who uses inquiry as a procedure to fulfill audit, attestation or compliance objectives

Recommended CPE: 4
Prerequisites: None
Event ID: INQ
Course Level: Basic
Format/s: Group Live, Webcast - 2 hour
Field of Study: Auditing
BLI Curriculum: Communications Skills
Author/s: Jennifer Louis, CPA

Strengthening Collaboration and Managing Conflict new

Differences between people are a major source of friction. Fortunately, it's possible to manage such differences so work relationships are enhanced, productivity is increased, and conflict is minimized.

Objectives: Learn how to interact with different behavior styles in a way that promotes collaboration and reduces the potential for conflict.

Highlights: Understand how value judgments impede our ability to work effectively with others • Recognize your own and others' behavior preferences • Learn strategies for dealing more effectively with those whose behavior style is different from your own • Recognize how over-utilizing your strengths can cause tension in relationships • Develop specific behaviors for minimizing relationship tensions and reducing conflicts

Designed for: All levels within an organization

Recommended CPE: 4
Prerequisites: None
Event ID: SCMC
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Sheila Birnbach

Success Leaves Clues: Career Strategies for New Professionals

Presented by leading thinkers in the profession and founders of VeraSage Institute, Ronald J. Baker and Daniel D. Morris, this course provides unique observations about the future of the profession along with what every emerging CPA needs to know now to thrive in the future.

Objectives: Learn the attributes of a true professional • Develop traits necessary for professional success • Improve problem solving skills: Formulating hypotheses and bringing order to chaos from information overload • Learn risk-taking, creativity, flexibility and independent thinking • Discover how to apply judgment rather than check list solutions • Build leadership skills • Understand how to make the transition from providing clients with deliverables to creating value • Gain an appreciation for how your colleagues learn

Highlights: The tectonic shift taking place in the economy • The transition from manual and service workers to knowledge workers • Characteristics successful CPAs have in common • The three types of Intellectual Capital: Human Capital; Structural Capital; and Social Capital, as well as negative forms of each • The U.S. Army as an example of a knowledge organization • Utilizing After Action Reviews • No firm is an island: Leveraging social capital and social media to create wealth and solutions for clients • Leaders are readers • The importance of having mentors, whether you know them or not • The art of rainmaking • Creating your own destiny: Developing a personal career plan • Education never stops: Life-long learning

Designed for: Any emerging professional determined to succeed in today's knowledge economy

Recommended CPE: 8
Prerequisites: None
Event ID: CLUE
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Ronald Baker, CPA

Successful Project Approval Using a Business Case new

You have a great idea that could improve your company's bottom line, but you can't seem to get any interest from the C-suite. Try using a business case - a tried and true method for presenting a project in terms that management can buy into. Learn how to prepare a business case for your idea starting with identifying risks and opportunities, cover alternative solutions, and finally present an implementation plan. Work in teams on a case study to practice the process and prepare a presentation.

Objectives: Identify the key factors influencing decision-making • Prepare a written business case • Prepare a presentation of the business case • Understand communication styles impacting effective presentations

Highlights: Identify the sections in a business case • Perform SWOT analysis for alternatives • Develop an implementation plan • Identify key stakeholders and champions • Learn to tailor presentations based on communication style

Designed for: Anyone who would like to learn how to successfully present an idea for approval

Recommended CPE: 8
Prerequisites: None
Event ID: SUCSPROJ
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Succession Planning: Developing Tomorrow's Leaders Today

Simply extrapolating the past is no longer adequate for firms when trying to anticipate the future. Strategic foresight does not attempt to forecast the future, but simply allows firms to understand key drivers that may result in plausible future scenarios and provides the tools to position them favorably regardless of which future(s) actually unfold. Participants will gain understanding on how their firm competes, be able to determine primary drivers on these competitive aspects and anticipate how these drivers will change during specific time-frames, and will review the best and worst-case scenarios for their company. The primary objective is for participants to leave as champions in their organizations for embracing the future.

Objectives: Examine competency-based leadership development strategy • Understand the structures and tools needed for on-going organizational leadership development

Highlights: Defining leadership roles and responsibilities • A competency-based approach to succession planning • Three levels of leadership development • Critical coaching requirements

Designed for: The CFO in conjunction with the C-Suite Executive Team; CFOs with their leadership teams; partners in public accounting firms

Recommended CPE: 2
Prerequisites: Strategic management experience
Event ID: DTLT
Course Level: Advanced
Format/s: Webcast - 2 hour
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development
Author/s: Alan Patterson

Sustainability Reporting new

Sustainability reporting is growing at a rate of 34% per year. Stay ahead of curve and learn what Sustainability is, why your organization's bottom line can benefit immediately, various reporting standards, and how your organization can get started today.

Objectives: Learn what "sustainability" means and why your stakeholders are interested • Understand the various reporting standards and methods of reporting

Highlights: Definition of sustainability • Business case for sustainability • Review of reporting standards • Different forms of reporting • Methodology to begin reporting

Designed for: Internal or external finance professionals interested in sustainability reporting

Recommended CPE: 4
Prerequisites: None
Event ID: SR
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Sustainability: Using the "Triple Bottom Line" to Increase Your Success new

Sustainability is here to stay! Learn how implementing sustainability initiatives will improve your efficiency, increase your innovation, and engage your employees. Incorporating sustainable strategies into your day-to-day operations creates a competitive advantage, enhances your brand, and benefits the bottom line.

Objectives: Develop a unique strategy to successfully incorporate sustainability into your organization that fits with its mission and operations. *Create an effective implementation plan to address both short-term and long-term goals

Highlights: Introduction to sustainability • Sustainability reporting and standards • The business case for sustainability • Identify goals using "backcasting" techniques • Prioritize initiatives for fit and success • Create key performance indicators (KPI) to measure progress • Step-by-step implementation plan • Communication and follow-up

Designed for: Individuals with an interest in sustainability and a desire to make a positive impact on the organization

Recommended CPE: 8
Prerequisites: None
Event ID: TRIPLE
Course Level: Basic
Format/s: Group Live
Field of Study: Mgmt Advisory Services
BLI Curriculum: Business Management
Author/s: Jennifer Elder, CPA

Team Development - Secrets Behind Building an Award-Winning Team

How cohesive is your team? Would others say there is a great deal of trust on your team or a great deal of frustration? In this interactive workshop, participants will step outside their role as team leader to diagnose and then prescribe solutions to problems and obstacles that are getting in the way of team productivity, communication and camaraderie. Using this as a backdrop, participants will then customize a set of strategies for leading their respective teams to increased performance and morale - while at the same time minimizing intra-team problems and friction.

Objectives: Diagnose and then prescribe solutions to problems and obstacles • Customize a set of strategies for leading teams to increased performance and morale • Minimizing intra-team problems and friction

Highlights: Gain insight into the group dynamics of teamwork • Learn the specific skills that create high-performance teams • Create a workplace that supports and encourages teamwork • Learn how to generate support and buy-in for key team initiatives • Customize communication strategies that build trust and support throughout the team

Designed for: Partners and Managers

Recommended CPE: 8
Prerequisites: Management experience
Event ID: TBEL
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Team Strategic Planning

If each team developed and managed a bottom-up strategic plan during the next twelve months, what impact would that have on your performance? What would that mean to employee morale and customer satisfaction?

Objectives: Develop a strategic plan that focuses on what matters most to the team, the organization and your customers • Develop an implementation plan to guide its efforts as it works to strengthen productivity, build morale and increase customer service

Highlights: Develop an initial strategic plan that compliments the efforts of the larger organization (if applicable) and guides success during the next twelve months • Develop a mission statement that will guide the future success of the team • Develop a vision statement, goals, objectives and a set of values for the team • Identify outcome-oriented performance measures that will define success for each goal • Develop a practical strategy to accomplish each objective • Complete an external factor assessment to identify potential threats to the plan's success • Learn to use an accountability matrix that defines who does what by when • Develop a realistic plan that outlines how the team will implement and manage changes to the strategic plan during the year • Complete a risk assessment to uncover potential obstacles to successfully implementing the plan

Designed for: Professionals in charge of strategic planning

Recommended CPE: 8
Prerequisites: Management experience
Event ID: TSP
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Things That Every CPA Need to Know About IFRS new

Whether you're in public or industry accounting, have a client base solely in privately-held companies, or work for a privately held business, the likelihood of an IFRS question being asked of you is increasing. This course offers basic knowledge that every CPA needs to know about IFRS.

Objectives: Participants will be able to: • Explain the structure of the International Accounting Standards Board • Describe the path to convergence between the IASB and the FASB • Discuss the current convergence projects and timeline for implementation • Discuss the current status of the SEC Workplan for IFRS implementation • Explain the differences between IFRS and IFRS for SMEs • Discuss the differences between US GAAP and IFRS as it concerns inventory, PP&E, leases, intangible assets, liabilities, impairment, and revenue recognition. • Analyze the differences between financial statements prepared under IFRS and US GAAP

Highlights: The function of the IASB in standard development • Convergence update • Update on SEC implementation of IFRS • IFRS for SME's adoption • Analyze major assets differences between IFRS and US GAAP • Comparison of financial statements prepared under IFRS vs. US GAAP

Designed for: Accountants, users, & preparers of financial statements

Recommended CPE: 4
Prerequisites: Knowledge of basic accounting
Event ID: NEEDIFRS
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Strategic Management
Author/s: Peter Margaritis, CPA, MAcc

Time Management for Improved Performance - The Discipline of Getting Things Done

It seems as if there's always too much to do and not enough time to do it. Imagine the impact on productivity if your employees learned how to better manage this situation! What would happen to their sense of control and accomplishment during the day? In this practical workshop, your employees will learn how to get more done in less time -- with less stress -- by upgrading their skills at managing multiple and sometimes competing priorities.

Objectives: Learn how to get more done in less time with less stress • Minimize the sense of confusion when there's too much to do • Decide what to focus on when given competing priorities • Develop a daily priority plan that factors in the unexpected • Develop a fail-proof follow-up system, so nothing falls through the cracks • Minimize procrastination and indecisiveness in order to become more productive • Identify and minimize time stealers during the day

Highlights: Which types of priorities to focus on during the day for maximum results • Why planning half the day can sometimes be better than planning the entire day • The sure-fire way to avoid an important major communication time-waster • Specific ways to effectively handle constant interruptions • Three steps for effective crisis management • How to confidently say no • Avoid the trap of attempting too much during the day

Designed for: All levels within an organization based on client needs

Recommended CPE: 8
Prerequisites: None
Event ID: TMIP
Course Level: Overview
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Course Listing

To Terminate or Not to Terminate: That is the Question new

The process of terminating an employee can be uncomfortable and anxiety-producing. Yet doing nothing about a terminable employee can damage the morale of an entire organization. If a termination is done incorrectly, it can leave your organization legally vulnerable. Learn how to determine when it is appropriate to terminate an employee and how to protect your organization.

Objectives: Participants will learn to: • Determine if and when to conduct a termination • Avoid wrongful discharge litigation • Ensure legal compliance

Highlights: Differentiate between voluntary and involuntary terminations • Develop progressive discipline procedures • Establish a 7-step termination checklist • Ensure a legally secure exit structure

Designed for: CEOs, Managers and Practice Owners, Human Resource Managers

Recommended CPE: 3
Prerequisites: None
Event ID: TERM
Course Level: Basic
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Performance Management
Author/s: Sheila Birnbach

Top 5 Ways to Get the Most Value for Your Audit Fees new

Audited organizations of all nature, size and complexity have a vested interest in successfully managing the financial statement audit process. Cost-effectiveness, timely financial reporting, minimizing organizational disruption, and other incentives can result from an effective and efficient financial statement audit. While there are certain factors that drive audit fees which are outside of the control of the audited entity, there are several ways for organizations to proactively get the most value for the cost of the audit.

Objectives: This course will discuss the key factors that impact an audited entity's ability to achieve the most value for the cost of the financial statement audit. Upon completion of this course, participants will better understand how to proactively work with the auditor's and improve their own financial reporting processes to minimize audit fees.

Highlights: Engaging in an open and robust dialogue with the external auditors • Understanding the factors driving audit risk, and audit fees as a result • Strengthening internal controls over financial reporting to reduce audit risk • Fulfilling client assistance requests for a more effective and efficient audit • Negotiating audit contracts

Designed for: Anyone involved with preparing for, assisting with, or otherwise overseeing the results of an entity's financial statement audit

Recommended CPE: 2
Prerequisites: None
Event ID: TOP5-W
Course Level: Basic
Format/s: Webcast - 2 hour, Self Study: Video On-Demand
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Train the Trainer - How to Make Learning More Meaningful

How effective are your trainers? Do they tend to inspire or do they put the people they train to sleep? If education and skill development are important strategic building blocks to your future growth, then this course will help your trainers develop the ability to make training stick.

Objectives: Help participants design and deliver effective training programs that assist employees in becoming more productive through education and skill development

Highlights: Incorporate interactive training techniques and methods to motivate learners to retain and apply training content • Effectively apply the strategy of flexible time points to ensure that training content complements time allotted for training • Successfully develop and use visual aids during training sessions • Effectively develop and use a customized training checklist and develop "what if" scenario plans for dealing with potential problems during the training program • Customize strategies and techniques for building confidence and strengthening skills in public speaking and training delivery • Develop key strategies for dealing with challenging questions, trainees and situations • Deliver a training module and receive "liked best/next time" feedback from other participants

Designed for: Managers and partners

Recommended CPE: 8
Prerequisites: Management experience
Event ID: TT
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Leadership Development
Author/s: Ray Perry

Training: How to Effectively (and Painlessly) Teach Your Staff

As an executive, partner, or manager, you know that training is vital. You're a firm believer in the importance of a knowledgeable staff whether its a CPA topic, a company message, or a professional development skill. But, training takes time and time is limited with the consequences being you deny your staff of their necessary training or you procrastinate and then ineffectively throw something together at the last minute. This course will review easy steps to create training sessions on any topic and show you how to efficiently and (relatively painlessly) avoid those scenarios and provide quality training. You'll receive fun, interactive activities that you can use with your staff.

Objectives: Avoid frustration by learning practical techniques to train staff whatever the topic or message • Discover how to train non-technical staff, as well as CPAs • Learn how to create exercises and activities that encourage your participants to apply and retain their new knowledge (adults learn by doing) • Understand how adults learn • Learn how to facilitate discussion

Highlights: The worst question you can ask in training • How to ask better questions • Tips on how to encourage interaction and participation • The special methods for creating the most effective program • How to keep participants interested • Using different mediums to appeal to different types of learners • How a brainstorming session is a unique type of training

Designed for: All

Recommended CPE: 8
Prerequisites: People who manage staff or people who need to train staff
Event ID: TRAIN
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

Transitions to Leadership new

Excellence in technical or financial skills does not automatically translate to excellence in supervising others. First-time supervisors face unique challenges as they transition to management: supervising work with which they may be unfamiliar, supervising employees with whom they had previously been co-workers or employees with greater seniority, understanding the extent of responsibility and decision making authority they have, wanting to be liked, finding ways to communicate expectations to their employees and making unpopular decisions. This workshop will help new supervisors to successfully navigate the transition.

Objectives: Participants will learn to: • Facilitate the transition to leadership • Overcome the challenges that are unique to first-time managers • Ensure the success of the first-time manager

Highlights: Differences between being a supervisor and being an employee • The working supervisor • Common problems faced by new supervisors • Recognizing myths that limit potential • Transmitting expectations • Delegating for effectiveness • Developing resources to facilitate the transition

Designed for: Those who are new to supervision and management as well as those aspiring to a management position

Recommended CPE: 3
Prerequisites: None
Event ID: TRANLEAD
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Sheila Birnbach

Trust Centered Selling: How to Attract and Retain Loyal Clients through Trusting Relationships

This course helps sellers of complex or relationship-based services build trusting relationships with their clients. In a highly interactive, hands-on session, participants learn the factors effecting trust and principles that will help them achieve higher profitability and higher revenues. This program is also available in a series of five, 1-hour Webcast sessions: Growing Your Business "The Power of Trusting Relationships" • "The 4 Components of Trust", "Creating Client Value" • "Listening to Build Trust" • "The Trust Selling Cycle"

Objectives: Learn the components that underpin trust between buyers and sellers and practical ways to build trusting relationships • Understand why trust is the most important factor in long-term sales results • Create value for clients • Listen and ask questions to enhance trust and differentiate ourselves • Be able to track and measure progress in our sales activity

Highlights: Intellectually challenging models, paradoxes and stories • Role-playing- both realistic and real-world examples • Customized cases about relationship management • The Financial Impact of Trust • The Trust Equation • Defining client value and how you can create it • The 5 Stages of The Trust Roadmap • The Red Velvet Rope Policy
Designed for: Anyone who sells complex products or services in a relationship context, including includes insurance, real estate, distribution, manufacturing, supplies, financial, accounting, legal, healthcare and pharmaceutical, IT services and other areas

Recommended CPE: 8
Prerequisites: None
Event ID: TCS
Course Level: Basic
Format/s: Group Live, Webcast – 1 hour (five 1-hour formats)
Field of Study: Personal Development
BLI Curriculum: Communications Skills
Author/s: Mark Slatin

Turning Trust into Value: Business Development Boot Camp

Course Listing

Turning Trust into Value: Business Development Boot Camp

Few professions can command the trust and respect of the CPA, and indeed the demand for CPA services has never been higher. At the same time, though, many CPA services are becoming commoditized and pressure on hourly rates is intense. It is also increasingly difficult to move choice business from competitors. Finally, firms and companies are finding the competition for talented employees can be more challenging than the competition for good clients. In short, successful firms must be able to translate trust into value to monetize and capitalize more successfully the benefits they offer.

Objectives: Provide practical tools that can be used immediately to build your practice

Highlights: The Value of Trust: How to increase trust in a skeptical world • Differentiating Your Firm: How to answer the prospect's most basic question, "Why should I do business with you" • Strategic Selling: A consultative approach you can use comfortably and effectively • Pricing Your Services: Breaking out of the tyranny of the billable hour • Customized Consulting: A session devoted to the specific sales and marketing challenges you face

Designed for: Practice leaders who want to enhance the profitability of their business through more productive sales and marketing

Recommended CPE: 20
Prerequisites: Experience in a leadership role
Event ID: BDCAMP
Course Level: Advanced
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Leadership Development
Author/s: Greg Conderacci

Understanding IFRS: A Hands-On, How to Approach

This timely course will help you become familiar with the major differences between IFRS and US GAAP and how this is likely to narrow in the coming years as convergence gathers momentum. The process and elections involved in transitioning from national GAAP to IFRS using IAS 1 will also be highlighted. Examine the specific major differences between GAAP and IFRS and gain awareness of how IFRS has developed a separate set of reporting requirements for non-public entities. Engage in practical case studies where concepts relating to IFRS are applied to everyday reporting issues. (Content can be customized to client needs)

Objectives: To understand the process by which IFRS will gradually supersede US GAAP and how this will change financial reporting. To provide participants with an overview of the major issues involved in understanding when, where and how IFRS will alter their financial statements.

Highlights: An overview of IASB and the standard setting process and progress toward convergence with US GAAP • How the underlying politics are shaping the process of harmonization. • What are the major differences between US GAAP and IFRS? • How do we get there? First time adoption of IFRS • Major unsettled issues – the current state of play • IFRS for private entities • IFRS guidance for selected areas

Designed for: Accountants in public practice and industry who need to understand the movement toward IFRS and how it will affect their clients and their practice

Recommended CPE: 8
Prerequisites: None
Event ID: UIFRS
Course Level: Update
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Ray Thompson, CMA, CFM, CBA

Understanding International Financial Reporting Standards (IFRS) from a U.S. GAAP Perspective

This course is designed to provide a comprehensive review of the major differences between U.S. GAAP and International Financial Reporting Standards (IFRS) at both the principle and rule levels. 6 - 14 hours.

Objectives: Understand the major differences between U.S. GAAP and International Financial Reporting Standards (IFRS) • Review current convergence projects

Highlights: Overview and Background of IFRS: A brief history of international accounting standards • Operating Assets: Inventories; Property, plant and equipment; Impairment; Assets in use; Assets held for sale • Liabilities and Contingencies • Off-Balance Sheet Transactions • Business Combinations and Consolidation Procedures • Accounting Policies and Disclosures: Segments; Earnings per share • Financial Instruments, Derivatives and Hedging • First-time Applicaton of IFRS: Overview of the allowed alternatives; Selection of IFRS accounting policies; Preparation of opening balance sheet: the starting point for subsequent accounting; Determination of estimates for opening B/S and other periods presented; Presentation and disclosure in the first IFRS financial statements (and interim reports)

Designed for: Anyone associated with the preparation or auditing of financial statements; financial analysts

Recommended CPE: 6
Prerequisites: None
Event ID: UIFRSGAA
Course Level: Intermediate
Format/s: Group Live
Field of Study: Accounting (Gvmt)
BLI Curriculum: Business Management
Author/s: Thomas Selling, Ph.D., CPA

Using Business Valuations to Keep Your Clients Loyal

Accountants often struggle to get clients to see them as "trusted advisors" instead of just tax preparers. The reward for succeeding is client loyalty and increased practice profit margins. This course will teach you how to utilize business valuations so clients see you as a value-added problem solver - whether or not you do business valuations yourself. (can be 1 hour keynote; or 2 - 4 hours)

Objectives: Learn how to use business valuations to position yourself as a value-added "problem solver"

Highlights: Why business owners so often misjudge values and how not knowing hurts them • A simple, non-threatening way to "raise the valuation issue" • How a valuation reveals an owner's financial and planning needs • How the valuation process positions you as a "problem solver"

Designed for: Accountants whose clients include business owners

Recommended CPE: 1
Prerequisites: None
Event ID: LOYAL
Course Level: Basic
Format/s: Group Live
Field of Study: Accounting
BLI Curriculum: Business Management
Author/s: Brad Davidson

Using Social Media for Lead Generation

Successful firms have discovered that by using social media, they have enhanced their search engine rankings, become more appealing to recruits and have connected to the next generation of clients. Learn how to use free social media platforms to drive prospects to your firm.

Objectives: This course will give you the knowledge of the strategic and tactical ways to identify, set-up, monitor and calibrate the variety of social media tools to drive quantifiable business to a CPA firm. We will also discuss social media usage firm policies.

Highlights: Using and understanding: • Google • LinkedIn • Facebook • Twitte • FourSquare and other emerging tools for lead generation • Social media policy creation

Designed for: Anyone interested in learning how a CPA firm can generate business from social networks

Recommended CPE: 2
Prerequisites: None
Event ID: SOMELEAD I
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communication Skills, Strategic Management
Author/s: Andrew Rose

Value-Added Internal Control Communications that Comply with the Standards - Detailed Analysis and Case Studies

In the past, internal control communications were often an afterthought to the audit. However, recent changes to the Statements on Auditing Standards (SASs) have made identifying and communicating weaknesses in internal controls around reliable financial reporting noted during the course of the audit, a presumptive requirement. Making value-added internal control communications a higher priority on audit engagements can have many benefits, including: improving client relations, proactively preventing, future audit issues and making audits more interesting by forcing engagement team members to view clients with a business advisory perspective that includes operational effectiveness and efficiency. (Also available in a 4-hour Overview)

Objectives: Explain why recent changes to the SASs are justified in giving value-added internal control communications a higher priority on the audit • Develop well-written internal control deficiency comments

Highlights: Recent changes to the SASs related to identifying and communicating internal control matters through the course of the audit • How to identify value-added internal control deficiency comments, with an emphasis on smaller companies • The basic steps in developing and writing a strong deficiency comment • How to get the entire team to contribute ideas • Case studies on identifying deficiency comments based on real-life scenarios • Exercise in writing and critiquing real deficiency comments

Designed for: Any auditor who wants to better understand the impact of recent changes to the SASs
Recommended CPE: 8
Prerequisites: Auditing/Internal Control
Event ID: MLC8
Course Level: Intermediate
Format/s: Group Live
Field of Study: Auditing
BLI Curriculum: Business Management
Author/s: Jennifer Louis, CPA

Virginia CPA Ethics Training

This course, taught by Don Paris, CPA, is a comprehensive two-hour program that satisfies the Virginia State Board of Accountancy's ethics requirements, helping Educate CPAs in the ethics of the profession.

Objectives: Comply with VA State Board of Accountancy requirements for topics dealing directly with professional ethics and conduct

Highlights: VA State Board of Accountancy latest pronouncements

Designed for: All licensed CPAs in the state of Virginia

Recommended CPE: 2
Prerequisites: None
Event ID: VCET
Course Level: Basic
Format/s: Group Live
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Donald Paris, CPA, MST

Virginia, DC and Maryland CPA Ethics Training

This course is a comprehensive four-hour program that satisfies the Virginia, DC and Maryland State Board of Accountancy ethics requirements, helping Certified Public Accountants to educate themselves in the ethics of the profession, specifically the Rules of Professional Conduct

Objectives: Comply with MD State Board of Accountancy requirements for topics dealing directly with professional ethics and conduct • Comply with VA State Board of Accountancy requirements for topics dealing directly with professional ethics and conduct • Comply with DC State Board of Accountancy requirements for topics dealing directly with professional ethics and conduct • Understand rules of professional conduct

Highlights: MD State Board of Accountancy latest pronouncements • VA State Board of Accountancy latest pronouncements • Rules of Professional Conduct

Designed for: All licensed CPAs in the state of Maryland, DC, and in the state of Virginia.

Recommended CPE: 4
Prerequisites: None
Event ID: MCEVCET
Course Level: Basic
Format/s: Group Live
Field of Study: Ethics - Regulatory
BLI Curriculum: Strategic Management
Author/s: Donald Paris, CPA, MST

Web 2.0: Less Hype, More Help

Web 2.0 is no fad. It has broken new ground in the way businesses communicate with clients, customers, employees and each other. Blogs, podcasts, wikis, social networks and virtual worlds are accepted - and in many cases, expected - communication tools for large and small organizations alike. Which of these tools might work for your business ... and which should you avoid Explore the possibilities here.

Objectives: Learn how Web 2.0 applications might give your communication efforts a modern boost • Know where to start and which tools offer the most bang for the Web 2.0 buck

Highlights: Explore the pros, cons, best practices and keys to success for business blogs, microblogs, podcasts, wikis, social networks and virtual worlds

Designed for: Anyone with responsibility for, or interest in, corporate communications

Recommended CPE: 2
Prerequisites: None
Event ID: WEB20
Course Level: Basic
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Business Management
Author/s: Bill Sheridan, CAE

The Well Compensated Mother: Strength-based Leadership Strategies for the Working Mother

An interactive and hands-on workshop designed to explore the art and science of thriving while being a hardcharging, smart, professional and loving working mother capable of inspirational leadership in both professional and personal domains.

Objectives: To instill hope and optimism in the super busy women of the "2000s" that they can successfully manage mothering and leading in the corporate world • To de-bunk the mothering myths that undermine our efforts • To define what it means to be the hub of a network, the challenges and opportunities that come with that role • To explore the evidenced-based approaches to centered leadership, at home and at work, i.e., daily practices that make a difference in well-being • To identify specific strategies for apply mothering skills in an organizational context

Highlights: The 10 mothering skills that transfer to the C-suite • An introduction to the lastest research on "happiness" and why not to puruse it • A fresh perspective on what it means to be a working mother: advantage vs anchor • A uniquely female learning opportunity to explore next steps in your pesonal leadership journey with like-minded individuals

Designed for: Women leaders who are looking for fresh perspective and new strategies

Recommended CPE: 4
Prerequisites: Professional working mother
Event ID: MLW
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Gretchen Pisano

What Next? Inventing a New Niche for Yourself

Perhaps it happened suddenly, perhaps it happened gradually, but what you used to do to succeed isnt succeeding any more. A weaker economy, stronger competition, a merger or acquisition, an advance in technology or just plain boredom all can make you want to change your career, your companys business or your practices focus. But how do you do that? This highly interactive course will reveal to you how the process goes from the inside out and offers many "hands on" exercises.

Objectives: Discover how to be creative about who you are, innovative about how you redefine what you do in a new area, and be clear about how you re-package yourself and your firm or practice • Identify a variety of proven business and personal methodologies and some of your creativity - to help you chart new strategies for success

Highlights: Who are you • Clarifying your identity and that of your company, your firm or your practice • Where are you going Hunting for a new destination: A Blue Ocean of opportunity amid the highly competitive red oceans where youre swimming • How do you market it Selling your idea to partners, employees, investors, clients and customers

Designed for: Leaders and others who want to regain a competitive edge in a new area or field

Recommended CPE: 4
Prerequisites: None
Event ID: INVENT
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Strategic Management
Author/s: Greg Conderacci

When Debits Don't Equal Credits (for Professionals and Industry)

This course is different--radically different. It is designed to generate thinking and discussion among colleagues about the significant changes, trends and demographics facing the future of our chosen profession. It is offered in the spirit of collegiality to current and future leaders of the profession who want to have an impact beyond the existing year's bottom line.

Objectives: Explore the major trends already altering the future of the profession • Examine the immutable future demographics and why the war for talent will increase • Learn why the current accounting model is in need of renovation and innovation • Understand the three alternative paths the profession can go down, and why its destiny is in the hands of today's leaders

Highlights: A brief history of the accounting profession • What is means to be a professional • The Old Practice Equation vs. the New Practice Equation • The gap in GAAP, the invisible balance sheet, and why debits don't equal credits in an intellectual capital economy • Why canaries are more valuable than accountants--leading versus lagging indicators and the Alternative Financial Reporting Model • What economists have to say about the value of an audit, accounting and regulatory reform, and the promulgation of accounting standards • Demographic and international trends in the profession • Commoditization, outsourcing, and emerging growth services in the profession

Designed for: Any CPA in public or private practice in search of a dynamic and thought-provoking course about the future of their profession

Recommended CPE: 8
Prerequisites: Management experience
Event ID: WDDEC
Course Level: Intermediate
Format/s: Group Live
Field of Study: Business Mgmt & Organization
BLI Curriculum: Business Management
Author/s: Ronald Baker, CPA

When Disaster Strikes, Will You Be Ready? new

Every organization is susceptible to crises such as natural disasters, financial misconduct and public relations fiascos. Whether it is your organization or the organizations of the clients you serve, a disaster recovery plan is essential. This workshop will prepare you for crises, discuss the three fundamental approaches – prevention, mitigation and recovery – and provide tools to manage operations in times of crisis.

Objectives: Participants will learn to: • Recognize common risks • Organize an emergency plan • Manage crises internally and externally • Facilitate the recovery of your business • Decrease the psycho-social impacts • Decrease losses

Highlights: Discuss the three types of crises, • Conduct a risk identification and rating assessment, • Learn the six types of impacts • Develop a crisis response plan • Designate and train a crisis spokesperson

Designed for: Industry, practice or firm leaders and operations managers

Recommended CPE: 3
Prerequisites: None
Event ID: DISASTER
Course Level: Basic
Format/s: Group Live
Field of Study: Administrative Practice
BLI Curriculum: Business Management
Author/s: Sheila Birnbach

Why Don't We Say Yes? 21st Century Negotiating new

This practical, interactive course prepares participants to negotiate using traditional skills adapted to today's realities. It focuses on proven, fundamental principles of negotiating while considering game-changing issues like globalization, trust, culture, technology, brain science and even political correctness. In particular, it helps participants understand why people say no when they should say yes and vice versa.

Objectives: Changing times demand changing approaches. The business world is more diverse, global, connected and complex than ever. Also, we know more about how people "tick" – mentally and emotionally. This course brings that knowledge to bear against the new challenges – and helps generate better negotiation outcomes.

Highlights: Why does traditional negotiation fail? • It emphasizes manipulation – the use of power • It assumes there are right and wrong "formulas" or words • It assumes everybody is alike • It ignores cultural, demographic and gender differences • It ignores differences in personality, experiences and needs

This course assumes negotiation is about… • Meeting needs • Listening and discovery • Tracking energy flows • Understanding what's in your negotiation "partner's" head – and yours • Building trust

Designed for: Anyone who might find themselves in negotiations, especially anyone in a leadership role

Recommended CPE: 4
Prerequisites: Negotiation/Relationship building experience
Event ID: 21CNEG
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills Business Management
Author/s: Greg Conderacci

Why We Stray: A Different Look at Ethical Decision-Making

What was he thinking? Have you ever wondered that in the wake of an ethical breech by a previously respected person? Often, the unethical action is hard to believe much less explain because the conditions that contribute to unethical behavior are far from clear. These subtle factors are the "danger zones" that ethical practitioners - and especially leaders - need to recognize in themselves, their firms and their clients. This course explores the tangled paths to ethical problems. It is designed to sensitize you to the subtle traps and to suggest strategies to avoid or extricate yourself from them - whether they are internal, cultural, organizational or societal.

Objectives: Be able to recognize the factors that are the catalyst for unethical behavior and learn strategies to avoid them

Highlights: "The Amygdala Made Me Do It" - Adventures Along the Brain's Low Road • "That's Not the Way We Do It Here" - Classic Cultural Pitfalls • "How Do You Know That" - The Assumption Trap • Fear, Confusion, Hesitation and Surprise: The Four Poisons of the Mind • Step by Step into the Big Muddy - The Vietnam Syndrome • Paving the Path to Hell: Unintended Consequences • "This Phone Call Never Happened" - Confidentiality and Secrecy

Designed for: Anyone who might wrestle with ethical issues, especially anyone in a leadership role

Recommended CPE: 4
Prerequisites: None
Event ID: STRAY
Course Level: Update
Format/s: Group Live
Field of Study: Ethics - Behavioral
BLI Curriculum: Strategic Management
Author/s: Greg Conderacci

Why You? Positioning Yourself Ahead of the Pack

This course enhances your ability to market your practice successfully by developing or focusing your brand identity - and putting it to work for you. A strong practice identity is your best sales asset. This program is designed to help begin or improve your marketing efforts - without the cost of expensive advertising or public relations firms. (This course is also available in a 4-hour format.)

Objectives: Gain a hands-on experience that you can use immediately • Combines proven marketing, organizational development and strategic planning techniques in an easy-to-use format

Highlights: Quick develop or focus your firm's brand • Incorporate your brand message into your marketing efforts • Use your brand in the strategic planning process • Tools to help your team reach consensus around brand development • Marketing tactics, tips and tricks

Designed for: Industry, practice or firm leaders, planners and marketing officers

Recommended CPE: 8
Prerequisites: None
Event ID: WHAT
Course Level: Overview
Format/s: Group Live
Field of Study: Marketing
BLI Curriculum: Leadership Development Strategic Management
Author/s: Greg Conderacci

Will the Audience Throw Eggs? - How to Present with Professionalism & Pizzazz

As a CPA, you will inevitably give presentations. The level of formality may vary from informal staff meetings to formal Board of Director meetings. The size of the audience may vary from three people for an audit to 300 people for a company-wide briefing. In every situation, the audience will judge your credibility as a CPA (and as a manager or executive) based on your ability to present. You need to be prepared.This course will review techniques for both the beginner and intermediate speaker, and show you how to give polished presentations with professionalism and pizzazz. The instructor will create a comfortable, fun learning environment.

Objectives: Overcome nervousness and appear confident • Understand the importance of sharing stories and examples • Become a polished speaker by learning practical techniques for telling stories • Preparing efficiently and balancing your time

Highlights: Presenting with confidence • Specific techniques to get (and keep) the audiences attention • Recognizing the similarities and differences between small and large group presentations • Sharing stories and examples (people remember stories when they remember nothing else) • Informal versus formal presentations

Designed for: All

Recommended CPE: 8
Prerequisites: People who give presentations or lead meetings
Event ID: PIZZAZ
Course Level: Intermediate
Format/s: Group Live
Field of Study: Communications
BLI Curriculum: Communications Skills
Author/s: Kelly Watkins

Winning New Business - It's in the DNA

Nobel laureate, Francis Crick, said, "James Watson and I were able to discover the structure of the DNA molecule because we were the only people in the hunt who didn't know what it was supposed to look like. "Think about how the most successful salespeople are those who are able to suspend the tendency to make assumptions about client needs. Winning business is not about positioning your firm, but about engaging in a strategic dialogue with, listening to, and understanding the client better than any of your competitors. With this engaging and humorous presentation, you will discover a different kind of DNA-the Deliberate Needs Analysis, in which learning about the prospect becomes more important than telling your story.

Objectives: Know the difference between a need and a solution • Understand that good questions are better than good answers • Mastering active listening as a critical differentiator • Learn a few techniques to improve your listening skills

Highlights: Achieving leverage through better meeting preparation • Understanding the elements of a strong relationship to drive behavior • Developing approaches and techniques to ask the tough questions • Simulations of real-world engagements

Designed for: All

Recommended CPE: 8
Prerequisites: None
Event ID: DNA
Course Level: Overview
Format/s: Group Live
Field of Study: Marketing
BLI Curriculum: Business Management
Author/s: Robert "Hap" Cooper

Word (2007 & 2010) and PDF Productivity Features for CPAs

This course will cover editing, formatting, security and new Adobe Acrobat PDF packaging features as well as integration of Excel data and charts into Word. Participants will learn about file compatibility issues with earlier versions of Word and how to save time with many quick tips. (Format choices: "Lecture only with live demo" or "hands-on, participants bring laptops")

Objectives: Be able to use document reviewing techniques effectively • Collaborate electronically with colleagues and clients • Review important editing features for documents and forms • Know how to maintain document security • Understand new file formats and backward compatibility issues • Learn to maintain a link for information originating in Excel

Highlights: Use the new tri-pane review panel to quickly identify differences between two documents • Use the new interface to merge changes by multiple reviewers • Track changes to protect and manage review edits • Clear markups for document security before sending a document • Protect a document from unauthorized changes • Package a single document or multiple documents in a PDF • Use forms in Word and Adobe Acrobat • Explore forms with fill-in fields • Setup shared templates • Copy and link Excel ranges and graphs into a document • Hyperlink a document to an Outlook email message • Import/export lists and contacts between Word, Excel, and Outlook • Use time-saving editing features • and more

Designed for: CPAs and Professionals at all levels of an organization who prepare and review content in business documents

Recommended CPE: 8
Prerequisites: Basic knowledge of MS Word
Event ID: WORD-L
Course Level: Update
Format/s: Group Live
Field of Study: Specialized Knowledge & Application
BLI Curriculum: Business Management
Author/s: Judith Borsher, CPA, MBA

Wrongful Termination Claims are on the Rise - Are You Protected? new

Unlawful termination lawsuits are the #1 form of litigations against organizations. A recent New York Times article reported that, as more workers are losing their jobs, more people are charging they have been unfairly or improperly dismissed. Even employers in "at will" states are finding that the "at will" provisions cannot protect them from costly litigation or out-of-court settlements..

Objectives: To implement employment practices that protect organizations from unlawful conduct • To ensure all processes have been followed prior to conducting a terminatin • To enable managers to feel more comfortable when conducting a termination • To follow the necessary post-termination procedures

Highlights: Practices to protect you in hiring, implenting employment policies and documentating behavior • To terminate or not to terminate – that is the question • Knowing when to terminate • Conducting the termination • Post termination considerations

Designed for: CEOs, Managers and Practice Owners, Human Resource Managers

Recommended CPE: 2
Prerequisites: None
Event ID: WTC
Course Level: Basic
Format/s: Group Live
Field of Study: Personnel/HR
BLI Curriculum: Business Management
Author/s: Sheila Birnbach

Your Strengths, Your Management Talent, Your Leadership: Making a Difference for You and Others

Management wisdom today suggests that we should manage ourselves and others based on the respective strengths of each. Do you know what your strengths are• Can you recognize others strengths• This workshop will introduce frameworks for identifying your own strengths and those of others, and will show you how to use that knowledge to move from self management to management to a leadership position.

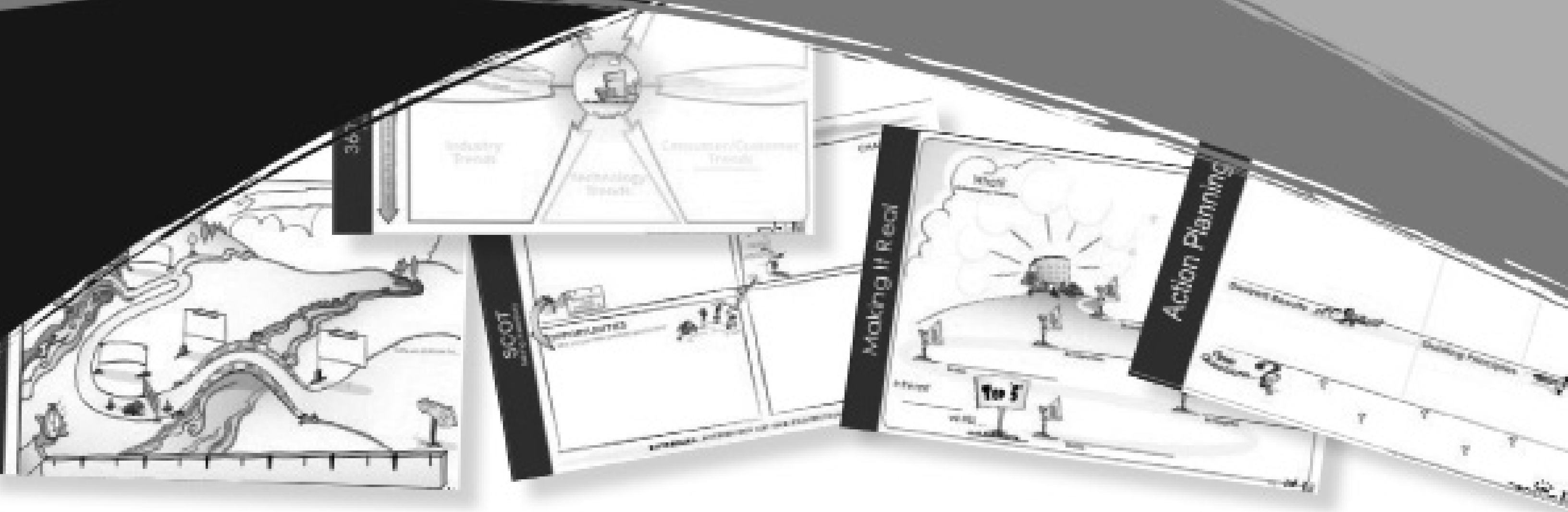
Objectives: Identify personal strengths using the Whole Brain Assessment • Refine your personal strengths assessment and use it to develop management and leadership strategies • Develop a competency profile and a development plan for increasing the power of your personal strengths

Highlights: Online assessment of your personal strengths and preferences using the Whole Brain assessment • Opportunity to identify personal strengths and develop a plan for focusing on them at work, as a manager, and/or as a leader

Designed for: Professionals who want to identify and develop their personal strengths based on an understanding of what they do best

Recommended CPE: 8
Prerequisites: We suggest participants take the course "Emotional Leadership" before or after this workshop to explore further concepts of self-management
Event ID: SMLT
Course Level: Basic
Format/s: Group Live
Field of Study: Personal Development
BLI Curriculum: Leadership Development
Author/s: Lin Kroeger, CMC

BLI Insights to Action™ Strategic Thinking System



Creative process design and facilitation

Communicate ideas clearly and effectively

BLI Insights to Action™ Strategic Thinking System supports leaders in accelerating their rate of learning and their organization's ability to adapt to rapid change. To change **what** people are thinking about, and more importantly, **how** they are thinking, we have to change the tools we are using to do the work. We have to create "smart processes" that support organizational change.

A BLI Smart Process™ that:

- Focuses on the rigor of the process and quality of thought
- Draws on both verbal and visual facilitation techniques
- Teaches skills beyond the subject matter
- Results in engaging communication tools
- Can be facilitated internally or externally

Whether hosting a world cafe for 1,000 people or a senior leadership retreat for four, designing conversation to be successful is an art and a science in itself. Learn how to facilitate strategic dialogue and synthesize masses of information into coherent patterns of meaning.

The BLI Insights to Action™ Strategic Thinking System includes:

- A series of large format visual tools
- On-site facilitation by certified Insights to Action moderators
- Train-the-trainer sessions
- Facilitator's Guide for internal facilitators.

For more information regarding the **BLI Insights to Action™ Strategic Thinking System**, contact Laura Dorsey-Shaner at Laura@bizlearning.net or 888-481-3500.

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Notes

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