



K2 Tech Conference

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Technology Conference with K2 Enterprises (2 days)
June 1-2, 2023

This conference will be presented in a virtual format.

2023 Technology Conference for Accountants Sessions at a Glance

Thursday, June 1

7:45 - 8 am - Log-in

8 - 9:40 am - General Session | **Tech Update 2023**

9:55 - 11:35 am - Morning Breakout Sessions (Choose 1)

- CPA Firm Update
- Now Is The Time To Automate!
- Using OneNote More And Email Less

11:35 am - 12:30 pm - Lunch

12:30 - 2:10 pm - Afternoon Breakout Sessions (Choose 1)

- Collaboration – Portals, Payments, And Signatures
- Shredding Your Servers And Going Virtual
- Taking Another Look At PDFs

2:25 - 4:05 pm - General Session | **The Best Kept Secrets Of Microsoft 365**

Friday, June 2

8 - 9:40 am - General Session | **Ripped From The Headlines –
Outrageous Tales Of Cybercrimes**

9:55 - 11:35 am - Morning Breakout Sessions (Choose 1)

- Accounting Solutions And Add-Ons For Small Businesses
- The Digital Home
- Top Ten Outlook Tips

11:35 am - 12:30 pm - Lunch

Afternoon Breakout Sessions

12:30 - 1:20 pm (Choose 1)

- Accounting Solutions: Mid-Market
- Simplifying And Economizing Your Tech Stack
- Six Essential Teams Features

1:30 - 2:20 pm (Choose 1)

- Kicking It Up A Notch With KPIs
- Understanding Your Ransomware Risk
- OneDrive's Best Practices

2:35 - 4:15 pm - General Session | **Ten "Must Know" Features In Excel**

ABOUT THIS CONFERENCE

CPE credit: Up to 16 hours in various fields of study

Course developer: K2 Enterprises

Prerequisites: Fundamental knowledge of hardware, software, and technology trends

Program level: Update

Advance preparation: None

Instructional delivery method: Group Study

Who should attend: Busy accounting and financial professionals who want to improve their personal and organizational productivity.

DAY 1

General opening 1st day

Tech Update

Major Topics

- Hardware and software trends
- Communication and collaboration tools
- Key products to consider for implementation
- Emerging technology in accounting automation, metaverse, and blockchain

Breakout 1st day morning

CPA Firm Update

Major Topics

- Trends in the profession, including supplier changes
- Software products by service lines
- Innovation and automation tools
- Specific technology stacks to improve productivity and profitability

Now Is The Time To Automate!

Major Topics

- Where to begin your automation journey
- Which automation tools should you initially focus on
- How to automate everyday tasks in accounts payable, banking, and approval workflows
- Common automation pitfalls

Using OneNote More And Email Less

Major Topics

- Using OneNote as a powerful reference resource
- Learn how to move your emails into OneNote
- Share OneNote with a group of people and communicate within a notebook rather than email

Breakout 1st day afternoon

Collaboration – Portals, Payments, And Signatures

Major Topics

- Portals as collaboration enablement
- Learn about payment options you can integrate into your portal
- Leave with a checklist of features to consider for collaboration

Shredding Your Servers And Going Virtual

Major Topics

- The similarities and differences in desktops managed by a managed service provider, a desktop/application hosting company, and a browser-based cloud
- Regulatory requirements like HIPPA, GLB, PCI, and more
- Practical tips for dealing with service providers

Taking Another Look At PDFs

Major Topics

- Understanding the Portable Document Format
- Identifying tools you can use to work with PDFs
- Collaborating using PDFs
- Creating, distributing, and collecting fillable PDF forms
- Using PDFs to enhance security

General closing 1st day

The Best Kept Secrets Of Microsoft 365

Major Topics

- New features and tips and tricks in Microsoft 365
- Learn how to take advantage of optional services like Bookings, Shifts, Information Rights Management, and Approvals
- See some of the tools you can activate to help your team create and share video content intended only for internal use

DAY 2

General opening 2nd day

Ripped From The Headlines – Outrageous Tales Of Cybercrimes

Major Topics

- Common security weaknesses which occur with hardware and software at home and in the office
- Malware, ransomware, data breach, and incident response tips
- Internal control failures that resulted in the theft of assets or unauthorized manipulation of data
- User authentication and security awareness training

Breakout 2nd day morning

Accounting Solutions And Add-Ons For Small Businesses

Major Topics

- Overview of small business accounting solutions
- Strengths and shortfalls of various accounting and add-on solutions
- Setup and configuration tips

The Digital Home

Major Topics

- Configuring your router and network to make it more secure
- Review online services to help your family share information and stay in touch
- Take advantage of the latest home gadgets and devices from CES 2023 and understand what technologies are “ready for prime time” and which ones you should skip

Top Ten Outlook Tips

Major Topics

- Action your email with more than just a flag
- Working more efficiently by structuring your screen better, creating shortcut buttons, using Categories, creating Search folders, and using boards
- Store emails in better places so you can reference them faster
- Stop typing and use templates instead

Breakout 2nd day afternoon 1

Accounting Solutions: Mid-Market

Major Topics

- Overview of mid-market solutions
- Probable third-party solutions required
- Accounting solutions for specific industries
- Specific strategies to use in selecting a system
- Guidance on preparatory steps and conversions

Simplifying And Economizing Your Tech Stack

Major Topics

- Taking an inventory of installed applications and tools
- Identifying the tech tools you need and those you don't
- Canceling unnecessary licenses and subscription services

Six Essential Teams Features

Major Topics

- Learn how to set up Teams for successful collaboration
- Create a filing system that does not include endless sub-folders
- Manage staff delegation and follow-ups with ease
- Define what Lists need to be available to your Team
- Discover how to create automatic Flows that can notify others of update
- Utilize survey Forms or questionnaires from within Teams

Breakout 2nd day afternoon 2

Kicking It Up A Notch With KPIs

Major Topics

- Types of KPIs
- How to look for data in your existing systems
- The basics of data prep tools
- Tools for tracking and reporting on KPIs

Understanding Your Ransomware Risk

Major Topics

- Understanding how ransomware can cripple a business
- Trends in ransomware attacks
- Best practices for minimizing ransomware risk

OneDrive's Best Practices

Major Topics

- Navigating to OneDrive on the web
- Synchronizing your files to your desktop pc
- Working with shared files
- Managing different versions of files
- Understanding how OneDrive works with OneNote, Teams, and SharePoint

General closing 2nd day

Ten “Must Know” Features In Excel

Major Topics

- Best practices for working with large volumes of data
- How to securely and efficiently collaborate with others
- Using Excel for optimization scenarios
- Creating “audit trails” in Excel
- Define “dynamic arrays” and list examples of their benefits