### Sunday, May 19, 2019

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00 - 3:00 p.m.</td>
<td>Complimentary Site Audits – Please Contact Your CSR to Schedule</td>
</tr>
<tr>
<td>3:00 - 6:00 p.m.</td>
<td>Registration</td>
</tr>
<tr>
<td>5:30 - 7:00 p.m.</td>
<td>Welcome Reception</td>
</tr>
</tbody>
</table>

### Monday, May 20, 2019

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>7:00 - 8:00 a.m.</td>
<td>Continental Breakfast / Registration</td>
</tr>
<tr>
<td>8:00 - 8:50 a.m.</td>
<td>Opening Remarks</td>
</tr>
<tr>
<td>8:50 - 9:40 a.m.</td>
<td>Keynote Speaker</td>
</tr>
<tr>
<td>9:40 - 10:00 a.m.</td>
<td>Session Break / Vendor Showcase</td>
</tr>
<tr>
<td>10:00 - 10:50 a.m.</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>10:50 - 11:10 a.m.</td>
<td>Session Break / Vendor Showcase</td>
</tr>
<tr>
<td>11:10 - 12:00 p.m.</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>12:00 - 1:00 p.m.</td>
<td>Lunch Break</td>
</tr>
<tr>
<td>1:00 - 1:50 p.m.</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>2:00 - 2:50 p.m.</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>2:50 - 3:10 p.m.</td>
<td>Session Break / Vendor Showcase</td>
</tr>
<tr>
<td>3:10 - 4:40 p.m.</td>
<td>Roundtable Discussions</td>
</tr>
<tr>
<td>4:50 - 5:40 p.m.</td>
<td>Keynote Speaker</td>
</tr>
<tr>
<td>6:00 p.m.</td>
<td>XCM Evening Event</td>
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</tbody>
</table>

### Tuesday, May 21, 2019

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>7:00 - 8:00 a.m.</td>
<td>Continental Breakfast / Registration</td>
</tr>
<tr>
<td>8:00 – 8:50 a.m.</td>
<td>Keynote Speaker</td>
</tr>
<tr>
<td>9:50 – 10:10 a.m.</td>
<td>Session Break / Vendor Showcase</td>
</tr>
<tr>
<td>10:00 – 12:30 p.m.</td>
<td>Partners' Roundtable (Invite Only)</td>
</tr>
<tr>
<td>10:10 – 11:00 a.m.</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>11:10 – 12:30 p.m.</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>12:30 – 1:30 p.m.</td>
<td>Lunch Break</td>
</tr>
<tr>
<td>1:30 – 2:20 p.m.</td>
<td>Roundtable Discussions</td>
</tr>
<tr>
<td>2:30 – 3:00 p.m.</td>
<td>Closing Remarks</td>
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### Breakout Sessions

#### Innovation Beyond Technology

This session is dedicated to the idea that innovation goes beyond just digital transformation. Technology is important, but it’s only a small part of what drives innovation. For innovation to be more fully complete, we must look at other influences – such as the internal processes of an organization and more importantly, the very language we use. Innovating is hard work and not for everyone because it requires deeper thinking than most might expect. Attend this session, facilitated by Ed Kless, Sage Senior Director of Partner Development and Strategy, to learn how you can attain this level of thinking and drive further innovation for your company.

**Field of Study:** Business Mgmt. & Org  
**Prerequisites:** None  
**Target Audience:** All Levels  
**Advanced Prep:** None

#### Optimizing XCMworkflow® in Your A&A Engagements

Audit professionals today are faced with stricter regulations, tighter deadlines, and more staffing constraints than before. In this session, you'll learn how to expand your use of XCMworkflow & XCMscheduler to improve productivity and drive efficiency in your audit department. You will discover how to create additional capacity with your existing resources while creating 360° visibility across all your audit engagements.

**Field of Study:** Computer Software & Apps  
**Prerequisites:** None  
**Target Audience:** All Levels  
**Advanced Prep:** None

#### The Next Generation of the XCMscheduler®

Learn how new enhancements to the XCM Calendar-Based and Resource Allocation Scheduler will help drive increased productivity by proactively identifying bottlenecks, balancing resource capacity, and identifying who has capacity to take on more work. The enhanced XCMscheduler delivers a simplified user interface, quick action features, and added connectivity between RAS and Calendar.

**Field of Study:** Computer Software & Apps  
**Prerequisites:** None  
**Target Audience:** All Levels  
**Advanced Prep:** None

#### All this Talk about APIs and Why YOU Should be Listening

APIs enable different platforms to communicate with one another, allowing firms to connect their internal firm applications, and unlocking the power to extend the reach of data from one application to many. In this session, you will learn the basics of APIs and how they create efficiencies across your firm.

**Field of Study:** Computer Software & Apps  
**Prerequisites:** None  
**Target Audience:** All Levels  
**Advanced Prep:** None

#### XCManalytics as a Service®: A Conversation about Data Insights

XCManalytics as a Service is designed to simplify data insights and help tax and accounting professionals benchmark business performance by comparing business process and key performance metrics to XCM’s best practices and other peer group data.

It offers a multi-dimensional view of metrics and provides business leaders with both a historical and future-forward view of their business. Attend this session to learn how XCManalytics as a Service enables decision-makers to establish new data-driven KPIs and drive business growth.

**Field of Study:** Computer Software & Apps  
**Prerequisites:** None  
**Target Audience:** All Levels  
**Advanced Prep:** None
Breakout Sessions

A Deeper Dive into XCManalytics as a Service®

Learn more about the XCManalytics as a Service custom analytics package, including how it differs from the standard analytics package. XCManalytics as a Service is designed to simplify data insights that help tax and accounting professionals benchmark productivity compared to peers and gain even more in-depth reporting on business data. XCM’s highly experienced team can custom-create interactive reporting and dashboards that enable your business to determine best practices, prioritize opportunities for improvement, and more.

Field of Study: Computer Software & Apps  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

The People Side of Practice Management

No firm can succeed for long without addressing the issues surrounding staffing. Looking to find ways to make the relationship between a firm and its employees a win-win? This session will cover a wide range of best practices including: recruiting & retention strategies, building a strong culture developing staff, and creating succession plans.

Field of Study: Business Mgmt. & Org  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Workflow in a Day - CAS

Learn how to architect your business process around a workflow framework that allows your in house CAS experts and your current or future outsourcing strategy to coexist and scale up at a moment’s notice to meet the demands of your business. You will leave this hands on session with a complete roadmap for how to implement XCM in CAS. Take this session to the next level by bringing your PC and building your workflow in real time!

Field of Study: Computer Software & Apps  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Workflow in a Day – Audit

Audit professionals today are faced with stricter regulations, tighter deadlines, and more staffing constraints than before. In this hands on session, you can architect your business process around a workflow framework that creates additional capacity and better visibility across all your audit engagements. You will leave this hands on session with a complete roadmap for how to implement XCM in your A&A practice. Take this session to the next level by bringing your PC and building your workflow in real time!

Field of Study: Computer Software & Apps  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Workflow in a Day – Firm Operations

With less time and more demands, streamlining your operation is no longer a nice to have. In this session, you’ll learn how to expand your use of XCMworkflow to improve productivity and drive efficiency in every area of your firm. You will leave this hands on session with a complete roadmap for how to implement any firm operation you choose. Take this session to the next level by bringing your PC and building your workflow in real time!

Field of Study: Computer Software & Apps  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None
Breakout Sessions

What the 40 Under 40 are Saying about the future of the Accounting Profession

Join Gail Perry of CPA Practice Advisor for a facilitated panel discussion with XCM User and a recipient of the 40 Under 40 Award to hear what they have to say about the Future of the Accounting Profession.

Field of Study: Business Mgmt. & Org  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Automating Tax Return Assembly, Delivery & eSign With SafeSend Returns. Now Integrated With XCM!

Perfect session for tax partners, firm admins and IT to learn how SafeSend Returns can automate tax return assembly, delivery & eSign. XCM and SafeSend Returns integration highlights.

Field of Study: Computer Software & Apps  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Introduction to Emotional Intelligence

Research suggests that Emotional Intelligence (EQ), the ability to recognize and manage emotions in ourselves and others, is a better predictor of career success than the traditional measures of intelligence (IQ). This session will introduce the personal and social competencies that make up EQ and how this valuable skill can lead to better business decisions and overall workplace success.

Field of Study: Business Mgmt. & Org  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Power BI – From Zero to Sixty in Fifty Minutes

Despite the widespread deployment of spreadsheets, for many professionals these tools simply do not do an adequate job of facilitating financial and operational reporting. This is where Power BI comes into play. Created specifically to deliver real-time business intelligence, Power BI Desktop and Power BI Pro allow you to connect quickly to and summarize your financial and operational data. Moreover, these tools allow you to create stunning, dashboard-based visualizations of that data that you can share easily with other users. Further, if you need to access your Power BI reports and dashboards from your mobile device, well, there’s a free app that lets you do that too! Join us in this session to see how the Power BI tools can truly revolutionize your reporting practices.

Field of Study: Computer Software & Apps  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Recurring Tasks – Conquering the Set Up, Follow Up and Troubleshooting

Bring your computer or tablet and join us for an interactive session on conquering all things “Recurring”. We will begin with a step by step walkthrough of setting up recurring tasks, followed by a question and answer session on specific issue you bring and share. Even if you have never used this feature before; you will be a pro at the end of this interactive session.

Field of Study: Computer Software & Apps  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None
Breakout Sessions


This session is dedicated to the possibility that a firm can increase financial performance by moving from inward facing measurements to those that look outside the firm. Changing these metrics is not easy, as it requires firms to think differently than they have in the past. If you believe you can think a bit differently about your firm’s measurement systems, you are invited to attend this conversational session facilitated by Ed Kless, Sage Senior Director of Partner Development and Strategy.

Field of Study: Business Mgmt. & Org  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Coaching Teams and Individuals to Maximize Performance

Many business development professionals have dual roles: working externally to generate and pursue opportunities; and working internally to help others with their personal business development efforts. The latter requires skill and an effective approach. This session will provide an overview of best practices for coaching professionals that have been honed over more than two decades.

Field of Study: Business Mgmt. & Org  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

The Transformation of the Profession

In the accounting profession today, change simply isn't enough. Technology is disrupting and commoditizing many traditional services, but it also provides excellent opportunities for firms willing to transform their mindsets, skillsets and toolsets. The key is transformation. In this session, we’ll discuss how transformation is effecting the five areas critical to your firm's success: Leadership, Talent, Growth, Technology and Process and what your firm can do about it.

Field of Study: Business Mgmt. & Org  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

CPA Firm Technologies: Helping Your Practice Grow

Public accounting firms are currently faced with a technological tsunami. Besides traditional operational systems like Practice Management, Tax, Audit, Document Management and Workflow, there are new opportunities with tools based on artificial intelligence, machine learning and robotic process automation.

Join us in this session – designed specifically for public practice professionals – to gain some real-world, practical perspective on the opportunities we have today and specific actions you can take to take advantage of new tools and better techniques. Practical tools in all areas of practice from tax to audit to Client Accounting Services (CAS) will be included!

Field of Study: Business Mgmt. & Org  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Time Management for Accounting Professionals

The number one complaint I hear from members of our profession is that there isn’t enough available time to accomplish all that we want to do. In this session, you’ll learn easy-to-implement time management hacks that will change the way you approach your work and your life.

Field of Study: Business Mgmt. & Org  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None
Breakout Sessions

Nick Tasler


Nick’s original insights and dynamic style have benefited the world’s most respected organizations ranging from General Electric, Microsoft, and ExxonMobil to the Royal Bank of Canada, Wells Fargo, the Wharton School and Yale University.

Nomadic by nature, Nick and his wife and their four kids live...lots of places. Sometimes Minnesota. Sometimes Florida. Currently Puerto Rico where they’re working alongside many talented business and community leaders navigating a storm of massively disruptive changes. To learn more about Nick and his work, visit www.NickTasler.com

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Adding Value through Outsourcing

In this session you will learn how outsourcing your tax return preparation and/or bookkeeping work can add value to your firm, your clients, and to your staff. Outsourcing has become a viable business strategy for accounting firms. Utilizing outsourced services from XCM/Xpitax firms are able to transfer low-impact, repeatable processes from existing staff to our outsourced team. Leveraging the skills and expertise from Xpitax can dramatically increase your firm's ability to add value by freeing up staff time to focus more on client-facing activities.

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Developing & Growing a Successful CAS Niche in your Firm – Part I – The Firm

Client Accounting Services (CAS) has become the largest growth segment in accounting firms. Once considered a commodity that most firms only provided by necessity, CAS has now evolved into a promising service line with solid value for clients and strong upside potential for accounting firms. CAS, driven by cloud technology, has opened the door to profitable revenue, broken down geographic boundaries, and allowed accounting professionals to become strategic advisors to their clients. The opportunity to capitalize on these services requires firms to change. They will need a change in their mindset, a change in skillset, and change in how they interact with clients. This session takes you through the opportunities and challenges in building and growing a Client Accounting Services niche in your firm. This two part series was designed as two unique sessions; attendees will benefit from participating in one or both.

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Developing & Growing a Successful CAS Niche in your Firm – Part II – The Client

Client Accounting Services (CAS) CAS adoption should be mutually beneficial to the accounting firm and the businesses they serve. The ability to provide CAS services that give business owners greater financial insight and advice will drive higher profitability and revenue. It all starts with selecting the right clients, providing the right menu of services for each client’s needs, onboarding those clients effectively and having the ability to step into the advisory role. This session will explore the opportunities each firm has to elevate their role with their clients and how they interact with clients. We’ll explore what businesses think about Client Accounting Services and why it has become an important link between the CPA firm and its clients. This two part series was designed as two unique sessions; attendees will benefit from participating in one or both.
Breakout Sessions

XCM Quick Tips

In this session, we will introduce or refresh users on the features available in XCM, helping you get what you need with fewer clicks and shorter response times. We will highlight newly released features and how our standard features provide you access to the information you need, faster!

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**Virtual Controller: New Services for Expanding Your Accounting Firm**

There's a huge opportunity for accounting firms to add virtual controller services (VCS) to their firm's service offering. This session defines the key deliverables of a VCS engagement, the key technology pieces to efficiently deliver the services, plus pricing strategies to maximize profitability.

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**Digital Transformation: Method to the Madness!**

The impact of technology on accounting professionals has radically changed in the last decade. The digital transformation of cloud technology has signaled a new era of industry-specific applications (some designed for small business verticals and others specific to modern accounting practices) and their unique workflows. This session will help you navigate options available and identify the technology components to support the firm of the future.

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**The Wayfair Decision and Its Impact on Businesses**

This session will be led by GagnonTax, with an overview of what things looked like before and after Wayfair, the ramifications to even small businesses, the choices ahead, the consequences of non-compliance and the non-sales tax ramifications.

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**Roundtable Discussions**

We will dedicate two 1.5 hour segments for Roundtable Discussions. These discussions are designed for attendees to engage in an open dialogue with other users to discuss XCHANGE ideas, best practices, and strategies. Moderated discussions will be focused on relevant topics in the areas of people, processes, and technology. Attendees will have the option to pick from a variety of moderated topics and can select one topic or rotate to each roundtable discussion.
Special Events

Partners’ Luncheon (Invite Only)

As we meet and survey our partners, they are telling us a number of ways they are driving productivity in their firms.  Partners are leading the way by driving process excellence and leveraging XCM as the platform.  In this 3-hour session, partners will tap into the knowledge and experience of your peers during what is continually one of the highest-rated sessions of the conference.  In this session, facilitated by Jim Boomer, Boomer Consulting, you’ll have the opportunity to openly discuss the topics that have the most impact on the success of your firm.  We will collect topics from attendees prior to the conference and prioritize our discussion through real-time voting.  Contact your Account Owner or Client Service Representative for more information.  An RSVP is required.

Field of Study: Business Mgmt. & Organization  Prerequisites: None  Target Audience: All Levels  Advanced Prep: None

Onsite Complimentary Performance Reviews

Firms will obtain significant benefit through the proper utilization of core and value-added features found within the XCM application.  Complimentary Performance Reviews are designed to maximize your firm’s usage of these features.  Your XCM Client Service Representative will complete a comprehensive review of your firm’s XCM site, identify areas within the application that may be underutilized, and show you how to maximize your ROI of XCM.

Complimentary Performance Reviews are a service available annually to every firm.  Contact your Client Service Representative to schedule in advance of attending the conference.  Complimentary Performance Reviews are not eligible for CPE credit.
Networking Events

Meet a Product Owner
Want a chance to speak one-on-one with an XCM Product Owner? Attendees will have the ability through the event app to schedule time to XCHANGE your ideas with one of our product owners.

Client Support
Have a problem you need help tackling? Attendees will have the ability through the event app to schedule time with a member of XCM's client support team. They'll talk through your challenge and help you map out a solution.

Welcome Reception
Join us for a welcome reception to enjoy cocktails and appetizers while connecting with fellow users and reconnecting with familiar faces.

Nashville at Night
Join us for an evening of great conversations, libations and local grub! Experience Music City while networking with peers, speaking with thought leaders, and sharing your learnings from the day's sessions!