

LEA Global

IT Collaboration Group Call

Wednesday, February 28, 2024



Rising Star Association



INTERNATIONAL ACCOUNTING BULLETIN

Agenda

- Welcome and Introductions
 - Courtney Edwards, Bennett Thrasher
 - Please display your name and firm name on Zoom
- Facilitated Discussion on IT Roadmaps/Strategic Initiatives for 2024
 - Facilitators:
 - SC Member: Courtney Edwards, Bennett Thrasher
 - Other SC Members: Duane Squier, Keiter; Tyler Abel, Delap; Shawn Drourr, Kerkering Barberio
- LEA Updates

IT Roadmaps/Strategic Initiatives for 2024

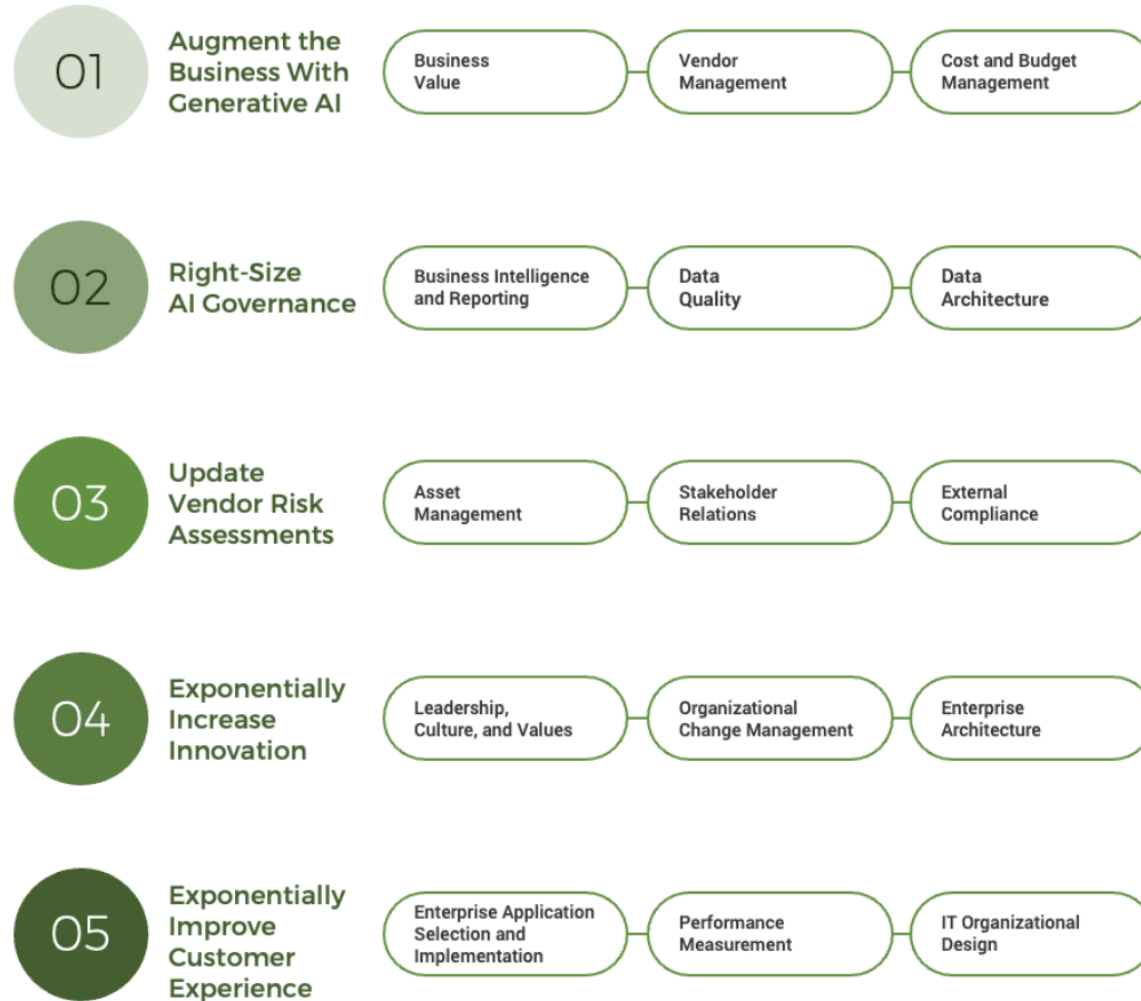
FIRM	TOP 3 IT ROADMAP/STRATEGIC INITIATIVES FOR 2024		
Keiter CPA	Process Management / Data Management	India Outsource Partner 2024	AI Pilots/Automation
Rich, Wightman & Company	Document manager change/upgrade	Upgrading to E3 for Office 365	Year end software/hardware upgrades
Miller Kaplan	Migrate "on prem" servers to Cloud	Security - Replace physical firewalls with SASE/SD-WAN	Security - Rollout Microsoft Intune onto laptops
KLR	RPA	Scheduling system replacement	BI Dashboards
KLR	Full Intune deployment	RPA	CRM
Kerkering, Barberio & Co.	Migrate to CCH Axcess	Deploy Intune/Entra-joined devices	Migrate TPA Firm to their own tech stack
Anders	Implementation of automated EL's and payments and collections	Generative AI efforts	New metrics\reporting capabilities
Marcum LLP	Generative AI	Digital Transformation	Offshoring
Bennett Thrasher LLP	Replace CCH Engagement	Improve Client Experience	AI vs Automation

THE FIVE CIO PRIORITIES FOR 2024

Engage cross-functional leadership to
seize opportunity while protecting the
organization from volatility.



CAPABILITIES



2024 Future of IT Survey; N=894 (partial), n=496 (completed)

Info-Tech conducted its online survey between May 23 and August 22, 2023. We received 894 total responses with 496 completed surveys. All respondents work in IT departments. More than 36% of respondents are the most senior IT leader in their organization, and 61% are at director-level seniority or above.

2024 Future of IT CIO interviews; N=23

Between July and September 2023, Info-Tech conducted in-depth interviews with 23 CIOs who took the online survey to receive more in-depth answers and explanations.

LEA Firms CIO Priorities

- AI
 - RPA & Automation
 - Reporting & Dashboards
 - Intune
 - DMS Replacement
-
- Do you feel you have the resources or talent necessary to complete these tasks?
 - Where do you feel your opportunities or risks are?

IT Maturity at Your Firm

- Survey – Where do you feel your IT team ranks in maturity?
 - IT transforms the business
 - IT expands the business
 - IT optimizes the business
 - IT supports the business
 - IT struggles to support the business
- What are you doing to reach the next level?

Collaboration with CxOs in Our Firms

- What projects are you collaborating on with your CxOs?
- Overcome budget and talent constraints
- Shared accountability



Hot Topics

How to keep employees traveling outside the country secure?

Innovation - How is it structured? Who leads and drives Innovation at your firm? How is it managed?

How are you leveraging AVD?

How are you meeting industry standards (Meeting standards ie GLBA, WISP, PCI)?

SOC2

Articles

- [CIO.com - 10 top priorities for CIOs in 2024](#)
- [PWC - What's important to CIOs in 2024](#)
- [BPM - Five priorities for CIOs in 2024](#)
- [Gartner Top 10 Strategic Technology Trends for 2024](#)
- [McKinsey Digital - False friends or good ends? The CIO's four-point guide to navigating technology trends](#)
- [EY - How can you cut costs and still accelerate growth?](#)

LEA Update

- 2024 Technology Survey
- Annual LEA North American Conference
 - June 9-12, 2024 (Dallas, TX)
- Emerging Leaders Program
 - Cohort 2 Graduation – June 18-19, 2024
 - Host Firm: Richey May & Co., Denver, CO
 - Start of Cohort 3 – June 20-21, 2024
 - Host Firm: Richey May & Co., Denver, CO
 - Registration Launch: Targeting March 15th

Next Calls

- March 27th – 2:00 to 3:00 pm central time
 - Topic: Technical Topics TBD
 - Facilitators:
SC Member: Shawn Drourr
Member Firms: Tyler Kaberline, Anders; and John Hayward, Miller Kaplan
- **April 2nd**
 - Steering Committee Call – Planning for June Conference

