



# K2 Tech Conference

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## Technology Conference with K2 Enterprises (2 days) November 3-4, 2022

This conference will be presented in a virtual format.

### 2022 Technology Conference for Accountants Sessions at a Glance

#### Thursday, November 3

9:30 - 10 am - Log-in

10 - 11:40 am - General Session | **Tech Update 2022**

11:50 am - 1:30 pm - Morning Breakout Sessions (Choose 1)

**Eight Awesome PivotTable Features**

**Emerging Topics in Blockchain and Cryptocurrency**

1:30 - 2:30 pm - Lunch

2:30 pm - 4:10 - Afternoon Breakout Sessions (Choose 1)

**The How's and Why's of Data Analytics**

**Tales of True Tech Crimes Ripped from the Headlines**

4:20 - 6 pm - General Session | **Windows 11 - What End Users Need to Know**

#### Friday, November 4

10 - 11:40 am - General Session | **Security Risks and Solutions Roundtable**

11:50 am - 1:30 pm - Morning Breakout Sessions (Choose 1)

**Safeguarding Taxpayer Data - A Guide for Your Required Security Plan**

**The Best Small Business Accounting Tools**

1:30 - 2:20 pm - Lunch

Afternoon Breakout Sessions

2:20 - 3:10 pm (Choose 1)

**How to Run Microsoft Office from the Cloud**

**Implementing Data Loss Prevention for Better Security and Privacy**

3:20 - 4:10 pm (Choose 1)

**Choosing Your Mid-Marketing Accounting Solution**

**Supercharging Your Spreadsheet Collaboration**

4:20 - 6 pm - General Session | **The K2 Team's Top Tech Productivity Tips and Tricks**

### 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-live demo and discussion

**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 2022

### Major Topics

- Hardware trends
- Software innovations
- Communication and collaboration tools
- Key products to consider for implementation

Breakout 1st day morning

## Eight Awesome PivotTable Features

### Major Topics

- Adding user-defined calculations to PivotTables
- Enhancing PivotTables with Key Performance Indicators
- Using PivotTables to consolidate “standard” Excel reports
- Creative ways to filter PivotTables
- Linking accounting software data into PivotTables

## Emerging Topics In Blockchain And Cryptocurrency

### Major Topics

- Blockchain basics and regulations
- Cryptocurrencies, stablecoins, and blockchain-enabled central bank digital currencies
- Smart contracts, sovereign identity management, cross-border funds transfer
- Emerging uses for blockchain-based ledgers

Breakout 1st day afternoon

## The How's And Why's Of Data Analytics

### Major Topics

- Understanding the four types of data analytics
- Differentiating between correlation and causation
- How to generate data analytics in Excel and other applications already in use
- The role of Artificial Intelligence in data analytics

## Tales Of True Tech Crimes Ripped From The Headlines

### 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 resulting in the theft of assets, or unauthorized data manipulation

General closing 1st day

## Windows 11 – What End Users Need To Know

### Major Topics

- Productivity improvements in Windows 11
- How to work with virtual desktops
- Customizing the user environment
- Improved security tools available in Windows 11

# DAY 2

General opening 2nd day

## Security Risks And Solutions Roundtable

### Major Topics

- Today's major cybersecurity threats
- Examples of data breach issues that should be concerning
- Practical solutions that you should consider implementing to reduce risk

Breakout 2nd day morning

## Safeguarding Taxpayer Data – A Guide For Your Required Security Plan

### Major Topics

- Understand the need for protecting client data
- Learn about the required security and privacy standards
- Leave with a sample plan to consider your tax practice

## The Best Small Business Accounting Tools

### Major Topics

- Overview of small business accounting solutions
- Traditional desktop and SaaS small business products
- Shortfalls of specific accounting solutions
- Strengths and weaknesses of various solutions
- Setup and configuration tips

Breakout 2nd day afternoon 1

## How To Run Microsoft Office From The Cloud

### Major Topics

- How to acquire and access Cloud-based Microsoft Office tools
  - The relative strengths and limitations of Cloud-based services compared to their desktop counterparts
  - Data storage requirements and options
  - Cloud-based options available from Zoho and Google
- ## Implementing Data Loss Prevention For Better Security And Privacy

### Major Topics

- Understanding the concept of Data Loss Prevention
- Examples of how DLP rules are beneficial
- Creating and enforcing DLP rules

Breakout 2nd day afternoon 2

## Choosing Your Mid-Market Accounting Solution

### Major Topics

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

## Supercharging Your Spreadsheet Collaboration

### Major Topics

- Collaboration methods using Microsoft Office and Microsoft 365
- Ways to track changes to sheets and compare different versions of a file
- Tools for sharing and responding to comments among a team from within a file

General closing 2nd day

## The K2 Team's Top Tech Productivity Tips And Tricks

### Major Topics

- Microsoft 365 tricks and tips
- Best practices for virtual meetings
- Productivity-enhancing apps and tools that you should consider using