

TUESDAY 13TH NOVEMBER | AGENDA AT A GLANCE

TIME	PINK ROOM	GREEN ROOM	YELLOW ROOM	BLUE ROOM	ORANGE ROOM	TECH TALKS
9:30 to 10:00	Extensible accounting systems – when add-ons don't add up		Big changes to how you process ATO correspondence – are you ready?		A crash course in innovation strategy from a Big Four bank	
10:05 to 10:35		The next killer feature in accounting? Holistic expense management		De-mystifying "Advisory Services"		
10:35 to 10:50						Taking Debtors days to 0 with Practice Ignition
10:40 to 11:10	It's not Alzheimers! Why we are struggling with passwords		How to monetise informal loans with a cloud-based register		How to turn ATO updates into consulting dollars, on autopilot	
11:05 to 11:20						Streamline compliance jobs to drive profitability
11:15 to 11:45		Why software design is connected to culture – and your ability to hire		Why I retrained my accountants as Google Data Engineers		
11:35 to 11:50						ATO SmartDocs a new way to process ATO Correspondence
11:50 to 12:20	Losing control of stock? Know when your client's inventory management needs an upgrade		Pain-free payments – the next wave in client services		Finding a better way – how to take your firm to the cloud	
12:05 to 12:20						Accelerate and simplify the way you do business with DocuSign
12:25 to 12:55		The top-tier law firm that disrupted the disrupters		What we can learn from the Poms – how accountants are winning with digital tax		
12:35 to 12:50						Deciphering clients pain points and implementing solutions around solving these
1:05 to 1:20						Streamline your client's R&D Tax Incentive claims with PwC's Nifty Grants
1:30 to 2:00	Measuring your ROI on people and culture is impossible, right? Not any more		Don't settle for second best when it comes to apps (especially expenses)		Is "the world's first law firm without lawyers" a model for accountants?	
1:35 to 1:50						Cross-platform reporting and forecasting for small and medium businesses
2:05 to 2:35		Why SMSF accountants can no longer rely on annual processing		Data scientist or data engineer? Understanding the best options for accountants		
2:05 to 2:20						The one place for everything: Unlock the QuickBooks Ecosystem
2:35 to 2:50						Partner with your clients and make money off STP
2:40 to 3:10	Testing the outer limits of accounting software – how big can you go?		Why you really need to start using a CRM		Utilising cloud technology to grow your business in 2019 and beyond	
3:15 to 3:45		Uber for accountants? It's already here real estate agents		The essential toolkit for delivering CFO services		
3:20 to 3:35						Microsoft Office 365 is more than Word, Excel and Outlook.
3:50 to 4:20	Adding an app to your practice or client's operations? Here's how NOT to do it.		How to build an advisory service model for a sustainable and scalable firm		Reclaim a quarter of your year – the automation opportunities right under your nose	
3:50 to 4:05						The productivity advantage of the Common Document
4:20 to 4:35						
4:25 to 4:55		How much of the marketing tech stack should accountants know? A primer		How a regional firm uses data engineering in advisory		

ROUND TABLES sponsored by

TIME	TABLE 1	TABLE 2	TABLE 3	TABLE 4	TABLE 5	TABLE 6
10:45 to 11:30	Facebook - merging the lines with business and friendships	Optimal daily schedule for bookkeeping firms	Product development for bookkeepers	Bookkeeping stack: Essential productivity apps	Business experiments for entrepreneurial firms	Beyond referrals: Ideas for online leads
12:00 to 12:45	Skills for successful cloud consultants	Communication tools for digital nomads	Effectively recommending apps to clients	Reactive to proactive: Taking control of your firm	Paperless office – quicker, cheaper and cleaner!	Improving your marketing tactics
2:15 to 3:00	Facebook - merging the lines with business and friendships	Optimal daily schedule for bookkeeping firms	Product development for bookkeepers	Bookkeeping stack: Essential productivity apps	Business experiments for entrepreneurial firms	Beyond referrals: Ideas for online leads
3:15 to 3:45	Skills for successful cloud consultants	Communication tools for digital nomads	Effectively recommending apps to clients	Reactive to proactive: Taking control of your firm	Paperless office – quicker, cheaper and cleaner!	Improving your marketing tactics

WEDNESDAY 14TH NOVEMBER | AGENDA AT A GLANCE

TIME	PINK ROOM	GREEN ROOM	YELLOW ROOM	BLUE ROOM	ORANGE ROOM	TECH TALKS
9:30 to 10:00	Benchmark advisory for tradies – fast ways to improve profit		The truth about automating bookkeeping – with no exceptions		Don't call me a Bookkeeper!	
10:05 to 10:35		Killer tips on how to kill email with chat		The future of BI reporting and democratising analytics		ATO SmartDocs a new way to process ATO Correspondence
10:35 to 10:50						
10:40 to 11:10	How proper inventory management can help your clients master multiple sales channels		The secret to scaling a subscription business		How to use AI to slash your SMSF service costs	
11:05 to 11:20						What's new in Xero
11:15 to 11:45		Busting the hype: What's really possible with Machine Learning in the next 5 years		Tools and techniques for your advisor journey		
11:35 to 11:50						Can you afford to lose a \$100K next week?
11:50 to 12:20	How to automate firms by using apps as full-time equivalents		From chaos to clockwork: Getting the most from payroll automation		How blockchain can turn company equity into a currency	
12:05 to 12:20						3 Ways You Can Use Credi Partner To Reduce Risk In Your Practice
12:25 to 12:55		How to use BI to replace printed reports in mid and large firms		How to build a model for data-driven advice in your firm		
12:35 to 12:50						How to adopt periodic processing in your practice
1:05 to 1:20						Partner with your clients and make money off STP
1:30 to 2:00	Tips for managing your work time with an Apple Watch		Facing technical overload with SMSFs? Automate, accelerate and profit		Social media for Principals: Best social media apps for speed, efficiency and delegation	
1:35 to 1:50						Managing uncertainty through talent on demand
2:05 to 2:35		Smithink tech survey 2018 – how does your firm compare?		Tech expert for clients – when do you bring it in-house?		
2:05 to 2:20						Accelerate and simplify the way you do business with DocuSign
2:35 to 2:50						The productivity advantage of the Common Document
2:40 to 3:10	How to keep your best SME clients by avoiding ERPs		Big clients slowing down their software? Workarounds for QBO and Xero		Reimagining the compliance workflow through automation	
3:15 to 3:45		Perfect match: Is new advice software doing enough to get a rose?		How to make the jump from Excel to databases in advisory		
3:20 to 3:35						
3:50 to 4:20	How to evaluate tech effectively for your firm (and clients)				How will the ATO operate in 2020? A new world for tax professionals	
3:50 to 4:05						Manage your clients' depreciation schedules with ease using MyBMT
4:20 to 4:35						
4:25 to 4:55		How to use Microsoft Power BI with Xero to run your practice KPIs		The right medicine: How Surface tablets changed a firm's operations and culture		

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Tuesday Seminars

9:30 - 10:00

PINK THEATRE

EXTENSIBLE ACCOUNTING SYSTEMS – WHEN ADD-ONS DON'T ADD UP

Grant Cowie, CEO, Cognito Software

Add-on apps for your accounting software work great – until you have too many of them. Then you start running into problems from syncing data across multiple systems; infrequent syncing, rising costs and compatibility. Learn how you can extend your current system and reduce your reliance on Excel sheets to run your clients' businesses.

- Find out when it's better to build a function rather than find an app for it
- Know when your clients have outgrown Xero, QuickBooks or MYOB
- Discover how scripts can cut operating costs and streamline the processes

9:30 - 10:00

YELLOW THEATRE

BIG CHANGES TO HOW YOU PROCESS ATO CORRESPONDENCE – ARE YOU READY?

Ron Drost, General Manager, Digital Disruption Solutions

The ATO is getting rid of their paper forms – and replacing them with email. Multiply the number of clients at your firm by an average five ATO communications a year and you're looking at thousands of emails. Emails that you can't forward to clients because of privacy laws. Here's how you can survive the coming tsunami.

- Learn how to update your systems and processes to deal with a digital ATO
- Find out why client portals work – and why they don't
- Discover how to identify and save ATO documents to document management

9:30 - 10:00

ORANGE THEATRE

A CRASH COURSE IN INNOVATION STRATEGY FROM A BIG FOUR BANK

Jeremy Wolfe, Agile Product Owner and Strategic Partnerships Manager, ANZ; Rebecca Stebbing, Agile Tribe Coach, ANZ

Innovation is pushing banks to solve problems in new ways, such as Human Centred Design and the Agile delivery methodology. These approaches drove the closely guarded secret project to connect to Apple Pay, and ANZ's reinvention of bank feeds (just released). Learn the principles of Agile and Human-Centred Design and how to apply them in your firm.

- Discover the agile methodology that works for a 10-staff accounting firm as well as a 50,000-staff bank
- Find out how to use research to add features to your services that customers desperately want
- Learn how to add bank accounts directly to accounting software from your banking portal (with two years' history)

10:05 - 10:35

GREEN THEATRE

THE NEXT KILLER FEATURE IN ACCOUNTING? HOLISTIC EXPENSE MANAGEMENT

Simon Dennis, Head of Partnerships, MYOB

Bank feeds were the killer feature that launched cloud accounting software and set the stage for automating bank rec. But it's not automated yet. The next major step is smart bills, smart receipts and direct feeds from major suppliers. Find out how invoice data sent directly from Reece, OfficeWorks and TradeLink to your accounting software takes that automation to the next level.

- Discover why line-item integration into accounting software transforms bank rec
- Find out how deeper integrations with suppliers delivers invoice data accurately and efficiently
- Learn why the payments workflow and receipt processing is critical to a connected practice

10:05 - 10:35

BLUE THEATRE

DE-MYSTIFYING "ADVISORY SERVICES"

Stuart Hunter, Senior Strategic Adviser, Futrli

Every accounting firm offers "advisory services" on their website, but what does this really mean for your firm and your clients? In this session we expose some of the most engaging and profitable best practices and some definite no-no's when embracing advisory change.

- Discover what your clients really think about "advisory services"
- Find out what your clients really need, but don't know how to ask
- Hear ways to get your team on board and really become a profitable advisory firm

10:40 - 11:10

PINK THEATRE

IT'S NOT ALZHEIMERS! WHY WE ARE STRUGGLING WITH PASSWORDS

Jamie Beresford, CEO, Practice Protect

Firms are still getting hacked despite privacy legislation and public information campaigns. The most common point of failure is passwords – we need to know far too many, and our memories are getting worse due to an intriguing side effect of technology. Learn easy and low cost ways to protect your firm, and avoid becoming a statistic.

- Discover the training, policies and password consolidation apps that can protect your firm
- Learn why our memory is changing and how to save it from slipping further
- Hear how a firm in Townsville got breached and the impact it had on the business

10:40 - 11:10

YELLOW THEATRE

HOW TO MONETISE INFORMAL LOANS WITH A CLOUD-BASED REGISTER

Tim Dean, CEO, Credi

The informal lending economy is huge. Sometimes referred to as "the bank of mum and dad", Australians lend sizeable amounts to children, parents and businesses so they can buy homes, retire or launch startups. Most of it goes unrecorded, but accountants can play a role in the informal lending market by registering loans cheaply, reducing risk for clients and generating a useful revenue stream.

- Learn how to efficiently mitigate risk in an uncertain economic climate
- Find out why it's critical to register informal loans to businesses and be listed as a creditor
- Hear case studies of who is doing the borrowing and lending and how much they lend

10:40 - 11:10

ORANGE THEATRE

HOW TO TURN ATO UPDATES INTO CONSULTING DOLLARS, ON AUTOPILOT

Ben Miller, Senior Writer, CCH IQ, Wolters Kluwer; Barry Males, Regional Product Manager, Wolters Kluwer

The ATO is the accounting profession's unceasing marketing machine. Did you know it could do sales, too? Find out how you can turn new legislation into a steady stream of consulting revenue across your client base. (It will also make you look like the most on-the-ball accountant ever.)

- Understand the concept of actionable content and a system that turns it into revenue
- Test your legislation knowledge against one of CCH's tax authors
- Learn how to identify legislative risks for your clients at scale – and notify them

11:15 - 11:45

GREEN THEATRE

WHY SOFTWARE DESIGN IS CONNECTED TO CULTURE – AND YOUR ABILITY TO HIRE

Tony Wall, Head of Design, Intuit

Wondering why the latest software uses cards to display jobs rather than a list? Toyota invented Kanban (“billboard” in Japanese) to run its production lines more efficiently. It is now used in business software and social sites like Instagram. Learn how this huge workflow improvement will also attract younger, smarter employees.

- Find out why the KanBan interface makes your staff more efficient
- Learn how software design influences a culture that appeals to Gen Y
- Understand why firms are shifting from task lists to project management

11:15 - 11:45

BLUE THEATRE

WHY I RETAINED MY ACCOUNTANTS AS GOOGLE DATA ENGINEERS

Gavin Whyte, Chief Data Scientist, Deloitte Australia

The Big Four are encouraging accountants to add more technical skills – but you won't find these courses listed under any accounting degree. Excel spreadsheets are not enough to cope with the amount of data that businesses generate. Hear an accountant turned data scientist explain why operating cloud databases are the new, must-have skill.

- Find out why data engineering is the next step for some Big Four accountants
- Learn what skills are required to use databases, and what they are used for
- Discover the services you can sell when you have data engineers on staff

11:50 - 12:20

PINK THEATRE

LOSING CONTROL OF STOCK? KNOW WHEN YOUR CLIENT'S INVENTORY MANAGEMENT NEEDS AN UPGRADE

Greg Murphy, Channel Manager and Founder, Unleashed Software

Basic inventory management might be enough for some businesses, but not all of them. For many, deficient inventory management means stock outages, lost sales and dissatisfied customers. Learn how to spot a business whose inventory management is holding them back – and how you can help them return to optimal growth.

- Discover improvements that cloud inventory management can bring to businesses
- Learn how to measure the impact of cloud inventory management on your clients
- Find out how to help clients avoid time-consuming setup in moving to the cloud

11:50 - 12:20

YELLOW THEATRE

PAIN-FREE PAYMENTS – THE NEXT WAVE IN CLIENT SERVICES

Robin Beauchamp, CEO, PayVu

Helping clients pay bills is thankless, frustrating work. Unless you use a dedicated payments engine that manages all the payments for you. Find out how to add an easy-to-use, highly secure service for every single client that will increase your revenue and dramatically improve client satisfaction.

- Learn why payments is the one service you don't deliver that every client needs
- Find out how to condense payment routines from hours to minutes
- Discover how to get near instant payment approvals from owners

11:50 - 12:20

ORANGE THEATRE

FINDING A BETTER WAY – HOW TO TAKE YOUR FIRM TO THE CLOUD

Amanda Newton, Head of Community, Australia, Xero; Jason Robinson, RBK Advisory, Xero Australian Accounting Partner of the Year 2018

Hear the story of a cloud accounting firm that launched just three years ago and now, thanks to an efficient app stack for advisory, has seven locations around Victoria. This nationally recognised accountant

will share his tech journey and give practical tips for how you can implement a best-practice tech stack in your business.

- Find out how to provide a holistic approach to accounting for your clients
- Learn about the marketing and social media strategies that drive growth
- Discover which apps the firm uses to boost productivity

12:25 - 12:55

GREEN THEATRE

THE TOP-TIER LAW FIRM THAT DISRUPTED THE DISRUPTERS

Berys Amor, Director of Technology, Corrs Chambers Westgarth

Technology is commoditising professional services in law as in accounting – yet one legal firm has found a revolutionary way to fight back. Hear how a top-tier firm turned legal services into valuable products by building a client technology solutions team and creating its own SaaS based solutions. Clients can manage their business processes, download pre-filled legal documents and access industry-specific services unavailable elsewhere.

- Learn how start-ups and corporates use dynamic, “smart” legal documents
- Find out how the firm targeted property development, lease management, trade promotions and start-ups
- Understand the process behind turning a commoditised service into a sticky product

12:25 - 12:55

BLUE THEATRE

WHAT WE CAN LEARN FROM THE POMS – HOW ACCOUNTANTS ARE WINNING WITH DIGITAL TAX

Mark Holton, Director, Smithink

The UK may be behind in usage of cloud accounting software but digitisation of the UK government is well ahead. It introduced Single Touch Payroll three years ago and is dictating enormous changes to compliance with its Making Tax Digital program. Find out how this is affecting firms in the UK and which elements of the program the ATO will likely bring to Australia.

- Discover how you can future proof your firm against regulatory disruption
- Understand the potential impact to the Australian accounting market
- Hear how UK firms are scaling up their advisory services in response

1:30 - 2:00

PINK THEATRE

MEASURING YOUR ROI ON PEOPLE AND CULTURE IS IMPOSSIBLE, RIGHT? NOT ANY MORE

Amanda Kenafake, CEO, Power Tynan

Accounting firms are notorious for underinvesting in staff and culture and there's a pretty good explanation for it. If you can't measure the return then you can't manage the investment. One firm has discovered a way to do just that with a new app from Melbourne. Find out how this experiment in culture has paid big dividends for a small firm.

- Discover how to map productivity against the emotional wellbeing of staff
- Find out how a firm proved the impact of culture on business performance
- Understand that each employee is different and how to get the most out of them

1:30 - 2:00

YELLOW THEATRE

DON'T SETTLE FOR SECOND BEST WHEN IT COMES TO APPS (ESPECIALLY EXPENSES)

Damien Greathead, ReceiptBank

While accounting software is expanding into basic expense management, firms will always achieve far greater efficiency in their compliance process with a dedicated app. Discover what is on the roadmap for managing teams that collect and process invoices and other data, and how they will drive the next level of efficiency and increased margin.

- Learn about the next generation of automation in compliance
- Hear about the latest discoveries in team productivity
- Find out how firms are using cutting-edge technology for bigger margins in compliance

1:30 - 2:00

ORANGE THEATRE

IS "THE WORLD'S FIRST LAW FIRM WITHOUT LAWYERS" A MODEL FOR ACCOUNTANTS?

Adrian Cartland, Principal, Cartland Law and CEO, Ailira

If accounting feels like it's racing towards AI, consider that law is already there. An Australian company already uses natural language processing to scan case law and reduce unbillable research time. Its consumer chatbot gives free legal information to clients. And it has identified areas of law that are "scalable" for commoditisation and automation. Find out what this means for accounting.

- Learn how bespoke advice can be standardised, systemised, packaged, commoditised and automated
- Find out the human qualities that AI can never replace
- Discover how automation principles can be applied to accounting

2:05 - 2:35

GREEN THEATRE

WHY SMSF ACCOUNTANTS CAN NO LONGER RELY ON ANNUAL PROCESSING

Sebastien Brennan, Implementation Consultant, Class Super

Sweeping super reform has transformed the SMSF industry. Annual processing can no longer be relied on to ensure your clients remain compliant. Discover the driving forces behind the move to periodic processing and learn how you can painlessly adopt this new workflow in your practice.

- Find out how to restructure your practice to process funds more often without blowing out costs
- Discover all the benefits that periodic processing will deliver to your clients and your practice
- Learn how technology can help your practice achieve periodic processing

2:05 - 2:35

BLUE THEATRE

DATA SCIENTIST OR DATA ENGINEER? UNDERSTANDING THE BEST OPTIONS FOR ACCOUNTANTS

Russell Nash, Customer Engineer for Data Analytics, Google

Accountants are already fluent in understanding financial data. Non-financial data, however, is a whole new world, one that holds the key to high-value advisory services. Discover the skills required to plumb together systems for collecting non-financial data, and how to write the formulas that turn it into meaningful insights.

- Find out the difference between data engineering and data science
- Understand which skills are more important to your firm
- Learn about the ways these two roles turn data into advice

2:40 - 3:10

PINK THEATRE

TESTING THE OUTER LIMITS OF ACCOUNTING SOFTWARE – HOW BIG CAN YOU GO?

Tim Richardson, CEO, Growthpath; Inbal Steinberg, consultant, Convertworx

How powerful is cloud accounting software? The software no longer runs on your desktop but in enormous computing warehouses with unlimited processing capacity on tap. But eventually you start to run into issues with running reports or uploading data. Find out where the limits are for invoices, transactions and bills – and reporting! – and how these systems cope with high-volume businesses.

- Hear the results of experiments designed to stress test SME accounting software
- Learn how you can shift processing to ecosystem apps
- Discover the breakpoints in small business accounting software

2:40 - 3:10

YELLOW THEATRE

WHY YOU REALLY NEED TO START USING A CRM

Elzerie Van Wyk, Product Evangelist, Sage; Gary Weisz, Sales Manager, Accountants, Sage

If strong relationships are the key to generating business, meeting client expectations, and growing your practice, why do so few firms spend so little effort tracking those relationships? Find out how a tool dedicated

to keeping your clients happy can transform the operation of your firm into a steady stream of advisory work.

- Learn how a CRM platform can help you perform targeted marketing
- Find out why it's critical to have a central client database
- Discover the benefits of an open CRM platform

2:40 - 3:10

ORANGE THEATRE

UTILISING CLOUD TECHNOLOGY TO GROW YOUR BUSINESS IN 2019 AND BEYOND

Ben Gill, Sales Director, NowInfinity

Learn how to utilise cloud technology to increase revenue and increase efficiencies across your firm's entity establishment, management and corporate compliance capabilities. You can centralise historical data stored on your desktop by using a cloud-based trust register. This gives you a base to automate your process, generate forms automatically and easily re-price your services.

- Discover the 5 documents that should generate the most revenue in your firm
- Learn how to increase the efficiency of your corporate compliance service
- Hear how to manage trusts at scale

3:15 - 3:45

GREEN THEATRE

UBER FOR ACCOUNTANTS? IT'S ALREADY HERE FOR REAL ESTATE AGENTS

Matthew Taylor, Business broker, Accounting Practice Sales

The taxi industry was a stable business with strong underlying resale values until Uber came along. Now Uber-type models are appearing in real estate and financial services and could disrupt the accounting partnership model. Find out how "start-up" firms can gain traction and manage cost structures in new models crossing over to the accounting industry.

- Learn how Uber-style models are already challenging real estate franchises
- Find out why ignoring change risks reducing your firm's valuation
- Understand why a partner model struggles to compete with tech-based models

3:15 - 3:45

BLUE THEATRE

THE ESSENTIAL TOOLKIT FOR DELIVERING CFO SERVICES

Lance Rubin, CEO, Model Citzn

What tools do you need to be a (virtual) CFO for your clients? The short, easy answer is Excel. But if you want to streamline the way you process, model and report on your clients' data then you will need a more sophisticated toolkit. Find out which tools an experienced CFO and financial modeller uses to inform and impress SMEs.

- Discover the apps automating CFO services at a start-up financial services lender
- Learn how to assess CFO tools to see whether they are fit for purpose
- Hear about the direction of CFO services and how to stay ahead of the market

3:50 - 4:20

YELLOW THEATRE

HOW TO BUILD AN ADVISORY SERVICE MODEL FOR A SUSTAINABLE AND SCALABLE FIRM

John Peterson, Managing Director, Best Practice Group

Firms struggle to deliver advisory services because too often they roll it out ad hoc, with no thought to the system behind it. An advisory framework can give you a service model that all your staff understand, technology that sets you apart from the compliance crowd and delivers a sustainable income stream to your firm.

- Learn which business advisory services are scalable and which are not
- Find out what accountants will deliver as core services by 2028
- Get a three-stage blueprint to rolling out business advisory services

3:50 - 4:20

PINK THEATRE

ADDING AN APP TO YOUR PRACTICE OR CLIENT'S OPERATIONS? HERE'S HOW NOT TO DO IT.

Rhys Bennett, Account Manager, We Are Waypoint

Technology is often magical and shiny on first sight. Getting the damn thing to work for your business is a whole 'nother matter. If you want to roll out an app in your firm spend a couple of minutes on how to make sure you get bang from your buck. Don't add to the pile of tech sitting unused on the shelf.

- Find out the critical steps to prepare your business for a change in process
- Learn about the communication secrets that eliminate resistance
- Discover the biggest mistake that kills most projects before they've even started

3:50 - 4:20

ORANGE THEATRE

RECLAIM A QUARTER OF YOUR YEAR – THE AUTOMATION OPPORTUNITIES RIGHT UNDER YOUR NOSE

Trudi Saul, Marketing & Communications Manager, Smarter Business Processes

Wondering where all your capacity is going? Know you want to focus on business growth but just can't find the time? Automating repetitive processes is one of the easiest ways to improve productivity and free your team up to focus on activities that are more engaging, and that clients actually value.

- Hear how to optimise your systems to turbocharge your practice's productivity
- Learn how to identify and prioritise opportunities for automation
- Find out how to automate low-value compliance activities and create 25% administrative capacity

4:25 - 4:55

GREEN THEATRE

HOW MUCH OF THE MARKETING TECH STACK SHOULD ACCOUNTANTS KNOW? A PRIMER

Lisa Andrews, COO, Ignite Alliance

Marketing and accounting – you couldn't get two more disparate activities that attract very different people. Yet if accountants are serious about advising their clients on growing their businesses they will inevitably need to know more about marketing. The question is – how much? Find out from an accounting firm that sells marketing services where you should draw the line.

- Learn about the categories of marketing technology and how they work together
- Find out which marketing apps are most critical to SMEs
- Discover how you can add services through partners that help clients grow

4:25 - 4:55

BLUE THEATRE

HOW A REGIONAL FIRM USES DATA ENGINEERING IN ADVISORY

Dan Beck, director, PT2

Imagine a company that grows seedlings for nurseries wants to know the profit on each type of seed. Where would you start? A regional Queensland firm walks you through the challenge that led it to install biometric scanners, integrate ERP and SaaS software and run big-data analytics to discover their client's most profitable product.

- Understand the methodology for turning a business question into an IT project
- Find out how a firm researches options for creating and collecting data
- Learn how to pull together different types of data from different systems

Wednesday Seminars

9:30 - 10:00

PINK THEATRE

BENCHMARK ADVISORY FOR TRADIES – FAST WAYS TO IMPROVE PROFIT

Glen Jones, Customer Success Lead, Tradify

Benchmarking can show your tradie clients which jobs are the most profitable and which staff are the most effective. You can compare the number of invoices they send a month to other electricians. You can even reveal where they were most likely find those profitable jobs by pulling apart industry trends. What would that be worth?

- Find out how to segment clients' files to know what is working – and what isn't
- Learn how to read benchmark data to unearth easy improvements for clients
- Discover how to become part of your client's team

9:30 - 10:00

YELLOW THEATRE

THE TRUTH ABOUT AUTOMATING BOOKKEEPING – WITH NO EXCEPTIONS

Tim Hoopmann, CEO, Spinn Solutions

How automated can bookkeeping really be? There's always an exception that forces you to pick up the phone or manually adjust the file. Bookkeeping breaks down to 18 processes. Hear a frank assessment of how many of these can be (and have been) automated – and how far we still have to go.

- Find out how to summarise everything a bookkeeper does into one set of rules
- Discover which processes leading bookkeepers have automated (or not)
- Learn about the best in breed technology with highest level of automation

9:30 - 10:00

ORANGE THEATRE

DON'T CALL ME A BOOKKEEPER! HOW TO DIGITISE A BOOKKEEPING PRACTICE

Amanda Newton, Head of Community, Australia, Xero; Don Grgic, Business Boost Centre, Xero Australian Bookkeeping Partner of the Year 2018

Hear a nationally recognised bookkeeper share firsthand the secret to a successful cloud journey. In this raw Q&A, you will hear about the people, process and business challenges a bookkeeper overcame as part of the digitisation of their growing cloud practice. A session packed with real recommendations for how to successfully use technology in your practice.

- Find out how to provide a holistic approach to bookkeeping for your clients
- Discover how innovation can improve business performance
- Learn how to use tech stacks to provide advisory to clients

10:05 - 10:35

GREEN THEATRE

KILLER TIPS ON HOW TO KILL EMAIL WITH CHAT

Tony Wall, Head of Design, Intuit

The internal CC email is the primary culprit for overflowing inboxes. Unfortunately, it's the most common communication method within most firms. The most progressive firms will tell you that chat is the antidote to the CC email. It's also the medium of choice for Gen Y and younger staff. But how do you run your firm on chat?

- Learn the principles of chat in business and how it differs from work email
- Find out how progressive firms use chat to reduce email anxiety
- Discover why your best future hires want to join a firm that uses chat

10:05 - 10:35

BLUE THEATRE

THE FUTURE OF BI REPORTING AND DEMOCRATISING ANALYTICS

Michael O'Keefe, Director Business Applications Group, Microsoft

Want to help your clients grow faster? Business intelligence (BI) tools reveal the pivot points within a business that will lift revenue to the next bracket. Learn why enterprise BI tools unearth more valuable insights than custom reports from accounting software, and how they turn tables of numbers into attractive visualisations that support a powerful story for growth.

- Understand the basics in setting up business intelligence dashboards
- Discover how to drill down on underlying data sets and drive greater insight
- Learn how to use natural language queries to visualise data

10:40 - 11:10

PINK THEATRE

HOW PROPER INVENTORY MANAGEMENT CAN HELP YOUR CLIENTS MASTER MULTIPLE SALES CHANNELS

Greg Murphy, Channel Manager and Founder, Unleashed Software

The proliferation of new sales channels in recent years presents a significant opportunity for your clients. But only if they can avoid the many potential pitfalls that arise when selling across different marketplaces. Learn why cloud inventory management is more pivotal than ever in the age of Amazon, Shopify, Vend and more. Plus the benefits it can bring you as an advisor to your clients.

- Find out the crucial role of inventory management in your clients' multichannel strategy
- Learn how clients can sell across multiple marketplaces without sacrificing accuracy
- Discover how to help your clients give every customer the best buying experience

10:40 - 11:10

YELLOW THEATRE

THE SECRET TO SCALING A SUBSCRIPTION BUSINESS

Joseph Robbins, Country Lead, Australia, GoCardless

Moving from hourly to value-based, subscription billing is hard – it requires a whole new pricing model for a start. But selling subscriptions only works at scale if it has the the right payments solution behind it. Find out how to grow recurring revenues, automate away your payments admin and fast-track client adoption for your value-pricing business.

- Discover why firms struggle with slow adoption of subscriptions and admin blowouts
- Stop arguing with clients over invoices and switch to recurring payments in the background
- Learn how to get your clients asking for subscriptions instead of invoices

10:40 - 11:10

ORANGE THEATRE

HOW TO USE AI TO SLASH YOUR SMSF SERVICE COSTS

Matt Crofts, Head of Product - Sf360, BGL

Software has been eating the Accounting world since the introduction of the spreadsheet. Learn how a few critically important maths algorithms are combining with software to deliver the future of SMSF processing. Find out how to set up zero-touch SMSF processing and improve your margins for every SMSF client, not just the simple clients.

- Discover how to scale your SMSF business with little effort
- Find out how to use machine learning with manual processes
- Learn how algorithmic "confidence levels" change the way you look at data

11:15 - 11:45

GREEN THEATRE

BUSTING THE HYPE: WHAT'S REALLY POSSIBLE WITH MACHINE LEARNING IN THE NEXT 5 YEARS

Gavin Whyte, Chief Data Scientist, Deloitte Australia

Machine learning has been so heavily promoted by accounting software companies that it's hard to know where the hype stops and reality starts. What everyone wants to know – how big an impact will

ML have, and when? One of Australia's top data scientists, who writes these algorithms, reveals the ML roadmap that software companies aren't prepared to share.

- Understand how ML works today and how it applies to business problems
- Discover the exact functions that ML will automate the compliance process
- Find out where the industry is over-promising and where it has underinformed

11:15 - 11:45

BLUE THEATRE

TOOLS AND TECHNIQUES FOR YOUR ADVISOR JOURNEY

Heather Smith, Director, Anise Consulting

Want to fast-track the launch of advisory services? If you're confidently completing accounts, join us to discover additional services you can offer existing clients. Learn techniques such as management reporting, spreadsheet manipulation and cash flow forecasting. Add analytical tools and you can offer advisory services to clients immediately.

- Learn about the essentials of the cash flow forecast
- Discover why tools that support communication with clients are critical to advisory
- Understand the range of advanced advisory tools

11:50 - 12:20

PINK THEATRE

HOW TO AUTOMATE FIRMS BY USING APPS AS FULL-TIME EQUIVALENTS

Guy Pearson, CEO, Practice Ignition

Admin hours eat your margins; improving efficiency is a constant goal in any business. Rather than saving a couple of hours here and there, you can automate whole chunks of your firm's processes by employing an app instead. Discover clever, new ways to connect apps so that one process rolls seamlessly into the next.

- Learn the latest tips for maximising Zapier to connect essential practice apps
- Find out how to automate adding new clients, from pre-qualification to notifying staff
- Discover how chat platforms can replace your admin

11:50 - 12:20

YELLOW THEATRE

FROM CHAOS TO CLOCKWORK: GETTING THE MOST FROM PAYROLL AUTOMATION

Michael Smith, Commercial Head of Payroll, ELMO Cloud HR & Payroll

Payroll is an organisation's biggest expense and carries inherent risk – risk of fraud, risk of under or overpaying employees, and risk of underpaying authorities. Indeed, Australia is one of the five most complex countries for payroll. Automating payroll and HR operations can help SMEs strike the balance between governance and compliance, and the cost of delivery.

- Learn about potential savings in cost, time and resource by automating payroll – for you and your clients
- Discover how integrating HR and payroll can streamline workflows and reduce admin
- Understand the risks of manual payroll processes

11:50 - 12:20

ORANGE ROOM

HOW BLOCKCHAIN CAN TURN COMPANY EQUITY INTO A CURRENCY

Jason Atkins, Co-founder, Enhanced Society

Despite the proliferation of blockchain ideas, few implementations are being used today. An entrepreneurial Gold Coast accountant and cryptocurrency investor is releasing one of the first in Australia as a smartphone app. Find out why adding blockchain tech to a cap table changes the nature of managing equity.

- Understand how a blockchain is used to create and transfer digital share certificates
- Learn how a company can have the benefits of being listed without listing
- Hear about the ASX's own blockchain project and how it compares

12:25 - 12:55

GREEN THEATRE

HOW TO USE BI TO REPLACE PRINTED REPORTS IN MID AND LARGE FIRMS

David Burke, Group Head of Sales, Reckon APS; Dan Beck, Director, Power Tynan

Firms print off pages and pages of reports to track what's happening in the business. Most of this is useless information that tells you nothing about where you're leaving money on the table. Hear how one firm used the power of BI to turn static reports into interactive visualisations – and the insights that made it more money.

- Find out how to identify useful data and cut back reports to a couple of pages
- Hear from an APS power user how they use Microsoft Power BI to run the firm
- Discover how to stay on top of reporting as your toolbox grows

12:25 - 12:55

BLUE THEATRE

HOW TO BUILD A MODEL FOR DATA-DRIVEN ADVICE IN YOUR FIRM

Leandro Dos Santos, National Sales Account Manager, Sage Digital Transformation | Page 1/7
Weisz, Sales Manager, Accountants, Sage

Everyone is talking about selling data-driven business advice – but how exactly do firms do it at scale? Only by analysing financial and non-financial data together can you find commercially valuable insights for your clients. Join this walkthrough of how to use a business intelligence tool to analyse mixed data and create a custom report for an example client.

- Find out how BI tools can help you access the data you need to provide business advice
- Discover how you can track the progress of lodgements with the help of a BI tool
- Learn how to automate data collection and scale it across clients

1:30 - 2:00

PINK THEATRE

TIPS FOR MANAGING YOUR WORK TIME WITH AN APPLE WATCH

Sholto Macpherson, Editor, DigitalFirst.com

Apple Watch, the king of wearables, is finding unusual roles in productivity and personal finance. You can program one Australian bank to move money between accounts each time you hit a fitness goal. Discover all the best tricks for self-motivation and monitoring your personal and business finances on a smartwatch.

- Learn how to link a financial incentive to a fitness goal
- Discover motivational apps to help you perform better at work
- Find out how to monitor business KPIs on the go

1:30 - 2:00

YELLOW THEATRE

FACING TECHNICAL OVERLOAD WITH SMSFS? AUTOMATE, ACCELERATE AND PROFIT

Maureen Mowat, Manager, Software Services, Super Concepts; Rhys Hopper, Customer Success Officer, Super Concepts

More legislation means slower processing of SMSFs – and lower profits. Automated end of year processing and an exception-based approach can reduce the time to complete even complex SMSFs to under 25 minutes. Discover the benefits of automated transactional and unit holding processing and reconciliation, integration of a smart document management program and foremost being able to do the whole job in the one system.

- Learn tips to increase efficiency and offset an increased workload
- Find out how to use automated transactional and unit holding reconciliation
- Discover how to process SMSFs by exception – and not by transaction

1:30 - 2:00

ORANGE THEATRE

SOCIAL MEDIA FOR PRINCIPALS: BEST SOCIAL MEDIA APPS FOR SPEED, EFFICIENCY AND DELEGATION

MC Carter, CEO, Practice Paradox

Social media is a pain in the proverbial. Yet it is expected that if you're in business you are on at least LinkedIn and Facebook. How does a busy accounting professional check channels and maintain a social heartbeat without wasting buckets of time? Are social media management apps worthwhile or is it easier to work within each network?

- Discover how to minimise your time on social for maximum benefit
- Learn about the pros and cons of management tools vs posting directly
- Find out how to engage on social without getting sucked into the vortex each time

2:05 - 2:35

GREEN THEATRE

SMITHINK TECH SURVEY 2018 – HOW DOES YOUR FIRM COMPARE?

David Smith, CEO, Smithink

How do you go about creating an IT strategy for your firm? It certainly helps to know what other firms are doing already. In Smithink's latest technology survey of over 300 firms you will discover the applications and operating systems that your peers are using to drive greater levels of efficiency.

- Learn the latest tech trends in the accounting profession
- Understand how your firm compares with its peers
- Discover new technologies that may benefit your firm

2:05 - 2:35

BLUE THEATRE

TECH EXPERT FOR CLIENTS – WHEN DO YOU BRING IT IN-HOUSE?

Beau Gaudron, Tech Ninja, Growthwise; Steph Hinds, CEO, Growthwise

Ecosystem apps are unavoidable if you're working with accounting software. How much responsibility should the accountant and bookkeeper take to set them up? What do your clients want you to do? Find out how one firm made the decision to bring tech support in house, how they decide when to bring in external partners, and how in-house IT has changed its compliance services.

- Do accountants need to care about implementing apps?
- Doing the maths – in house vs outsource
- Find out how to offer tech services to your existing clients

2:40 - 3:10

PINK THEATRE

HOW TO KEEP YOUR BEST SME CLIENTS BY AVOIDING ERPS

Matt Paff, CEO, Value Adders

Cloud accounting has completely reset the tipping point for an SME moving to an ERP. Cloud accounting software plus ecosystem apps can give your best clients 80+% of the functionality of an ERP at a fraction of the cost. Hear how one NGO moved from an ERP to a cloud accounting program and saved \$10,000 a year in licences.

- Discover why the competitive landscape has changed so dramatically
- Find out why SMEs think they need an ERP and how to convince them they don't
- Learn how firms can keep their best clients longer by selling back office services

2:40 - 3:10**YELLOW THEATRE****BIG CLIENTS SLOWING DOWN THEIR SOFTWARE? WORKAROUNDS FOR QBO AND XERO**

Inbal Steinberg, Consultant, Convertworx

When your biggest client starts clocking up transactions their accounting software can struggle. Reports take forever to process and the conversation turns to upgrading to ERP. But ERPs are expensive, nowhere near as user friendly – and you will probably lose that client. Discover a host of tricks to squeeze more out of your accounting platform.

- Learn the workarounds that keep your clients' software costs as low as possible
- Understand what you gain and what you lose with an ERP
- Know when it really is in the client's best interest to move to ERP

2:40 - 3:10**ORANGE THEATRE****REIMAGINING THE COMPLIANCE WORKFLOW THROUGH AUTOMATION**

Lisa Miks, Senior Product Manager, MYOB

Compliance has typically run like a relay race, with one task handing off to the next in a consecutive sequence. What if you deconstructed that relay and replaced it with a concurrent approach that removed bottlenecks? Find out what compliance looks like when knowledge about the client is present at every point in the compliance workflow.

- Find out why bolting together apps creates a sub-optimal compliance experience
- Understand the primary research behind the concurrent compliance model
- Discover why transaction automation drives efficiency in compliance outputs

3:15 - 3:45**GREEN THEATRE****PERFECT MATCH: IS NEW ADVICE SOFTWARE DOING ENOUGH TO GET A ROSE?**

Thomas Mackellar, Manager Advice & Accounting Technology, Count Financial

AdviceTech is all the buzz at the moment in financial planning. But will the promise of a revolution actually occur? We will explore the current state of this ecosystem and navigate through the all hype of integration with accounting software.

- Understand the current ecosystem in financial planning technologies
- Know what is available now rather than in five years' time
- Learn about the challenges in integrating financial planning technology with accounting

3:15 - 3:45**BLUE THEATRE****HOW TO HELP AMAZON RETAILERS ANALYSE THEIR SPENDING**

Ireene Siniakias, Director, Swis Agency

Amazon is a booming platform for retailers. When your retailer clients open up an Amazon store, how do you track sales, analyse trends and plot forecasts? Find out how to provide quality business advice in this fast-moving, growth market for SMEs.

- Learn how to extract the sales data from the Amazon platform
- Discover the idiosyncrasies of an e-commerce giant
- Understand what to do when you uncover hot products in a retailer's inventory

3:50-4:20**YELLOW THEATRE****SMALL IS BEAUTIFUL – WHY LEADING FIRMS ARE DOWNSIZING THE DESKTOP PC**

Craig Traub, Head of Customer Delivery Services, Fronde

Why buy a big desktop PC if you're mainly using cloud applications? Storing any documents on your local hard drive leaves you open to Cryptolocker ransoms and information theft. Find out how low-cost,

mini-PCs for your staff can dramatically reduce your risk profile and your IT budget.

- Understand the implications and efficiencies of a cloud strategy in accounting firms
- Discover how much an average firm can save on their annual hardware spend
- Learn why mini-PCs are so much safer than your desktop PC

3:50 - 4:20**PINK THEATRE****HOW TO EVALUATE TECH EFFECTIVELY FOR YOUR FIRM (AND CLIENTS)**

Katie Bryan, CEO, Propeller Advisory; Anita Da Encarnacao, Cloud Consultant, BookStar; Paul Meissner, Director, 5ways Group (MC)

The accounting profession is up to its nose in brilliant ideas, productivity breakthroughs and integrations, but how do you know which will work and which you should invest in? Come and learn a skill that today is indispensable – how to perform a quick, thorough evaluation of new technology for your firm and make a decision about whether to invest.

- Hear methodologies used by tech-savvy accounting professionals
- Learn how to avoid app bloat and run an efficient tech stack
- Find out how to make sure you're getting the most out of your current stack

3:50 - 4:20**ORANGE THEATRE****HOW WILL THE ATO OPERATE IN 2020? A NEW WORLD FOR TAX PROFESSIONALS**

John Dardo, Chief Digital Officer, ATO; Sholto Macpherson, Editor, Digital First

The ATO's CDO will provide an overview of digital services that are currently being rolled out and explain the opportunities that these services provide.

- Get an update on the range of services being made available by the ATO to agent and business software providers
- See the new services available to agents in the new ATO online environment
- See the new identity system being piloted by the ATO

4:25 - 4:55**GREEN THEATRE****HOW TO USE MICROSOFT POWER BI WITH XERO TO RUN YOUR PRACTICE KPIS**

Ryan Davey, Marketing Tech Guru, Unicorn Business Solutions

Running a cloud practice can be challenging if you don't know the key activities behind your firm's numbers. You can run around in circles with custom reports. High-powered business intelligence tools give you the report you want – and show you what's behind each stat with a single click. Find out how to add drill-down reporting to your firm.

- Measure client group profitability and reporting on time, productivity and efficiency
- Discover how to show quote versus actual job performance and where you lost margin
- Learn how to use BI reporting on ecosystem apps in project management and inventory

4:25 - 4:55**BLUE THEATRE****THE RIGHT MEDICINE: HOW SURFACE TABLETS CHANGED A FIRM'S OPERATIONS AND CULTURE**

Troy Townley, Director, HTA Advisory

Advisory is turning accountants from desk jockeys to road warriors, and moving meetings from boardrooms to cafes. The laptop works well enough but the latest business tablets use styluses and touch interfaces to improve collaboration. Find out why one firm gave every employee a Microsoft Surface and the surprising impact that followed.

- Learn power tips for taking notes on your tablet
- Find out which SaaS reporting tools work best on tablets
- Discover how to use tablets to improve staff retention and hiring