Houston IIA
2nd Annual Conference

Continuing the Tradition of Learning

April 18th 2011
Reliant Center

www.houstoniiia.org
The 2nd Annual Conference of the Houston IIA will be held on April 18, 2011, at the Reliant Center. Don’t miss out on this spectacular event! We have keynote speakers from the IIA and a Fortune 500 Company. You will hear session speakers sharing their tools and techniques in an innovative and creative manner. Whether you want to learn the inside track to complex audits, upgrade your IT auditing skills, increase your fraud awareness, improve your leadership success, or enhance your soft skills, look no further. We have something for everyone.

**Highlights**

- General Session Address by Richard Chambers, President and CEO of the Institute of Internal Auditors!
- Luncheon Session by Janet Clark, Executive Vice President and CFO of Marathon Oil Corporation. Janet was also named Forbes One Hundred Most Powerful Women In The World in 2009
- 8 hours of CPE with 20 break-out sessions.
- Breakfast, lunch, and a post-conference networking reception.
- Vendor booths and an opportunity to network with conference sponsors

*All early registrants are eligible to win two First class domestic roundtrip tickets***!

**Schedule**

- Registration is from 7:30 AM – 8:15 AM
- Training sessions are from 8:15 AM – 4:45 PM
- Networking reception is from 4:45 PM – 6:00 PM

**For Sponsor/Exhibitor Opportunities**

Please contact Larry Davis at ldavis@stewart.com for more details.

**For Volunteer Opportunities**

Please contact Angel Butler at abutler@uhy-us.com for more details.
Registration Information

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<th>Registration Fees</th>
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<tr>
<td>Member of Houston IIA</td>
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<td>Non-member</td>
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<td>Members who are educators, retirees, FT students, or unemployed</td>
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Registration Details & Instructions

- If you are a Houston Chapter member, you must log in before you register in order to receive the member discount.
- Please verify that the pricing is correct before submitting payment online.
- Cancellations made on or before March 21st will be fully refunded. There are no refunds after March 21st.
- Substitutions (same price category) can be made until Friday, April 1st at no additional charge.
- If you have any questions, or if you are paying by check, please contact Connie Khawaja at connie.khawaja@us.gt.com before you complete the registration process.

Group Registration

- Groups of five or more from the same organization receive a discount of $50 off per person.
- In order to receive the group discount, groups of 5 or more have to sign up in one registration.
- If you are registering a group, please use the blue “search” hyperlink located on the left side of the registration form to add members to your registration.

Accommodations

The Crowne Plaza (8686 Kirby Drive) has reduced-rate accommodations of $99/night for a standard room for reservations made by March 27, 2011. Call 713-748-3221 and mention the “IIA Annual Houston Conference” for booking. The Crowne Plaza is conveniently located down the street from Reliant Center.

Reliant Center Parking

Entry to this event will be through Gate 10 at McNee and Kirby. The parking fee will be $10, cash only, and payable upon entry. No in/out privileges.
**General Session Speaker**

*Richard Chambers, President and CEO Institute of Internal Auditors*

In his role at the helm of the internal audit profession's global authority, standard-setter, and educating body, Richard F. Chambers is responsible for driving the profession and the many undertakings of The Institute of Internal Auditors (IIA). Working from IIA Global Headquarters in Altamonte Springs, Fla., Chambers advocates for IIA members in 165 countries.

Chambers actively heads The IIA Global Headquarters’ leadership team in developing the global business infrastructure and framework that supports The IIA’s institutes around the world and advances the organization’s strategic priorities. As the spokesperson for the internal audit profession, Chambers is a visible presence on behalf of The IIA’s membership. He leverages 35 years of internal audit and related experience to challenge internal auditors to think more deeply about how they view their roles and what they can do within their organizations to build and preserve stakeholder value. He also has championed high personal and professional standards for internal auditors around the world — even in developing countries — and his ideas and opinions frequently have been covered by the media.

Among his many areas of focus since coming to his post early in 2009, is Chambers’ commitment to and involvement in ensuring The IIA enhances its relevancy to chief audit executives (CAEs) and internal audit professionals globally. Under his direction, The Institute enhanced and launched new services to address urgent needs facing CAEs, substantially increased the caliber of timely internal audit thought leadership, and successfully navigated fiscal challenges brought on by the global economic crisis.

Prior to becoming IIA president and CEO, Chambers served as national practice leader in Internal Audit Advisory Services at PricewaterhouseCoopers (PwC), where he worked closely with CAEs of major global corporate clients to develop and implement strategic internal audit solutions. From 2001 to 2004, Chambers worked at IIA Global Headquarters as vice president of The Learning Center, overseeing educational programs and products, research, and certification. Chambers spent the majority of his early career in public sector auditing. He served as Inspector General of the Tennessee Valley Authority; Deputy Inspector General of the United States Postal Service; and Director, US Army Worldwide Internal Review Organization at the Pentagon. He held various internal audit positions with the US General Accounting Office (now the Government Accountability Office).

Chambers serves on the Board of the Committee of Sponsoring Organizations of the Treadway Commission (COSO). Chambers’ contribution to strong internal controls and effective governance is also evidenced by experience on the U.S. President’s Council on Integrity and Efficiency, and the City of Orlando, Fla. Audit Board. When not employed by The IIA, he held numerous IIA volunteer leadership positions on The IIA Board of Directors, Government Relations Committee, Internal Audit Standards Board, International Conference Committee, and North American Board.

Chambers is a Certified Internal Auditor (CIA), a Certified Government Auditing Professional (CGAP), and a Certified Government Financial Manager (CGFM); and has a Certification in Control Self-Assessment. Chambers received his Bachelor of Business Administration and Master of Business Administration degrees from Georgia State University, and a Master of Arts degree in International Relations from Salve Regina University. He is a graduate of the U.S. Army War College.
Janet F. Clark, Executive Vice President and CFO  Marathon Oil Corporation

Janet F. Clark is executive vice president and chief financial officer of Marathon Oil Corporation. Clark joined Marathon on January 5, 2004 with a strong background in financial management and energy industry experience.

She began her career as an investment banker specializing in corporate finance, primarily with The First Boston Corporation, predecessor to Credit Suisse First Boston.

In 1997, Clark joined Santa Fe Energy Resources, Inc. as chief financial officer. Following the merger of Santa Fe Energy and Snyder Oil in 1999, she assumed the role of executive vice president of Corporate Development and Administration, with responsibility for corporate development, internal auditing, human resources, information technology, purchasing, office services, security and environmental, health and safety.

Clark joined Nuevo Energy in 2001 as senior vice president & chief financial officer. While at Nuevo, she was responsible for all finance, accounting, investor relations and information technology functions within the company, serving as the direct point of contact with investment and commercial banks, Wall Street analysts and rating agencies.

In 1977 Clark earned a Bachelor of Arts degree in Economics from Harvard University and a Master of Business Administration degree in Finance in 1982 from the Wharton School of the University of Pennsylvania.

Clark serves on the Board of Directors of Exterran Holdings, Inc., which trades on the New York Stock Exchange under the ticker symbol EXH. She also serves on the Board of three non-profit organizations: The Houston Symphony, YES Prep Public Schools, and Greater Houston Community Foundation. Clark also serves on the Rice University-Jones Graduate School of Management Council of Overseers. Additionally, she has recently been named to the Forbes One Hundred Most Powerful Women In The World and to the Houston Woman Magazine’s Houston’s 50 Most Influential Women of 2010.
## Program Matrix

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Session Details & Schedule

General Session and Keynote Address - 8:15 – 9:30 am

GS 1 2011 Trends and Challenges: The Outlook for Internal Auditing
*Richard Chambers*, President and CEO Institute of Internal Auditors

Session 1 - 9:50 – 11:00 am

CS 1-1 CAATs on a Shoestring: How to Use Excel to Emulate the Power of ACL
*Jeff Kromer*, The University of Texas Southwestern Medical Center

In today’s economy, auditors are undoubtedly looking for ways to be more effective, but on a low budget. This session will explore cost-effective methods using Microsoft Excel for computer-assisted audit techniques (CAATs) to perform many of the same functions available in more expensive audit software packages such as ACL and IDEA. In addition, we will discuss control issues in using Excel as well as some third-party tools to expand the power of Excel for developing CAATs.

Attendees will learn about:

- Limitations in using Microsoft EXCEL for CAATs
- Data tests and data manipulation techniques with Excel
- CAAT control issues in using Excel
- Best practices for control of Excel
- Third party tools to enhance Excel’s usefulness with CAATs

CS 1-2 Internet Fraud Opportunities in the Current Economic Environment: A New and Deadlier Generation of Attacks
*Richard Cascarino*, Richard Cascarino & Associates

Since the early days of computer technology, data has always been vulnerable to fraudulent and malicious attacks by insiders and outsiders to the organization. Recent cases in the newspapers have highlighted the vulnerability of organizations both commercial and governmental to security breaches caused by carelessness. There is, however, a new generation of attackers who will exploit the vulnerabilities within the existing and future technology and who are in a position to bring large scale networks to a grinding halt and to remove the faith in the integrity of information without which the first world economy cannot continue.

This session examines the types of attack which are possible using the vulnerabilities of current and future technology and explores some of the potential control mechanisms which have become vital to organizational survival including the advent of social networking.

CS 1-3 Auditing The Cloud: Not All Clouds Are Created Equally
*Norman Comstock*, UHY Advisors

Cloud Computing is a subject permeating the business scene with greater frequency. There is a gold rush of vendors pitching innovative solutions with compelling economics which contrast markedly to the traditional approaches of installed environments behind the corporate firewall. Look before you leap! Not all clouds are created equal. Internal audit can play an important role in evaluating or auditing a cloud solution. As with many evolving technologies there are inherent business, process, and technical risks that need to be addressed by the provider and the buyer.
CS 1-4  Ten Ways to Measure the Success of Internal Auditing

Larry Hubbard, Larry Hubbard & Associates

How do you know if internal auditing is successful? How do you know if it is adding value? Recent publications in IIA Practice Guides and the Common Body of Knowledge provide many ideas, but what is actually being measured in audit departments? Based on many Quality Assurance Review projects and working with internal auditors all over the world, Larry will share his real-world, back-to-basics view of how IA departments can know if they are meeting their organization’s needs.

CS 1-5  Question Everything! Asking Questions that Encourage Critical Thinking and Uncover Underlying Assumptions

Don Levonius, The Institute of Internal Auditors

- Discover the timeless truths of ancient masters that will add clarity, insight, and relevance to your audit communications, fieldwork, and observations
- Apply practical communication techniques that uncover underlying inferences, assumptions, perspectives, and implications
- Prepare to conduct meetings and interviews that facilitate critical thinking and promote higher-level awareness

Session 2 - 11:20am – 12:30 pm

CS 2-1  Deceptive Deals: Auditing Complex Vendor Contracts

Sharon Grant, United Airlines

Explore the methodologies for evaluating effectiveness of strategic sourcing justification and monitoring of contract effectiveness. Special emphasis will highlight red flags of poor vendor management and intent to deceive. Sharon will provide investigation examples: what they were, how found, how handled, and how corrected.

CS 2-2  The Monster Fraud List: Developing a Comprehensive Library of Fraud Detection Tests

Vincent Walden & Scott Clary, Ernst & Young

Learn the top anti-fraud detection tests around asset misappropriation, bribery & corruption and financial misstatement fraud schemes. The presenters have compiled a "monster list" of hundreds of anti-fraud tests and will share some of their most popular and effective tests for you. From duplicative payments, fictitious vendors, ghost employees and conflicts of interest all the way to revenue recognition and kickback schemes, we will demonstrate and provide case studies of effective use of these data analytics techniques in a simple, easy-to-follow format and methodology using new technologies in text mining and statistical analysis.

CS 2-3  Increased Risk of Virtualized Computer Environments

Shawn Lafferty & Tauseef Ghazi, KPMG

IT Virtualization was not designed with security in mind. Besides the traditional security risks, virtualization has introduced complexity into the IT environment that results in a new set of threats to be managed. Walk with us through this presentation as we;

- Define IT Virtualization
- Discuss the business impact of these security risks, and
- Present internal audit considerations for a IT Virtualized environment
CS 2-4  Core Competencies for Today’s Internal Auditors

*Larry Harrington, Raytheon Company*

Do you know the core competencies that internal auditors must possess today? This session will identify the attributes of an effective internal audit activity and what internal auditors really need to know to perform their jobs. We will discuss the results of the IIA’s analysis of core competencies based on survey results from over 13,500 members and nonmembers in more than 107 countries.

CS 2-5  E-mail With Clarity

*Barry Mohn, Speak and Write, Inc.*

Learn to write action-oriented messages and avoid the costly back-and-forth correspondence that commonly occurs from unclear e-mails. This session will provide you with techniques to write meaningful subject lines, structure and highlight key information, trim sentence fat, and effectively get your message across. In addition, you’ll learn to strike the right tone in order to prevent miscommunication and potential personnel issues. The tips and techniques in this session can be implemented the very next time you open your e-mail.

Luncheon Session and Keynote Address - 12:30 – 1:50 pm

GS 2  The Evolving Role of Internal Audit

*Janet F. Clark, Executive Vice President and CFO, Marathon Oil Corporation*

Session 3 - 2:05 – 3:15 pm

CS 3-1  Use of ACL in Healthcare and Beyond

*Joanne Ouellet & Deanna Pichon, The Methodist Hospital*

This session will address opportunities to use ACL for improving your organization’s bottom line. Data-mining is a core competency for every internal audit shop. The presenters will highlight how they used ACL to produce value-added internal audit results in Account Payable, Charge Capture, and Contract Compliance.

CS 3-2  Major Embezzlements: When Minor Fraud Risks Become Strategic Threats

*Toby Bishop, Deloitte*

Embezzlements are rarely large enough to be a cause of major concern to directors, officers and other members of management. However, under at least four circumstances embezzlements can prove almost as damaging as financial statement fraud in terms of financial and reputational risk. With some regulators reportedly now viewing a major embezzlement as an indicator of weak internal controls, companies may face regulatory restrictions on their strategic expansion in key growth markets if they cannot demonstrate they are applying current tools and techniques to mitigating this risk. Our speaker will present four circumstances in which major embezzlements can undermine business strategy. He will discuss, in his engaging and lively presentation style, ten things internal auditors can do to mitigate this risk or to help detect it earlier if it occurs.
CS 3-3  **Best Practices Framework: Key Ingredients in the Recipe for Success**  
*Shelia Anderson, Grant Thornton*

If you are experiencing what you consider to be high operational costs, project overruns, processes that are painful or technology that doesn’t support business needs, there are recipes for relief. Having the right recipe makes all the difference. Technology is a key ingredient and one which must be taken in appropriate measure. You’ll have the opportunity to learn more about information technology frameworks to include COBIT, ITIL®V3, and PMBOK in order to:

- Understand the context for each framework
- Identify their applicability to your environment
- Navigate risks successfully
- Integrate people, process and technology perspectives
- Realize maximum benefits

CS 3-4  **Managing Next Generation Auditors**  
*Harold Silverman, Houghton Mifflin Harcourt Publishing Company*

Attendees at this session will have the opportunity to gain perspectives on:

- Generational differences regarding work/life balance expectations
- Differences in work styles between Gen Y, Gen X and Baby Boomers
- Leading practices in recruiting, motivating and retaining Gen Y staff
- Challenges in managing a generationally diverse team

CS 3-5  **How to Have Courageous Conversations**  
*Michelle DeVeau, MD Anderson Cancer Center*

This session will introduce participants to a new way of communicating (1) who they are, (2) what they believe, and (3) what they wish to accomplish as a person and a leader one conversation at a time. The training will surface and discuss behaviors that interfere with our ability to effectively communicate with others for results. By identifying these behaviors we hope to acknowledge the overall impact on organizational effectiveness and target and practice techniques to overcome these challenges (i.e., interactive exercises and role plays).

**Session 4 - 3:35 – 4:45 pm**

CS 4-1  **A New Age in the Energy Industry: A Panel Discussion**  
*Larry Abston, Anadarko Petroleum Corporation, Lyn Beaty, Halliburton, Faye Stallings, El Paso Corporation*

Defining events, technological advancements, new regulations and social responsibility are a few of the key drivers dramatically changing the operational and risk landscape of both our domestic and global energy industry. This rapid pace of change creates unique challenges and risks requiring continuous realignment by internal audit groups to be of value to the business. In this session you will hear from three progressive CAE’s representing the upstream, midstream and services sectors of the energy industry. They will share their views on the impact of these dynamic times and how they are transforming the delivery and skill capabilities of their internal audit functions to be relevant to their stakeholders.
Some of the topics attendees will hear the panelists explore include:

- Emerging areas of interest to Audit Committees;
- Governance approaches to take ERM to the next level;
- Assessing the exposures of our technology dependent industry;
- Compliance and operational impacts of new and evolving domestic onshore and offshore regulations, permitting and safety processes;
- Increased anti-corruption scrutiny and the UK Bribery Act;
- Implications embedded in the Dodd-Frank legislation;
- Challenges of operating outside the US; and
- Addressing the knowledge sharing gaps in organizations.

CS 4-2 **Fraudulous**  
*Pamela Verick, Protiviti*

The name says it all. Don’t miss this entertaining and engaging discussion on the "juicy" elements of fraud.

CS 4-3 **The Changing Landscape of Information Security**  
*Less Stoltenberg & Shane Sims, PricewaterhouseCoopers*

The threat of cyber attack is increasingly coming from a broader range of individuals and entities. This new breed of hacker understands cyber vulnerabilities and how to exploit them. And they play by a new set of rules. PricewaterhouseCoopers has a long history of helping companies understand their security landscape and helping management align security needs with business requirements. We have helped our clients analyze and respond to the sophisticated and targeted attacks companies face today. This experience helps us understand gaps in standard safeguards and how to build enhanced safeguards to bridge these gaps. Our discussion will cover the following topics:

- Importance of information security
- Industry trends
- Cyber threat landscape
- Consequences of a breach
- Responding to the threat and/or a breach
- Capabilities required
- Crisis management
- Executives’ role in security

CS 4-4 **A Well-Balanced Work Plan: Adding Consulting Services to the Menu**  
*Lyon Smith, Academy*

Is your audit program stuck in a rut? Are you tired of always playing the role of the “auditor”? If you’re looking for ways to liven up your annual plan, look no further! In this session, Lyon will walk you through several creative ways that your department can add value through consulting! By putting different packaging around some of the traditional audit techniques and adding a few creative methods, you can create consulting service lines that clients will actually request. You might even change the entire perception of your department. Not only will you be making an impact on the organization, you’ll be adding to the skill set of your team, and making your department a more attractive place to work.
Why can’t everyone be like me? Ever have this thought and think the world would be so much more efficient if it was? Sadly, we can’t make everyone like you but we can help you understand the differences and help you work better as a team. This interactive course allows participants to get to know their own working style in order to gain a new perspective of the value they bring to a team. Next, they will use this new knowledge to recognize the working styles of those around them in order to adapt their working style accordingly. The goal is to better understand themselves and the teams that they work in to improve efficiency and effectiveness.

Conference Committee

Conference Chair - Deanna Sullivan, SullivanSolutions

Programs - Sherri Magnus, M. D. Anderson Cancer Center

Administration - Connie Khawaja, Grant Thornton

Facilities/Logistics - Carrie Richardson, United Airlines

Marketing - Rumy Jaleel-Khan, Deloitte

Sponsors - Larry Davis, Stewart Title

Volunteers - Angel Butler, UHY Advisors