


CPE Session Details



The information below applies to all sessions unless otherwise specified in the session details:

Event	IRIS INSPIRE 2025 User Conference
Location	JW Marriott Grande Lakes in Orlando, Florida
Dates	May 18th to May 20th 2025
Registration	Pre-registration is not required. Attendance & departure will be recorded at each session.
Who Should Attend	Programs are prepared for those attending the 2025 IRIS Inspire User Conference who have knowledge of an IRIS software and/or those who have an interest in new offerings being presented by IRIS and Sponsors.
Prerequisite	Basic knowledge of your firm's processes & procedures
Advanced Preparation	None
Field of Study	Business Management & Organization
Delivery Method	Group Live
CPE Credit	1 hour (Credits are based on a 50-minute credit hour, one credit equals 50 minutes)
Refunds and Cancellations	Programs are free and included in the conference registration. Requests for conference refund or cancellation must be received via email to AmericasAR@irisglobal.com no later than 10 days prior to the event start date. Refunds are issued in the same format as payment was received.
Additional Information	For information regarding issues or complaint policies, please contact Dee Hambly at Dee.Hambly@irisglobal.com
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SUNDAY, MAY 18 TH			
Session Name		Integrations Workshop	
Date	Sunday, May 18, 2025	CPE Credit	1
Time	1:00 PM - 2:00 PM	Program Level	Basic
Description	Explore common integrations for STAR and Practice Engine by delving into how they are implemented to streamline operations and enhance efficiency. We'll discuss the benefits of integrating with key systems, including XCM, GL, and CRM tools, highlighting how these connections can drive seamless workflows and improved outcomes. Join us to gain valuable insights and practical guidance on leveraging integrations to maximize the value of your systems.		
Learning Objectives	<ol style="list-style-type: none"> 1. Evaluate the Application Integration Model. 2. Identify the tools of integration at your firm and assess how they apply to a successful integration. 3. Analyze the in-depth example of the Apxium integration for payment processing and how it relates to the model. 4. Identify actionable insights and best practices for implementing and optimizing integrations in your organization. 		

Session Name	Advanced Productivity Features in Doc.It		
Date	Sunday, May 18, 2025	CPE Credit	1
Time	1:00 PM - 2:00 PM	Program Level	Basic
Description	Dive into the latest updates, features, and enhancements in Doc.It. Gain practical insights into leveraging these updates for maximum impact in their practices.		
Learning Objectives	1. Identify updates, features, and enhancements in Doc.It that would be helpful to your firm. 2. Evaluate how to effectively use new tools to improve firm productivity. 3. Apply new tools and features to optimize firm resources.		
Session Name	Product Exploration Workshop: Payroll		
Date	Sunday, May 18, 2025	CPE Credit	1.5
Time	1:00 PM - 2:30 PM	Program Level	Basic
Description	This is an exclusive session designed for customers to actively participate in the co-creation of the next generation of IRIS Payroll solutions. This workshop will provide a collaborative environment where customers can share insights, discuss their evolving needs, and explore the latest product enhancements and innovations. Attendees will have the unique opportunity to shape future product development that align with their business goals.		
Learning Objectives	1. Actively collaborate in the co-creation of the next generation of IRIS Payroll solutions by sharing insights and ideas with other customers and the product team. 2. Discuss the changing needs of your business and how upcoming product enhancements can address those challenges. 3. Evaluate the latest product updates and innovations, with a focus on how they can improve your operations and align with your goals. 4. Contribute to the development of future IRIS solutions by providing feedback that will help shape product features and functionality.		
Session Name	Product Exploration Workshop: Accountancy		
Date	Sunday, May 18, 2025	CPE Credit	1.5
Time	3:00 PM - 4:30 PM	Program Level	Basic
Description	This is an exclusive session designed for customers to actively participate in the co-creation of the next generation of IRIS Accountancy solutions. This workshop will provide a collaborative environment where customers can share insights, discuss their evolving needs, and explore the latest product enhancements and innovations. Attendees will have the unique opportunity to shape future product development that align with their business goals.		
Learning Objectives	1. Actively collaborate in the co-creation of the next generation of IRIS Accountancy solutions by sharing insights and ideas with other customers and the product team. 2. Discuss the changing needs of your business and how upcoming product enhancements can address those challenges. 3. Evaluate the latest product updates and innovations, with a focus on how they can improve your operations and align with your goals. 4. Contribute to the development of future IRIS solutions by providing feedback that will help shape product features and functionality.		
Session Name	Product Exploration Workshop: Swipeclock Base Camp Live		
Date	Sunday, May 18, 2025	CPE Credit	2
Time	2:00 PM - 4:00 PM	Program Level	Basic
Description	Base Camp Live has something for everyone. Whether you're the owner or work in sales, operations, or marketing - receive valuable information for you and your team to excel with our products. If you're considering partnering with Swipeclock, join us and get an inside look at our solutions and the team you'll be working with. We have unique partnership programs tailored to help you succeed, and we're excited to show you how we do partnership better.		
Learning Objectives	1. Analyze the Swipeclock partnership options. 2. Identify opportunities available as a Swipeclock partner. 3. Plan a strategy to maximize the benefits of a Swipeclock partnership for your firm.		

Session Name	Billing Workshop		
Date	Sunday, May 18, 2025	CPE Credit	1
Time	2:15 PM - 3:15 PM	Program Level	Basic
Description	A hands-on workshop with the focus on the transformative benefits of automated billing in Practice Management. Discover how Practice Engine and STAR's billing capabilities can simplify your billing processes, improve accuracy, and save valuable time. We will learn how to leverage PE's Scheduled and Recurring Bills, as well as STAR's Auto Billing and e-Billing. Gain practical insights into setting up and optimizing these features to enhance efficiency and ensure consistent revenue flow. Whether you're new to automated billing or looking to refine your approach, this session will provide actionable strategies to elevate your billing operations.		
Learning Objectives	<ol style="list-style-type: none"> 1. Analyze the Benefits of Automated Billing. 2. Evaluate the advantages of using automated billing tools at your firm. 3. Identify automated billing features to enhance operational efficiency and improve overall billing accuracy. 4. Develop strategies for leveraging automated billing systems to maintain consistent and reliable revenue flow. 		
Session Name	Apex HCM - Advanced Import & Data Extract Wizard		
Date	Sunday, May 18, 2025	CPE Credit	1
Time	2:15 PM - 3:15 PM	Program Level	Basic
Description	In today's fast-moving world, speed is everything, especially when it comes to bringing on new clients and handling their data. That's where ApexHCM by IRIS steps in. With smart tools like data import features, Rapid Reports, and the Export Wizard, you can make on-boarding new businesses faster, smoother, and way more efficient. Want to impress your clients and stay ahead of the game? Learn how to leverage these tools to quickly on board and easily connect with your clients' systems and partners—no headaches, no delays.		
Learning Objectives	<ol style="list-style-type: none"> 1. Speed Up Onboarding: Explain how ApexHCM's Import tools to make onboarding new clients faster, smoother, and less stressful. 2. Bulk Data Like A Pro: Evaluate Rapid Reports ability to import large batches of employee data edits. 3. Time File Hacks: Apply proper time import formatting and build two easy, reusable templates you can share with your clients. 4. Next-Level Integrations: Create custom export files that plug right into your clients' systems. 		
Session Name	Work Smarter, Not Harder with iChannel Automation		
Date	Sunday, May 18, 2025	CPE Credit	1
Time	2:15 PM - 3:15 PM	Program Level	Basic
Description	Efficient document management is essential for modern CPA firms. Manual processes, disconnected systems, and compliance demands can slow operations and increase risk. Explore how workflow automation can transform document management from a tedious task into a strategic advantage. Gain insights into best practices for automating document workflows, reducing manual tasks, and enhancing collaboration and compliance across their firm.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify the 3 types of automating document workflows. 2. List 2 benefits of using iChannel automation at your firm. 3. Develop a plan for automating one manual process that will have significant impact on efficiency and accuracy. 		

Session Name	BPA, PowerBI & Reporting Workshop		
Date	Sunday, May 18, 2025	CPE Credit	1
Time	3:30 PM - 4:30 PM	Program Level	Basic
Description	Showcase how clients can harness the power of BPA within their Practice Management software to stay ahead in a competitive industry. Learn how to unlock the full potential of your current product, streamline operations, and drive efficiency. This discussion sets the stage for the upcoming "Unlocking the Power of IFM Reporting" session later in the conference, offering foundational insights to help you optimize workflows and prepare for advanced reporting capabilities.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify how BPA enhances practice efficiency and integration. 2. Discover ways to optimize existing reporting capabilities in PE & Star. 3. Evaluate Power BI as a complementary reporting tool. 		

MONDAY, MAY 19TH			
Session Name	IFM Progress - One Year Ago to Today		
Date	Monday, May 19, 2025	CPE Credit	1
Time	10:00 AM - 11:00 AM	Program Level	Basic
Description	Delve into the evolution of IRIS Firm Management (IFM) over the past year. Examine advancements in features, usability, and client outcomes. Learn how the platform has addressed industry challenges, how firms have benefited from adoption, and what lies ahead in its innovation roadmap.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify the key changes and enhancements in IFM over the last year. 2. Analyze case studies implementation strategies and how the firms maximized their use of the platform's capabilities. 3. Evaluate the roadmap for IFM and discuss how these planned innovations can address emerging challenges in firm management. 		
Session Name	Payroll Trends, Tech, and Tactics for Success		
Date	Monday, May 19, 2025	CPE Credit	1
Time	10:00 AM - 11:00 AM	Program Level	Basic
Description	As payroll operations continue to evolve, staying ahead of industry trends is crucial for firms to remain compliant, efficient, and competitive. Explore the critical payroll trends expected to shape the industry in 2025 and beyond. From emerging technologies like AI and automation to evolving regulatory landscapes and workforce management challenges, this session will equip attendees with the insights needed to future-proof their payroll strategies.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify how the workplace and workforce are different today vs. ten years ago. 2. Analyze the top ten trends across people, processes and technology impacting the payroll landscape. 3. Identify three actions that can be taken today to prepare for and respond to these trends. 		
Session Name	Payroll Compliance: Breaking Down Forms, Calculations, and Risk		
Date	Monday, May 19, 2025	CPE Credit	1
Time	10:00 AM - 11:00 AM	Program Level	Basic
Description	As regulatory frameworks evolve, payroll professionals must stay ahead of compliance trends to avoid costly mistakes and maintain operational excellence. Explore the latest updates in payroll compliance, with a focus on key forms, critical calculations, and emerging legislative impacts. Attendees will leave with actionable insights and strategies to streamline compliance processes and mitigate risks.		
Learning Objectives	<ol style="list-style-type: none"> 1. Recognize recent regulatory changes impacting payroll compliance, including updates to (a) federal, (b) state, and (c) local requirements. 2. Compare the functional differences of the various flexible work models and impacts on tax liability. 3. Analyze Payroll application updates planned for TY2025. 		
Session Name	Scaling the Smart Way: Growth Through Acquisition		
Date	Monday, May 19, 2025	CPE Credit	1
Time	11:10 AM - 12:10 PM	Program Level	Basic
Description	Engaging discussion panel designed to provide firms with a platform to explore strategies, challenges, and opportunities in data management and business growth. This session will highlight insights from IRIS and other industry leaders on how effective data utilization and management can drive business growth while maintaining operational integrity. Topics include overcoming challenges with system mergers, addressing data inconsistencies, and aligning company goals. Discover how leveraging data integration can become a springboard for operational efficiency, scalability, and long-term success.		
Learning Objectives	<ol style="list-style-type: none"> 1. Evaluate how effective data management can support business growth and maintain operational integrity. 2. Identify strategies for overcoming challenges such as system mergers and data inconsistencies. 3. Discuss how data integration can enhance operational efficiency and scalability for long-term success. 4. Formulate a plan for aligning data management practices with firm goals to drive growth and success. 		

Session Name	The Path to Penalty Relief: Expert Insights on IRS Abatement		
Date	Monday, May 19, 2025	CPE Credit	1
Time	11:10 AM - 12:10 PM	Program Level	Basic
Description	Penalties and interest from the IRS can have a significant financial impact on individuals and businesses. This session dives deep into the IRS abatement process, providing CPAs with the tools, strategies, and knowledge to navigate complex abatement scenarios and secure successful outcomes for clients. Attendees will gain actionable insights on how to effectively advocate for their clients, mitigate penalties, and manage the abatement process from start to finish.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify the different types of IRS Penalty Abatements. 2. Develop clear, compelling written requests for penalty relief, including necessary documentation and evidence to support abatement claims. 3. Develop Best Practices for preventing future penalties. 		
Session Name	Keeping Pace with Change: KYC/AML Compliance Trends		
Date	Monday, May 19, 2025	CPE Credit	1
Time	11:10 AM - 12:10 PM	Program Level	Basic
Description	Discover the latest trends and challenges in Know Your Customer (KYC) and Anti-Money Laundering (AML) compliance. As global regulatory standards evolve, accounting professionals must stay ahead of these changes to mitigate risks and ensure compliance. Gain actionable insights into the most recent developments, tools, and strategies for staying compliant in 2025 and beyond.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify Anti-Money Laundering practices outlined in KYC. 2. Analyze Federal and State regulations around money transmission. 3. Evaluate Best Practices for conducting effective due diligence, assessing customer risk profiles, and managing red flags to minimize exposure to money laundering activities. 4. Plan policies and procedures to implement to protect your firm and employees against fraud. 		
Session Name	Enhancing Month-End Processes for Practice Management		
Date	Monday, May 19, 2025	CPE Credit	1
Time	1:30 PM - 2:30 PM	Program Level	Basic
Description	Gain actionable strategies and tools to streamline month-end processes. Attendees will explore best practices for closing the books efficiently, leveraging technology to enhance accuracy, and implementing workflows that foster collaboration and compliance.		
Learning Objectives	<ol style="list-style-type: none"> 1. Recognize inefficiencies and bottlenecks in traditional month-end workflows that impact accuracy and timeliness. 2. Identify Best Practices for streamlined Month-End Closures. 3. Evaluate processes to enhance collaboration and access to critical financial data during and immediately after the closing process. 4. Design a tailored action plan that aligns with your firms goals and integrates continuous improvement strategies for long-term success. 		
Session Name	Document Management API and Integration Capabilities		
Date	Monday, May 19, 2025	CPE Credit	1
Time	1:30 PM - 2:30 PM	Program Level	Basic
Description	Explore API and integration capabilities within Doc.It by IRIS and iChannel by IRIS. Learn how these features drive efficiency, enhance collaboration, and streamline workflows for accounting and payroll professionals. Through practical examples, attendees will learn to leverage APIs to connect disparate systems, automate processes, and unlock new levels of productivity.		
Learning Objectives	<ol style="list-style-type: none"> 1. List integrations commonly used with accounting, payroll, and business applications. 2. Discuss how API's can reduce errors and efficiency. 3. Propose practical uses for APIs to automate repetitive tasks. 		

Session Name	The Future of Work: HCM Trends Redefining the Workforce		
Date	Monday, May 19, 2025	CPE Credit	1
Time	1:30 PM - 2:30 PM	Program Level	Basic
Description	Explore the critical trends reshaping Human Capital Management (HCM) as we move into 2025 and beyond. From evolving workforce expectations to new technologies and compliance requirements, we'll discuss how organizations can stay competitive, compliant, and agile in an ever-changing global workforce landscape.		
Learning Objectives	<ol style="list-style-type: none"> 1. Recognize the key trends driving change in HCM, including AI-driven workforce management, hybrid work models, and talent retention strategies. 2. Analyze upcoming regulatory changes and their impact on workforce management, payroll, and employee benefits. 3. Explore how next-gen HCM technologies can streamline operations, enhance employee engagement, and improve decision-making. 4. Create actionable strategies for workforce planning that align with future business goals, balancing scalability, compliance, and employee experience. 		
Session Name	Price Increase University		
Date	Monday, May 19, 2025	CPE Credit	1
Time	1:30 PM - 2:30 PM	Program Level	Basic
Description	CPAs and business leaders will be presented with knowledge and tools to effectively manage price increases while maintaining customer loyalty, sustaining growth, and optimizing profits. Discover the core principles, strategies, and practical steps for implementing price increases in today's competitive market.		
Learning Objectives	<ol style="list-style-type: none"> 1. Describe key psychological factors that affect how clients perceive price hikes. 2. Develop strategies for justifying price increases to clients. 3. Identify the right timing and methods for implementing price increases. 4. Compare software tools and data analytics to make informed decisions about price adjustments, ensuring they align with market demands and business objectives. 		
Session Name	Different Perspectives: The Journey of Implementing Practice Management		
Date	Monday, May 19, 2025	CPE Credit	1
Time	2:40 PM - 3:40 PM	Program Level	Basic
Description	Implementing practice management software is not a one-size-fits-all journey. This session dives into the implementation process from both the firm's and the vendor's perspectives, providing insights into overcoming common challenges, aligning expectations, and ensuring seamless adoption. Receive actionable strategies to lead successful implementations, create value for your teams, and build stronger vendor partnerships.		
Learning Objectives	<ol style="list-style-type: none"> 1. Compare the implementation process from both the firm's and vendor's viewpoints to identify potential alignment gaps. 2. Identify common implementation roadblocks. 3. Evaluate the implementation process for effective planning, stakeholder engagement, timeline management, and clear communication during each stage. 		
Session Name	Optimizing STAR Practice Management: Performance, Productivity & the Path to the Cloud		
Date	Monday, May 19, 2025	CPE Credit	1
Time	2:40 PM - 3:40 PM	Program Level	Basic
Description	This session is designed to equip you to improve your Star Performance and get you ready to move to the Cloud and IFM. Dive into the latest Best Practices for optimizing SQL Server and IIS. Gain practical insights and tools to improve performance and productivity. Learn how to assess your firm's readiness to move to the Cloud and IFM.		
Learning Objectives	<ol style="list-style-type: none"> 1. Compare SQL Server and IIS Best Practices to your environment. 2. Assess the SQL Server performance recommendations. 3. Identify tools to help your firm identify performance issues. 4. Evaluate and plan your firm's Cloud Readiness & move to IFM. 		

Session Name	Beyond 9-to-5: Embracing Gig and Alternative Workforces		
Date	Monday, May 19, 2025	CPE Credit	1
Time	2:40 PM - 3:40 PM	Program Level	Basic
Description	The rise of the gig economy and alternative employment models is reshaping the workforce landscape. CPA firms and HR professionals must adapt to this shift, balancing flexibility with compliance, and strategic growth with worker satisfaction. Explore the legal, operational, and financial considerations for leveraging gig workers and non-traditional employment arrangements while maintaining compliance and optimizing workforce efficiency.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify the key characteristics of the gig economy and alternative employment models. 2. Analyze the tax, legal, and compliance implications of hiring gig workers, independent contractors, and flexible employees across various jurisdictions. 3. Develop strategic approaches for integrating gig and alternative workers into existing organizational structures to enhance agility, productivity, and talent acquisition. 4. Design workforce management policies that balance flexibility and compliance, ensuring a positive employee experience and minimizing risks related to worker misclassification. 		
Session Name	The Art of the Deal: Positioning your Firm for a Lucrative Exit		
Date	Monday, May 19, 2025	CPE Credit	1
Time	2:40 PM - 3:40 PM	Program Level	Basic
Description	Mergers and acquisitions (M&A) are reshaping the accounting and payroll industries. Whether you're looking to retire, merge with a larger entity, or pivot your firm to new leadership, preparing for a successful exit requires strategic planning, valuation optimization, and operational readiness. Industry experts will guide you through the key steps to maximize your firm's value, minimize risks, and execute a seamless exit strategy.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify the key financial, operational, and market factors that drive valuation for accounting and payroll service firms in M&A transactions. 2. Discuss a step-by-step roadmap to prepare your firm for a sale, including financial audits, technology assessments, and team readiness. 3. Propose how to position your firm to attract strategic or financial buyers and navigate the negotiation process to ensure favorable terms. 4. Develop strategies for addressing common M&A challenges including client retention, staff transition, and regulatory compliance to maintain business continuity post-sale. 		
Session Name	Lean on Me! Technology in Support of a Lean Process featuring Marcil Lavallee		
Date	Monday, May 19, 2025	CPE Credit	1
Time	4:30 PM - 5:30 PM	Program Level	Basic
Description	Learn how to use Lean and Technology to transform your processes and unlock new levels of productivity.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify one process where you could use Lean to eliminate waste in the process. 2. Compare the Lean tools and technique examples to your firm processes. 3. Plan strategies for employee adoption of process transformation and new technologies. 		
Session Name	Leveraging Swipeclock for Smarter Workforce Management		
Date	Monday, May 19, 2025	CPE Credit	1
Time	4:30 PM - 5:30 PM	Program Level	Basic
Description	Swipeclock's time management capabilities can help organizations align with current Human Capital Management (HCM) trends, offering tangible benefits for both businesses and their clients. Explore the latest features of Swipeclock, from automated timekeeping to advanced scheduling and compliance management, while also understanding how these tools can increase efficiency, reduce labor costs, and enhance employee engagement.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify how Swipeclock's time management features align with current Human Capital Management (HCM) trends to drive business success. 2. Evaluate the latest features of Swipeclock, including automated timekeeping, scheduling, and compliance management. 3. Describe how Swipeclock's tools can increase operational efficiency and reduce labor costs. 4. Propose how Swipeclock's capabilities can improve employee engagement and overall satisfaction for your firm. 		

Session Name	Unlocking the Power of IFM Reporting: Integrating APIs, Power BI, and Cutting Edge Tech		
Date	Monday, May 19, 2025	CPE Credit	1
Time	4:30 PM - 5:30 PM	Program Level	Basic
Description	In today's data-driven world, managing and leveraging financial information efficiently is key for firm growth. Dive into how IRIS Firm Management (IFM) reporting, combined with APIs, PowerBI, and supporting technologies, can elevate the way CPAs interact with and analyze their financial data. Learn practical techniques for transforming data into insights and driving productivity across firm operations.		
Learning Objectives	1.Recognize how seamlessly connecting IFM with external systems can boost data efficiency and reduce manual effort. 2.Analyse how to turn raw IFM data into dynamic visuals to unlock real-time insights and smarter reporting. 3.Discover complementary tools that elevate IFM's automation and reporting potential. 4.Design a plan to equip your teams with intelligent reports to support faster, more strategic business decisions.		
Session Name	FedNow		
Date	Monday, May 19, 2025	CPE Credit	1
Time	4:30 PM - 5:30 PM	Program Level	Basic
Description	Prepare to dive into the future of instant payments and discover how the FedNow Service is set to reshape the financial landscape. What impact do you think instant payment infrastructure will have on our industry? Join the conversation and share your thoughts!		
Learning Objectives	1. Assess how FedNow will mitigate fraud and NSF risks for your firm. 2. List pros and cons between ACH and FedNow. 3. Appraise the value of FedNow for your firm with the information presented.		

TUESDAY, MAY 20TH			
Session Name	Generate Lasting Business Growth with Swipeclock Partnership		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	10:30 AM - 11:30 AM	Program Level	Basic
Description	Discover the inspiring success stories of top partners and learn how they've effectively utilized Swipeclock to drive exceptional results. Through their testimonials, gain valuable insights into how these industry leaders have leveraged partnerships to achieve their goals, optimize processes, and create lasting value in their respective fields.		
Learning Objectives	<ol style="list-style-type: none"> 1. Compare how top partners have effectively utilized Swipeclock to drive business success and achieve exceptional results. 2. Explain how industry leaders leverage strategic partnerships to optimize processes and reach their goals. 3. Identify key ways Swipeclock has been used to create lasting value and improve operational efficiency in various fields. 4. Create actionable strategies from partner testimonials to enhance your own organization's performance and value creation. 		
Session Name	The Next Chapter of IRIS Firm Management: Continuing the Vision Beyond 2025		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	10:30 AM - 11:30 AM	Program Level	Basic
Description	Gain an exclusive look at the future of IRIS Firm Management (IFM) and how the solution will continue to evolve to meet the needs of modern CPA firms. From new features and integrations to enhanced automation and AI capabilities, this session will outline how IFM will empower firms to drive operational excellence, unlock new revenue opportunities, and remain competitive in an evolving accounting landscape.		
Learning Objectives	<ol style="list-style-type: none"> 1. Evaluate the strategic vision and how it aligns with the evolving challenges and opportunities in the accounting industry. 2. Analyze insights into upcoming product enhancements, including automation, AI-driven insights, and new integrations. 3. Identify implementation best practices. 4. Propose future industry trends influencing the development of IFM 		
Session Name	The Future of IRIS Payroll		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	10:30 AM - 11:30 AM	Program Level	Basic
Description	Explore the exciting future of IRIS Payroll in this visionary session. We'll share the strategic roadmap and highlight upcoming developments designed to empower businesses with innovative solutions. Gain insight into how IRIS Payroll is evolving to meet industry demands, improve efficiency, and deliver greater value. This session offers a glimpse into what's ahead, ensuring you stay informed and prepared to leverage the next generation of payroll technology.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify 3 of the top Payroll & HCM trends that are shaping the IRIS strategy. 2. Analyze what's been accomplished since last year's INSPIRE conference. 3. Evaluate the strategic IRIS Payroll & HCM roadmap. 4. Summarize the features coming in the next 12-18 months. 5. Prioritize the top requests to help co-create the short and long-term roadmap. 		
Session Name	HR 2.0: Transforming Processes with AI & Automation		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	10:30 AM - 11:30 AM	Program Level	Basic
Description	Explore the transformative power of Artificial Intelligence (AI) and automation in HR processes. Learn how these technologies are revolutionizing talent management, payroll, compliance, and employee experience. The session will highlight practical applications, success stories, and the essential steps to adopt AI-driven HR solutions.		
Learning Objectives	<ol style="list-style-type: none"> 1. Describe how Artificial Intelligence and automation are transforming talent management, payroll, compliance, and employee experience. 2. Compare real-world examples and success stories of AI-driven solutions in HR processes to your firms processes. 3. Identify the essential steps for implementing AI technologies to enhance HR operations. 4. Propose how AI and automation can streamline HR processes, improve accuracy, and drive your business success. 		
Session Name	Power of the Portal: Present and Future in Document Management		

Date	Tuesday, May 20, 2025	CPE Credit	1
Time	11:40 AM - 12:40 PM	Program Level	Basic
Description	Discover how the iChannel and IFM Portal can transform your daily operations by automating essential tasks. View a comprehensive demonstration of the Portal's capabilities, highlighting how it streamlines workflows, minimizes manual effort, and boosts productivity. Learn practical strategies to leverage automation for enhanced efficiency and focus on delivering exceptional results and how it will evolve!		
Learning Objectives	1. Describe how the iChannel portal automates essential tasks to streamline workflows and reduce manual effort. 2. Identify practical strategies for using iChannel to concentrate on high-value tasks. 3. Propose ideas for automating processes with the iChannel portal that can improve workflows and productivity.		
Session Name	Igniting Firm Efficiency: The Integration of Business Central and IRIS Firm Management		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	11:40 AM - 12:40 PM	Program Level	Basic
Description	Explore how the seamless integration between Microsoft Dynamics 365 Business Central and IRIS Firm Management (IFM) can revolutionize accounting firm operations. Dive deep into the benefits, practical applications, and technical considerations of integrating these two powerful solutions to streamline processes, enhance data flow, and boost productivity.		
Learning Objectives	1. Identify the key advantages of connecting Business Central with IRIS Firm Management. 2. Evaluate how the integration optimizes critical processes like billing, invoicing, financial reporting, and client management by creating a unified ecosystem. 3. Discover insights into the technical setup, configuration, and customization required for a smooth integration between Business Central and IFM. 4. Analyze how this integration can drive scalability to enable smarter decision-making for accounting firms, ultimately positioning them for long-term success.		
Session Name	The Future is Integrated: Advancing Payroll and HCM Integrations		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	11:40 AM - 12:40 PM	Program Level	Basic
Description	Explore the critical importance of integrating Payroll and Human Capital Management (HCM) systems to streamline operations and deliver enhanced value to clients. Attendees will gain insights into existing integrations and best practices for building offerings that seamlessly connect Payroll with HCM functionalities, improving efficiency and reducing errors. Dive into how these integrations support the future of the workforce, enabling businesses to make more informed decisions, automate processes, and deliver a unified employee experience.		
Learning Objectives	1. Analyze the value of payroll and HCM integrations. 2. Identify integrations that would be beneficial for your firm. 3. Plan how to design and implement integrations to get the most from your current solutions.		
Session Name	IFM Productivity Suite		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	1:45 PM - 2:45 PM	Program Level	Basic
Description	Join us for an in-depth demonstration of the exciting new upcoming features in IFM. This session will highlight how these updates are designed to enhance productivity and streamline workflows, providing tangible benefits to your daily operations. We'll share an exclusive look at the roadmap for the next iteration, offering insights into the long-term vision for the suite. Don't miss this opportunity to stay ahead of the curve and see what's in store for the future of IFM!		
Learning Objectives	1. Identify the proposed new features designed to enhance productivity and streamline workflows. 2. Evaluate how the new features can provide tangible improvements to your firm's daily operations. 3. Recognize the long-term vision through an exclusive look at the roadmap for upcoming iterations. 4. Collaborate on the future direction of IFM Productivity Suite.		

Session Name	Bridging the Gap: Navigating the Generational Divide in Management		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	1:45 PM - 2:45 PM	Program Level	Basic
Description	Explore the generational gap in management and provide actionable insights for fostering collaboration across diverse age groups in the workplace. Learn how the distinct perspectives, communication styles, and leadership preferences of different generations can be used to create strategies for managers to effectively navigate these differences and create a more cohesive, productive team environment.		
Learning Objectives	<ol style="list-style-type: none"> 1. Identify the key traits and values of each generation in the workforce. 2. Recognize how communication preferences vary by generation 3. Develop strategies to bridge the gaps for more effective communication and collaboration. 4. Propose how to harness the strengths of a multi-generational workforce to improve problem-solving, innovation, and team performance. 		
Session Name	Practice Audits and IFM FAQs		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	3:00 PM - 4:00 PM	Program Level	Basic
Description	In today's competitive market, accounting and Payroll Firms must go beyond traditional services to thrive. Gain actionable strategies to drive sustainable business development and client engagement, helping firms unlock new revenue streams, improve client retention, and position themselves for long-term growth.		
Learning Objectives	<ol style="list-style-type: none"> 1. Recognize how to create tailored business development approaches that address the specific needs of different client segments. 2. Summarize how leveraging CRM, data analytics, and automation tools can enhance growth efforts. 3. Evaluate how strategic partnerships, networking, and co-branding opportunities can accelerate growth and expand service offerings. 		
Session Name	How A Strategic Partnership with Swipeclock Can Expand Your Business		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	3:00 PM - 4:00 PM	Program Level	Basic
Description	An in-depth exploration of partnership and ecosystem opportunities, highlighting strategies to optimize collaboration and deliver tailored solutions. This comprehensive approach focuses on understanding unique needs, identifying synergies, and maximizing value, ensuring both partners and their clients receive exceptional support and impactful results.		
Learning Objectives	<ol style="list-style-type: none"> 1. Recognize strategies to optimize collaboration within partnerships and ecosystems. 2. Describe approaches to ensure both partners and their clients receive exceptional support and measurable results. 3. Develop an actionable plan to strengthen partnerships and drive mutual success. 		
Session Name	Proven Business Development Tactics for Accountants and Payroll Leaders		
Date	Tuesday, May 20, 2025	CPE Credit	1
Time	3:00 PM - 4:00 PM	Program Level	Basic
Description	This interactive session will empower attendees to leverage Practice Audits as a tool for evaluating firm operations, compliance, and productivity. We'll answer frequently asked questions and explore how to align your firm's processes with industry best practices.		
Learning Objectives	<ol style="list-style-type: none"> 1. Recognize how to create tailored business development approaches that address the specific needs of different client segments. 2. Summarize how leveraging CRM, data analytics, and automation tools can enhance growth efforts. 3. Identify strategic partnerships, networking, and co-branding opportunities to accelerate growth and expand service offerings. 		



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