



AZ Valley
of the Sun
Chapter

The Roadrunner

May 2018

Volume 19, Issue 11

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National Small Business Week

Every year since 1963, the President of the United States has issued a proclamation announcing National Small Business Week, which recognizes the critical contributions of America's entrepreneurs and small business owners. More than half of Americans either own or work for a small business, and they create about two out of every three new jobs in the U.S. each year.

As part of National Small Business Week, the U.S. Small Business Administration takes the opportunity to highlight the impact of outstanding entrepreneurs, small business owners, and others from all 50 states and U.S. territories. Every day, they're working to grow small businesses, create 21st century jobs, drive innovation, and increase America's global competitiveness.

Led by the U.S. Small Business Administration, #SmallBusinessWeek recognizes outstanding small business owners and entrepreneurs throughout the United States and in U.S. territories. From Sunday, April 29 through Saturday, May 5, the SBA will be livestreaming award ceremonies along with announcing the National Small Business Person of the Year. Other activities slated include a three-day virtual conference from May 1 to 3, co-hosted by SCORE and a Twitter chat on Friday, May 4 about tips for starting and growing a business.

Now more than ever before, National Small Business Week matters for entrepreneurs and small businesses of all sizes. Entrepreneurs also help create two out of every three new jobs in the United States, yearly. Since the week-long event was first issued in 1963, the number of small businesses created has continued to rise. Fewer businesses are failing, too. Although it is quite popular to cite startup failure statistics — particularly in their first year — the reality is that 50 percent of small businesses survive five years or more in business.

Learn more at www.sba.gov.



The May issue of *The Roadrunner* newsletter focuses on small businesses. The IMA provides resources for members to succeed in small business. Interpersonal, governance, leadership, staff management, risk along with technical accounting and finance are important skills when you wear many hats in a small business. Take advantage of all IMA offers through local, national and online education and certification.

AZ Valley of the Sun Chapter President's Message

Dear IMA AZ Valley of the Sun Chapter Members,

We are quickly approaching the end of the year for the Arizona Valley of the Sun Chapter and with it, my time as chapter president. I would like to thank our 2017-18 board members for their time and talents over the course of the year as well as those of you who have participated in and attended the chapter events. I have enjoyed my time as president and highly recommend the experience to anyone interested in developing their leadership skills. You will have the opportunity to work with a great group of people.

Results for the 2017-18 chapter competition are in and we had another outstanding year. We placed 9th in the Stephenson Division. We were also awarded silver in the Newsletter, Community Service and Public Relations and runner up in social media. Our GCU chapter was awarded the Gold Award of Excellence for the second consecutive year and Donna DeMilia has been selected as the Ursel K Albers IMA Campus Advocate of the Year Award recipient... a well-deserved recognition of the services she has provided to GCU and IMA.

We are currently making plans for the upcoming year and have several open positions available on our local chapter board. If you are interested in taking on a leadership role, serving our members and helping plan events, please contact our 2018-19 president, Kendall Argust. We are also reviewing our venue and educational content for the coming year and welcome your participation and/or suggestions. Your Arizona Valley of the Sun board is dedicated to providing our members great programs and service. Please let us know if you have any suggestions or ideas on how we can better serve you.

Sincerely,

Tom Dopler, CMA, MBA

IMA AZ Valley of the Sun Chapter

2017-2018 President

Share Your Story as We Celebrate 100 Years

IMA® (Institute of Management Accountants) will celebrate its 100-year Anniversary in 2019, and as we look to the future, we invite you to help us celebrate the past. This month, we're launching a social media effort to gather member stories of what it means to be part of IMA. Over the next year, we'll be asking a series of questions on social media and asking you to submit your personal observations and recollections. It doesn't have to be long – one or two sentences will do. Also feel free to post videos or photos as well.

We invite you to share, on your own personal social media channels using the hashtag **#IMA100Years**, Why you're proud to be an IMA member. Your best memory as an IMA Conference participant. How IMA has supported your career.

We'll be announcing these topics – and others – on our social media channels and will be using the content we receive from you to create a special 100-year website. As part of this effort, we'll also be sharing the history of IMA and key highlights of our 100-year journey on our social media as well.

For questions or more information about submitting your stories on social media, please contact Morgan Del Rio, IMA marketing and social media manager, at morgan.delrio@imanet.org. If you'd like to submit a longer, more in-depth story, IMA's flagship magazine, *Strategic Finance*, is seeking submissions from members on their favorite personal experiences with IMA or how the profession has changed over the years. Contact Editor-in-Chief Kathy Williams at kwilliams@imanet.org for more information or to share your IMA story. IMA's 100-year celebration will kick off at our [Annual Conference & Expo](#) (ACE2018) in Indianapolis this June. It will culminate at our Annual Conference & Expo in San Diego in June 2019. Don't miss either one!

Small Business Administration - Learning Center

The SBA offers a variety of online courses to help you start and run your business. Visit their website at www.sba.gov/learning-center for courses to help you plan, launch and grow your business.

How to Write a Business Plan

This course explains the importance of business planning, defines and describes the components of a business plan, and provides access to sample plans and resources that can help you develop a very good business plan.



Social Media Marketing

Are you using Social Media to help increase sales of your product or service? Do you lack the basic knowledge to take advantage of the incredible marketing reach that social media offers? This course is designed to show you how to utilize social media marketing to grow your business. You will learn research processes and strategies to help you harness the power of social media marketing.

Understanding Your Customer

Knowing your customer is a vital part of effectively selling your product or service. This course will introduce you to tools and resources that will help you understand your customer and increase sales.



SBA's All Small Mentor-Protégé Program

This tutorial is designed to help you answer the question, "Is SBA's All Small Mentor-Protégé Program a good fit for my business?" You will be provided relevant details to inform the answer to that question to include learning how small businesses fit into the federal buying marketplace.

Small Business Resources from SCORE

SCORE and the U.S. Small Business Administration (SBA) co-sponsored a three-day virtual conference during National Small Business Week, Tuesday, May 1 through Thursday, May 3, 2018. The webinars are all available on-demand at www.score.org/recorded-webinars.

[How Changing Consumer Behavior Impacts Your Business](#) In this webinar by [Google](#), learn how the latest technological insights can help shape your digital marketing plan, and what you can do to position your business for success.

[Addressing Discrimination and Harassment in the Workplace](#)[Paychex](#) discusses workplace discrimination, harassment, and specific policies and procedures for handling complaints, investigations, and retaliation to help protect your employees and your business.

[Get New and Repeat Business On Autopilot with Email Marketing](#) In this webinar by [Constant Contact](#), we'll show you some simple ways to bring in sales from new and existing customers repeatedly with email marketing.

[Creating and Sustaining a Strong Social Presence](#)[Vistaprint](#) explains why your small business should be on social media and some easy-to-use tips and tricks for small business owners to improve or create strong social media campaigns.

[Managing Your Finances in the Cloud](#) This session by [Intuit](#) uncovers many reasons why businesses are moving their finances to the cloud and discuss some best practices in how to use this technology to keep your business relevant and nimble.

[Simple Steps to Choosing the Right Financing](#)[OnDeck](#) explains which financing options are right for different types of businesses and how likely you are to get approved.

[Hug Your Haters: How to Embrace Complaints & Keep Your Customers](#) In this webinar sponsored by [Chase](#), Jay Baer, founder of Convince & Convert, reveals brand-new, proprietary research into why and where your customers complain and why the rise of customer complaints is actually an enormous opportunity.

[Sharing Your Story Through Video](#) Learn best practices for connecting with consumers through online video in this session by [Google](#).

[Pop & Play: How Opening a Pop-Up Shop Can Help Launch Your Retail Brand](#) In this webinar by [Kimco Realty](#), find out how a pop-up can help you bring your brand to life, create a one-of-a-kind customer experience and tell your brand's unique story to a built-in audience.

[Fusion Marketing: The Next Generation of Marketing](#) Examine how can you leverage the fusion of traditional, digital and social media marketing tools, accomplish each objective you set and see exponential results without spending a dime.

NATIONAL SMALL BUSINESS WEEK VIRTUAL CONFERENCE

May 1 - 3, 2018

12:30 - 6:30 PM EDT / 9:30 - 3:30 PM PDT



Leadership Academy Webinar

Essential Team Skills

June 5, 2018

Presenter: Heather Nusbaum, CMA, IOM NASM Master Trainer Vice President Finance & Administration
Greater Killeen Chamber of Commerce

Event Description Team building is an extremely important part of organizational leadership and critical to both an individual's and organization's success. Through the use of teams, we can:

Increase effectiveness, efficiency, and productivity; Improve the quality of decisions, plans, and solutions to problems; Develop greater creativity at higher levels of thinking; and Develop people to their maximum potential and compete more successfully. We don't just survive... we thrive.

Learning Objectives After this webinar, you will be able to:

1. Define a team and how a team differs from other kinds of groups.
2. Identify characteristics of the ideal team.
3. List benefits of team building for the individual and the organization.
4. Identify underlying principles that contribute to effective team building.
5. Describe how the characteristics of collaboration facilitate team building.

Price: Free

CPE Credit: 1.5 hours

Field of Study: Personal Development

Research Area: Business Leadership & Ethics

Program Level: Basic

Prerequisite: None

Advanced Preparation: Download Participant Guide

Instruction Method: Group Internet

Visit the IMA Global Website www.imanet.org for more webinars and registration.

IMA Wild West Council

2017-2018 Board

President	Camille Cook	ccookie2179@aol.com
Past President	Deb Michalowski	debmichalowski@gmail.com
President-Elect	Stuart Gibb	sgibb@srnature.com
Global Director	Nancy McCleary	nancy.mccleary@ga.com
Treasurer	Patrick Wilson	patrickkwilson@hotmail.com
Secretary	Di Wu	dwu2@csub.edu
VP Administration	Mitch Lenoil	mlenoil@social.rr.com
VP Chapter Relations	Pem Smith	pem.smith64@gmail.com
Director - Webmaster	Pem Smith	pem.smith64@gmail.com
Associate Webmaster	Nancy McCleary	nancy.mccleary@ga.com
Associate Webmaster	Deb Michalowski	debmichalowski@gmail.com
Director - Social Media	Kendall Argust	kendall.argust@gmail.com
VP Meetings & Education	Kathleen Hurley	kathurley101@gmail.com
Director - Meetings	Don Bradshaw	dbradshaw@ivc.edu
Director - Meetings	Open	
Director - Meetings	Kelly Benner	kbtrain@msn.com
Director - Meetings	Open	
Director - CMA Promotion	Derek Heijmans	heijmansdc@gmail.com
Chapter Mentor	Don Hartman	don@donhartmancpa.com
Chapter Mentor	Diane Hewlett	dianephx928@gmail.com
Chapter Mentor	Frank Garcia	garciaflm1@yahoo.com
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Chapter Mentor	Jim Carr	j011254@cox.net
Chapter Mentor	Mitch Lenoil	mlenoil@social.rr.com
Chapter Mentor	Bob Gove	robert.gove@cox.net
Chapter Mentor	Carolyn Reis	carolyn.reis@cox.net
Director at Large	John Campbell	jcampbell96@cox.net
Director at Large	Celeste Porter	Cporter@gazelletrans.com
Director at Large	Billie Drake	drake14@cox.net
Director at Large	Bob Gove	robert.gove@cox.net
Director at Large	Carolyn Reis	carolyn.reis@cox.net

Get Social with the IMA Wild West Council



www.facebook.com/imawildwestcouncil

@IMAWWC



Accounting & Financial Women's Alliance
CONNECT • ADVANCE • LEAD



The Association of
Accountants and
Financial Professionals
in Business

2018 Empowering Today's Accountant Seminar
Friday May 18, 2018 8:00am - 5:00pm
Sheraton Mesa Hotel at Wrigleyville West
860 N Riverview, Mesa, AZ 85201

The Accounting & Financial Women's Alliance Mesa East Valley Chapter and the Institute of Management Accountants AZ Valley of the Sun Chapter are presenting the 12th Annual Empowering Today's Accountant Seminar. Attendees will earn 8 hours of CPE from a mix of technical & professional development sessions. Expand your professional network by joining AFWA and IMA members for a day of education and networking.

	Regular Registration	Early Registration
AFWA / IMA Member Registration:	\$150	\$100
Regular Registration:	\$200	\$150
Student Registration:	\$50	\$50

Early Registration Deadline: March 18, 2018 Final Registration Deadline: May 4, 2018

Seminar details and registration available at www.mesaeastvalleyafwa.org/seminars.

The AFWA Mesa East Valley Chapter is hosting the AFWA National Board and Foundation Board for their 2018 Installation and Spring Meetings. Seminar attendees can support the Foundation fundraising activities throughout the seminar. A special dinner installation event will follow the seminar with separate registration.

IMA AZ Valley of the Sun Chapter
Net Tech Session & Awards Night
May 15, 2018

Date: Tuesday, May 15, 2018

Time: Tour 4:00-5:00 / Networking 5:30pm - 6:00pm / Dinner 6:00pm - 6:40pm / Session: 6:40pm - 7:30pm

Topic: IOT Demo Tour at Intel/IOT and Accounting for Software Sales

Speaker: Deb Michalowski

Session Description: We are very fortunate to have Deb Michalowski, IOTG Finance Risk & Controls Business Specialist at Intel speak to us on May 15th. Deb leads IOTG Risk & Controls Compliance Programs and Roadmap for Finance covering several initiatives in this role. She partners closely with IOTG Risk & Controls Operations Program Owner as well as interfaces with both Finance and Operations in all IOTG Business Units. She spearheaded the Intel Finance Professional Certification Program (FPCP), an element of Intel Finance Development programs. FPCP provides cross site CPE events, information regarding certifications and acumen building networking opportunities.

Amount of CPE: 1 hour tour / 1 hour evening session

Tour Location: Intel, CH6, 5000 Chandler Blvd, Chandler, AZ 85226

Evening Location: Phoenix Airport Marriott 1101 N. 44th St. Phoenix, AZ

Cost: \$40 Members, \$45 Guest, \$7 Student

Save the Date - Upcoming Net-Tech Session Topics

May 15th - Technology Tour / Awards Night

June 12th - Business Legislative Update

July 17th - Economic Forecast

Aug 21st - Brewery Tour



ACE2018 | INDIANAPOLIS

IMA's Annual Conference & Expo

INFINITE POTENTIAL

JUNE 16-20, 2018 | JW MARRIOTT INDIANAPOLIS

Early Registration Deadline March 31st

Explore 9 Specialty Tracks designed for management accountants:

Planning, Budgeting, and Forecasting	Strategy and Competitive Analysis
Small Business and M&A	Technology
Financial Close and Reporting	Accounting Hot Topics
Leadership and Professional Development	Ethics
Governance, Risk Management, and Internal Controls	

Choose from 70+ sessions to customize your learning experience
Earn 29 NASBA credits
Network and share experiences with 800+ attendees
Experience Indianapolis — A *Travel + Leisure* Top 20 U.S. City
Details at www.imaconference.org

Hotel Information: JW Marriott Indianapolis 10 S. West Street Indianapolis, IN 46204

Guest Room Rates: IMA has negotiated a special Conference price of \$199 per night, single or double occupancy, exclusive of applicable state and local taxes (17%). Please note the hotel will provide complimentary guest room internet. Please reference Group Code 2018 IMA Conference when making reservations by phone (317) 860-5700, or you can [click here](#) to make reservations online.

This special Conference hotel rate will be in effect while rooms are available or until May 23, 2018. Reservations made after May 23, or after the IMA block sells out, may be subject to a higher rate. Currently, there is limited availability at the JW Marriott Indianapolis. There is no guarantee that rooms will still be available after May 23, so don't delay in making your arrangements.

Thank you for helping IMA meet its room-block obligation with the JW Marriott Indianapolis by booking your stay at this hotel. Your cooperation is greatly appreciated.

The logo for the Certified Management Accountant (CMA) exam, featuring the letters "CMA" in a serif font with a registered trademark symbol.

*IMA's Certification for
Accountants and
Financial Professionals
in Business*

The
CMA
Corner

Important Survey on Management Accounting

ICMA® (Institute of Certified Management Accountants) is conducting a job analysis study for the CMA® (Certified Management Accountant) exam.

Your input is an essential element of creating a test that is relevant, fair, complete, effective, and valid. **Your completed survey must be submitted by May 21, 2018 (11:59 pm ET).** We thank you in advance for taking the time to participate.

“Thank You” Gift Card Drawing:

Upon completion of the survey, you will have the opportunity to enter a drawing for one of eight Amazon gift cards: three \$500 USD, and five \$100 USD cards. Winners will be selected randomly from the pool of completed surveys.

INSTRUCTIONS FOR PARTICIPATION:

To access the survey: [Please click here.](#)

The survey will take approximately 60 minutes to complete. You do not have to complete the survey in a single session.

If you encounter any technical difficulties or have questions regarding the survey content, please contact Prometric, the organization conducting the survey on behalf of ICMA. Just email robert.corrigan@prometric.com with your question/issue and make sure to reference the ICMA Survey.

Remember, your completed survey must be submitted by May 21, 2018 (11:59 pm ET).

Thank you again for your time and for contributing your expertise.

Sincerely,

A handwritten signature in black ink that reads "Dennis Whitney".

Dennis Whitney, CMA
IMA Senior Vice President
Certifications, Exams, & Content Integration

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Contact Melissa Leonard at:
800.874.5346 Ext. 131
melissa.leonard@gleim.com
gleim.com

SUCCESS GUARANTEED!!



IMA AZ Valley of the Sun Chapter 2017 - 2018 Board of Directors

President	Tom Dopler	VP Communications	Julie Rossignoi
President-Elect	Kendall Argust	Email Distribution	Trey Ballard (P)
VP Administration	Kendall Argust	Asst Email Distribution	Diane Hewlett (P)
Treasurer	Brian Haberlin	Newsletter	Laura Mangan
Assistant Treasurer	Sean Baenziger	Publicity	Trey Ballard (P)
Secretary	Kerstin Hancock	Webmaster	Deb Michalowski (P)
		Asst Webmaster	Diane Hewlett (P)
		Asst Webmaster	Nick Stefaniak (P)
VP Education	Camille Cook (P)	VP Membership	open
Co-Director	Greg Gilstrap (P)	Member Relations	Travis Melham
Co-Director	Nick Stefaniak (P)	Member Acquisition	Scott Johns
Co-Director	Tom Dopler	Community Service	Chris Fritsch
Co-Director	Pam Zanzucchi (P)	Corporate Development	Travis Magneson (P)
Co-Director	Deb Michalowski (P)	Asst Corp Development	Deb Michalowski (P)
CMA Program	Yaman Nass	Asst Corp Development	Russell Gardner
Education Reporting	Greg Gilstrap	Employment	Chris Stich
Webcast Director	Kathleen Moren (P)	Student Relations	open
Meetings	Kendall Argust	SCST Scholarship	Donna DeMilia
		SCST ASU	Nick Stefaniak
		SCST Support	Mike Yost

Please contact Tom Dopler if you are interested in serving on the chapter board, on a committee or volunteering for an event. Email Tom at tomdopler@cox.net. Members are welcome to join us at monthly board meetings being held following the monthly net-tech sessions.

IMA AZ Valley of the Sun Chapter Member March Anniversaries

1-10 Years

Jared Hunsaker, CFE
 Natalie Ann Leatherwood
 Caitlin Ebbs
 Tim Johnson
 Christopher Lawrence Seagraves
 Jesus Trujillo
 Harry Preston White, CMA
 John Catellaneta
 John Pecusa, CITP
 Robert Scorso
 Jamie Lynn White, CMA
 Stacy Davison, CMA
 Yi-Fan Lai
 Spenser Devin Iatridis
 Sarah Hamre, CMA
 Lynne Turski
 Abel Uriarte
 Ted Kardasz, CPA
 Suzanne Hunsicker
 Nancy Kelley
 Julie Rossignol, CMA
 Gary D Morris, CPA
 Tanya Wood, CPA
 Laura Ann Watson, CMA, CPA
 April Eulalia Garcia
 Katrina Storjohann
 Richard Carlson, CMA
 Cynthia Thimmesch, CMA
 John Meyer, CPA
 Gavin Grainger, CMA

11-20 Years

Michael Feldman, CMA, CPA
 Amber Arnhold, CMA
 Douglas Taylor, CMA

21-30 Years

Scott Johnson, CMA
 Bryce Cook, CMA
 Gregory Cypert, CMA
 Diane Catlin, CMA, CBM
 Doris Garcia, CMA
 Gary Snyder, CMA, CPA
 Dennis Grove
 Torin Campbell, CMA
 Sara Moulton Reger, CMA

31-40 Years

Kent Alme, CMA, CPA
 Clarence Benedict

41-50 Years

Ruth Scherrer

50+ Years

William Dahl

Strategic Finance: Small Business - The Exit Strategy

In the February 2018 issue of Strategic Finance, the Small Business column by James Lane, EA shares some strategies to help develop your business into an enterprise with options to sell.

Building a business that gives you options requires deliberate planning for value creation. This begins with an exit strategy, a vision that you strive to fulfill. Most people who start a business hope to sell it for enough money to retire comfortably. So when we talk about vision, we're considering a couple of aspects. One is an operational vision—when you look at yourself coming in to work, what do you see? The other aspect is the final goal: What will it look like when you leave the business?

When starting a business, you as an individual travel a path from technician to businessperson to entrepreneur. If you want to develop your work into a business, you need to develop a new mind-set as an entrepreneur. Technicians have technical knowledge of their trade, and people are willing to pay for their expertise.

A business that will sell needs to have a history of making a profit with the 5 S's: system, specialize, subscription-based cash flow, scale, and story. Optimize your business by implementing a system of processes and controls to give traction to your vision and to develop a healthy team. To create a business you can eventually sell, your product or service needs to be scalable. Control the script that your sales force and employees use when they converse with customers. Make sure your website, your Facebook page, your Twitter feeds, and your 30-second elevator speech are telling the same story about the business you are building.

The ideal business will move toward a place where it can thrive on its own. Building this sort of business is what elevates the businessperson to an entrepreneur.

Read the full issue of IMA's Strategic Finance Magazine at sfmagazine.com.



Upcoming Chapter Event

May 8th

Board Meeting - Macayo's Tempe

May 15th

Technology Tour / Awards Night

Phoenix Airport Marriott

May 18th

Empowering Today's Accountant Seminar

Sheraton Mesa

June 12th

Business Legislative Update

Phoenix Airport Marriott

June 17th

AZVOTS / WWC Dinner

Indianapolis, IN

July 17th

Economic Update

Phoenix Airport Marriott

Vision Statement

Our vision is to be the resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals within business.

AZ Valley of the Sun Chapter

azvots.imanet.org

azvots.imanet@gmail.com



The Association of Accountants and Financial Professionals in Business

Mission Statement

IMA's mission is to provide a forum for research, practice development, education, knowledge sharing, and the advocacy of the highest ethical and best business practices in management accounting and finance. IMA currently represents more than 80,000 accountants and financial professionals in business. The participation of each of our members makes the success of our mission possible.

May 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8 Board Meeting	9	10	11	12
13	14	15 Net Tech Session	16	17	18 Seminar	19
20	21	22	23	24	25	26
27	28	29	30	31		

Reminders :

- Take advantage of free CPE, sign up for the monthly IMA webinars.
- New Net-Tech Session rates effective January
- IMA Annual Conference Early Registration deadline Mar 31st
- Empowering Today's Accountant Seminar Early Registration Deadline March 18th