

Cleveland East Chapter of IMA

Virtual Annual Controller's Workshop



Controller's Workshop

Free Virtual Event

Friday, November 17th

9:00 am – 1:00 pm

A 4 hour seminar for Controllers, CPAs, CMAs, CFMs and Accountants interested in staying up to date on topics of interest or new rules and laws.

- **Negotiation Skills**
- **Change Management**
- **Organizational Fraud**
- **2023 Tax Update**

[Register online today](#)

Stay for all 4 sessions and be entered into a drawing for a \$100 gift card!

SEMINAR OUTLINE

9:00 **Negotiation**

Gerald Ratigan, CMA, CSCA, CPA, CPIM, CHIA, CAHTA

Many people lack confidence in their ability to negotiate or at least think they could improve at negotiating. Gerald will examine how negotiation happens in all aspects of our lives every day, and then some of the tools that make negotiation easier and more effective. Build your skills to become a better negotiator.

10:00 **Measuring and Managing Customer Profitability for Business Success**

Dr. Raef Lawson, Executive Director, Profitability Analytics Center of Excellence

Managers are often surprised to learn that a small percentage of their customers generate substantially more than 100% of profits, and their remaining customers are either breakeven or unprofitable. Furthermore, they fail to realize that customers who are easy to acquire and retain may not yield the most profits. Raef will discuss the elements of customer profitability, how to measure it, and why most companies do it poorly. He will then discuss how companies can work to generate greater profits through their targeting, acquiring, and better managing customer efforts.

11:00 **How Good Employees Rationalize Bad Decision: A Look at Fraud in Today's Organizations**

Dr. Kristine Brands, Associate Professor at Regis University

A plethora of research shows that the people you work with and the culture you work around will affect behaviors, for better or worse. Kristine will explore organization fraud and how employee behaviors could result in organizational fraud.

12:00 **2023 Tax Update**

Dan Schrader, CPA, CCIFP

Dan will provide an update a tax update on important changes for 2023.



Program Speakers

Gerald Ratigan, CMA, CSCA, CPA, CPIM, CHIA, CAHTA

Gerald is acting Chief Accounting Officer CAO for The Gearbox Entertainment Company. Directed client through IPO readiness process and due diligence for \$1.2 Billion merger and acquisition by The Embracer Group AB. Sale transaction closed April 1, 2021 . He is a Global Board Director at IMA and board member of the Stuart Cameron McLeod Society. He is author, speaker, and coach.



Dr. Raef Lawson, CMA, CSCA, CPA, CAE, CFA, CFP

Dr. Lawson is an accomplished executive and thought leader leading the global research efforts at IMA, with proven success in designing and implementing world class research and policy programs. Extensive senior leadership experience in diverse settings, including for-profit and not-for-profit organizations. He is Executive Director at Profitability Analytics Center of Excellence. He is an award-winning author, global speaker and media contributor in the areas of performance management, sustainability, business ethics, corporate governance and accounting education. He is a Recognized Collaborative Leader - Creative, Innovative, Results Driven. Focused on Strategy, Innovation, and Execution.



Dr. Kristine Brands

Kristine Brands, CMA is an Assistant Professor of Management at the United States Air Force Academy in Colorado Springs, CO. She is a member of the IMA's Technology Solutions and Practices Committee and its Memorial Education Foundation. She was a subject matter expert for ISO 21378, Audit Data Collection. Her research interests include business analytics, accounting ethics, XBRL, accounting for sustainability, and the integration of technology in accounting courses. She teaches financial and managerial accounting, accounting ethics, AIS, and advanced auditing.

She has authored numerous columns for Strategic Finance, a dozen peer reviewed articles, and speaks nationally and internationally on accounting, technology, and ethics. She holds a BA in History from the University of Rochester, an MBA from Emory University, a Certificate in Applied Science from Harvard University Extension, and a Doctorate in Management from Colorado Technical University.



Dan Schrader CPA, CCIFP

Dan is Principal, CLA in the Canton office where he is a specialist in construction and real estate industries. He consults on projects in construction, retail and banking industries for numerous privately held companies as well as multiple Fortune 500 companies. He provides support to help them implement tax saving strategies, initiating accounting process improvements, helping to setup a global accounting shared service center, financial reporting support, corporate accounting, month-end close, internal control and external audit support. He has vast experience in tax, assurance, acquisitions and start-up engagements for many construction and real estate clients.