

2015 NATIONAL REGISTRY SUMMIT

September 9-11, Washington, DC

LEARNING IN ACTION

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Curtis Bonk

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Jason McKeever

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IMPORTANT DETAILS

Summit Wifi Code (beginning September 9): NRS15

Twitter Hashtag: #RegistrySummit

Download the Registry Summit App!

Wednesday evening networking opportunity: Sign up at the registration desk to attend dinner with colleagues at one of several area restaurants.

Exposure Draft of Proposed Changes

Red-lined Version of 2012 Standards

Executive Summary of significant changes proposed in the Exposure Draft

Information on Registry Summit 2016 in Tampa, Florida!



2015 National Registry Summit - Agenda

Wednesday, September 9, 2015

2:30 pm - 4:30 pm

Pre-Conference Workshop: Registry 101
Jeff Price, National Registry Administrator
Kathryn Turner, National Registry Administrator

This workshop will provide an overview of the Registry and the Statement on Standards for Continuing Professional Education (CPE) Programs (Standards). It will provide details on the more significant processes of the Registry: the initial or additional delivery method applications; the renewal process; and the desk audit process. The workshop will describe the instructional delivery methods addressed by the Standards and focus on the significant aspects of development, presentation, measurement and reporting of each method. The workshop will also highlight the obstacles to compliance with the Registry and the Standards, so that preventative procedures can be put in place. This workshop is intended for new sponsors and individuals who are new to their role in responsibility for Registry sponsorship.

2:30 pm - 4:30 pm

Pre-Conference Workshop: QAS Self Study – Application Process, Helpful Hints and Best Practices
Miki Klein, Instructional Design Administrator
Amanda McGregor, Instructional Design Administrator
Johnny Owsley, Instructional Design Administrator

This workshop will assist those sponsors considering applying for the QAS Self Study delivery method or those approved sponsors looking for helpful hints and best practices when developing self study programs. Our instructional design administrators will walk you through each step of the application process, including what information is reviewed and considered. Please come with



2015 National Registry Summit - Agenda

questions and take this opportunity to walk away with helpful hints for developing self study programs.

1:00 pm – 6:00 pm

Registration

No planned evening activity. Opportunity to meet up with your network of colleagues and enjoy the downtown Washington, D.C. area.

Thursday, September 10, 2015

7:30 am – 8:30 am

Breakfast

8:30 am – 8:45 am

Welcome Message

Alfonzo Alexander – President of NASBA Center for the Public Trust and Chief Relationship Officer of NASBA

A welcome from NASBA executives will inform participants of current focus projects of NASBA.

8:45 am – 10:00 am

*Learning is Changing: The Basics of Blended Learning and Beyond
Curtis J. Bonk, Professor, Instructional Systems Technology
Department, Indiana University*

Dr. Curtis Bonk, Professor at Indiana University, will provide an interactive presentation to help motivate learners in online and blended learning environments. Dr. Bonk will reveal best practices using his widely acclaimed R2D2 (Read, Reflect, Display, and Do) framework for instructional design with technology.

While detailing best practices he has seen around the globe, Dr. Bonk will also discuss how his method can be expanded or altered to fit one's preferences and needs. These ideas and techniques can be



2015 National Registry Summit - Agenda

linked to learner motivation, collaboration, interaction and general engagement in the learning process.

10:00 am – 10:15 am

Break

10:15 am – 11:30 am

How to Make Fabulous Video, Fast and Affordably
Jonathan Halls, Principal at Jonathan Halls & Associates

More and more learning professionals are turning to video as an important method to deliver short chunks of learning just in time to learners where they need it and when they need it. However, for learning video to be effective, it needs to be engaging and affordable.

Jonathan Halls, a media/corporate training consultant and author, will provide guidance on how to structure video content to draw learners in that looks professional and ensures retention. You will learn techniques used by professional broadcasters to speed up production without compromising quality. Learn how to do all of this on affordable consumer cameras!

11:30 am – 11:45 am

Statement on Standards for CPE Programs: Status Update
Jessica Luttrull, Associate Director-National Registry

This session will provide a brief status update related to the progress of the proposed revisions to the CPE Standards.

11:45 am – 1:00 pm

Lunch

1:00 pm – 2:30 pm

Break-Out Session - Deeper Dives

1 – Engage, Number One: This is the Next Generation
Curtis J. Bonk

Not done from the general session, Dr. Bonk will provide a deeper dive on best practices for online and blended learning, including his



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TEC-VARIETY model for learner motivation with Web technology. Each letter of the TEC_VARIETY model stands for a well know motivational principle (e.g., tone, encouragement, curiosity, variety, autonomy, relevance, interactivity, engagement, tension and yielding products). Walk away with practical strategies that can be incorporated directly into face-to-face, blended, and virtual programs.

2 – How to Make Fabulous Videos, Fast and Affordably **Jonathan Halls**

In greater detail, Mr. Halls will help learners determine what makes engaging learning content in terms of its ability to ensure engagement and retention. He will describe key differences in video techniques between mobile video, desktop video and video watched on a television screen. Take home techniques to structure content so it is easy to understand and draws on the strengths of video!

3 – Statement on Standards for CPE Programs **Jessica Luttrull**

This session is intended for participants that were not able to attend last year's National Registry Summit and have not reviewed the proposed revisions to the CPE Standards. Ms. Luttrull will walk through the proposed changes to the CPE Standards and highlight the more significant changes.

2:30 pm – 3:00 pm

Break - Reconvene in General Session

3:00 pm – 4:30 pm

Train Like a Rockstar: Speaking Tips From a Stand-Up Comedian
Jeff Birk, Speaker and Trainer

Jeff Birk is a corporate trainer and stand-up comedian who has opened for Jay Leno, Martin Short and Bill Cosby. His presentation



2015 National Registry Summit - Agenda

will share the key principles of engagement that he has learned from his 25+ years of performing in comedy clubs and conference rooms, alike. Body language, audience interaction, the art of storytelling, and of course, humor, are just some of the skills you will learn in this lively interactive session.

5:00 pm – 7:00 pm

Celebration Reception

Friday, September 11, 2015

7:30 am – 8:30 am

Breakfast

8:30 am – 9:15 am

Development Plans: Connecting CPE to Career Objectives
Eric Dingler, Director and Audit Chief Learning Officer
Deloitte

Eric Dingler, Director and Chief Learning Officer of Audit at Deloitte, will share the thought process and approach Deloitte uses to map out an effective career-long professional development plan, connecting learning with career objectives.

9:15 am – 10:30 am

Leveraging the Latest in Brain Science and Gamification to Meet the Needs of the Modern Learner
Carol Leaman, CEO at Axonify

With the explosion in brain research over the past 10 years, scientists know more about how to improve memory, attention and cognitive ability than ever before. In addition, gamification is redefining expectations and challenging our paradigms. How is the combination of brain science and gamification set to change the world of corporate learning? How will it meet the needs of the Modern Learner? Armed with the latest research from the world-



2015 National Registry Summit - Agenda

renowned Rotman Research Institute, join Carol Leaman, CEO of Axonify to discover how retention practices and game mechanics are being applied in eLearning tools in the workplace. You will gain real corporate examples of improvements in knowledge retention, learning transfer and the bottom-line.

10:30 am – 10:45 am

Break

10:45 am – 11:45 am

Panel: Sharing Innovative Delivery Method Ideas

Jason McKeever, Eide Bailly LLP

Matthew Murray, PwC

The trends and technology in the learning arena is changing rapidly and the manner and format preferences of learners is changing in response to the multi-generational CPA population. This session will be comprised of a panel of CPE providers who are exploring, piloting or using innovative delivery methods for CPE training. This will be an opportunity to share knowledge, ideas and pitfalls in considering innovations in learning.

11:45 pm – 12:00 pm

Closing Remarks



View inside the Capitol dome. The Capitol is the seat of the U.S. Congress and although it is not at the geographic center of D.C., it is the origin point for the District's street numbering system.



Attendees by Organization

20-20 services LLC
 APlusCPE®
 APlusCPE®
 Abacus-AT-e2, L.L.C.
 Accountancy Board of Ohio
 Accountancy Board of Ohio
 AICPA
 AICPA
 AICPA
 AICPA
 American Management Association
 Andersen Tax LLC
 Arthur Bell, CPAs
 Associated Regional Accounting Firms
 Axonify
 Baker Tilly Virchow Krause, LLP
 BDO USA, LLP
 BKD, LLP
 BKD, LLP
 Blackline, Inc
 BOOKE
 Boomer Consulting Inc.
 Boomer Consulting Inc.
 Business Professionals Network
 Business Professionals Network
 Business Valuation Resources, LLC
 CalCPA
 California Tax Education Council
 CAMICO Mutual Insurance Co.
 Capin Crouse, LLP
 Capin Crouse, LLP

Bo Fitzpatrick
 Melinda Vieira
 Ricki Ziemann
 Tom Gavin
 Robert Fay
 James Gottfried
 Michael Grant
 Tie Miller
 Clar Rosso
 Salena Wright
 Martha Leon
 Lori Morgan
 Bridget Ling
 JoAnn Labbie
 Carol Leaman
 Heather Eggers
 Evelyn Morse
 Greg Cole
 Gennifer Ramsay
 Thyra Hunter
 Russell Simpson
 Eric Benson
 Sue Thiemann
 James Parente
 Anne Taylor
 Jared Waters
 Janice Slusser
 Ruth Godfrey
 Sue Holl
 Terra Aguirre
 Debbie Evans

Capital One Financial Services, Corporate
 Audit and Security Services
 CBIZ, Inc.
 CBIZ, Inc.
 Central Methodist University
 Cherry Bekaert LLP
 Cherry Bekaert LLP
 Cisco Systems, Inc
 Cisco Systems, Inc
 CliftonLarsonAllen LLP
 Colorado Society of CPAs
 CORPTAX LLC
 Council of Petroleum Accountant
 Societies, Inc. (COPAS)
 Council of Petroleum Accountant
 Societies, Inc. (COPAS)
 Council of Petroleum Accountant
 Societies, Inc. (COPAS)
 CPE Depot
 CPEasy
 Crowe Horwath
 Crowe Horwath LLP
 D. Lynn Smith
 Deloitte LLP
 Dereje Tessema
 DirectorCorps, Inc.
 Eide Bailly LLP
 EisnerAmper LLP
 EisnerAmper LLP
 Ernst & Young LLP
 Federal Housing Finance Agency -
 Examiner Development Branch
 Federal Housing Finance Agency
 of Inspector General
 Federal Reserve Bank of Richmond
 Florida Institute of CPAs

Lindsay Skorupa
 Diane Leibson
 Phil Zaman
 Julee Sherman
 Karen McManus
 Christine Seredni
 Lisa Lavery
 Kristin White
 Elizabeth Spencer
 Rebecca Campbell
 Lynda Youngers

 Angie Knipe

 Donald Tharp

 Tom Wierman
 Frank Castillo
 Daniel Snider
 Brian Steinbauer
 Cindy Hessling
 D. Lynn Smith
 Eric Dingler
 Dereje Tessema
 Kaitlyn Gowdy
 Jason McKeever
 Gerri Migliacci
 Jenna Prager
 Rita Sehgal

 Alison Zink

 Kevin Thompson
 Vilma Alejandro
 Brenda Hubbard



Attendees by Organization

Furthered.com	David Schnurman	M&A Source	Ashley Uhl
General Conference Auditing Service	Maurine Wahlen	Maryland Association of CPAs	De'Landa Sullivan
General Motors Company	Barbara Hubbard	Maryland Association of CPAs	Debbie Zizwarek
General Motors Company	Margaret Hunter	Maryland Society of Accounting and Tax Professionals, Inc	Alverta Steinwedel
Georgia Society of CPAs	Jennifer Oleksa	Minnesota Society of CPAs	Lynn Kletscher
Gleim Publications, Inc.	Martha Willis	Moss Adams LLP	Melinda Roy
Global Association of Risk Professionals(GARP)	Will Liu	Multistate Tax Commission	Sherry Tiggett
Global CPE	Jeremy Rigsbey	Murtala Isah Iliyasu	Murtala Isah Iliyasu
Graduate School USA	Deborah Howie	National Association of College and University Business Officers (NACUBO)	Jeanne Cure
Grant Thornton, LLP	Amy Frederick	National Restaurant Association Executive Study Group	John Lehmann
Guam Board of Accountancy	Michele Santos	National Society of Tax Professionals	Nina Tross
Health Care Service Corporation	Felicia Mansfield	Netsuite, Inc.	Dave Schock
Healthcare Financial Management Association	Krystine Hansen	North American Professional Liability Insurance Agency, LLC	John Raspante
Indiana University	Curtis Bonk	North Carolina Association of Certified Public Accountants	Amanda Davis
Institute of Internal Auditors, Inc. (IIA)	Jim Eagen	North Dakota State Board of Accountancy	Faye Miller
Institute of Management Accountants	Joanne Hakim	Plante & Moran, LLC	Danielle Turner
IRS	Liz Kinney	Practising Law Institute	Andrew D. Ottiger
IRS Return Preparer Office	Sue Gaston	PricewaterhouseCoopers LLP	Claudia Caceres-Camilla
jeffbirklive.com	Jeff Birk	PricewaterhouseCoopers LLP	Beth Hopkins
JHI	Kristen Deo	PricewaterhouseCoopers LLP	Tammy Maddox
Jonathan Halls & Associates	Jonathan Halls	PCAOB	Matthew Murray
J.P. Morgan Asset Management	Chardinay Wood	PCAOB	Michelle Bogovich
JPMorgan Chase	Rashaun Booker	PCAOB	Melissa Haas
Kansas Society of CPAs	Danielle Bulson	Putnam Retail Management	Omer Ipekci
KPMG LLP	Augustina Okeke	Raffa, P.C.	Brandi Brown
KPMG LLP	Jaime Santora	Robert Half International	Tiffany Kelly
KPMG LLP	Andrea Schwartz	Sandra L. Leyva, Inc.	Tracy Fine
Learning.net	Terry Heiney	SmartPros Ltd	Sandi Leyva
Learning.net	Alaine Jarin		Jack Fingerhut
Learning.net	Stacey Kim		
LearnLive Technologies	Julie DeRitis		
Lenovo Internal Audit	Monique White		



Attendees by Organization

Southern Assoc. of College &
University Business Officers

Spidell Publishing, Inc.
Spidell Publishing, Inc.

Surgent McCoy CPE, LLC
Surgent McCoy CPE, LLC

Tax Analysts

Texas State Board of Public Accountancy

The Center for Professional Education, Inc.

The Center for Professional Education, Inc

The Rainmaker Companies

Thomas T. Ueno, CPA

Thomson Reuters Governance,
Risk and Compliance

Tom Ostlund Seminars

Treasury Inspector General for
Tax Administration

Treasury Inspector General for
Tax Administration

U.S. Securities & Exchange Commission

University of Colorado

USDA Office of Inspector General
Audit (USDA OIG Audit)

Vermont Board of Public Accountancy

Virginia Board of Accountancy

Virginia Society Of CPAs

Virginia Society Of CPAs

Walter C. Davenport, CPA

West Virginia Board of
Accountancy

Western CPE

Western CPE

Lynn Butler

Brenna Maas

Lisa Mackey

Janet Benjamin

Valerie Wendt

GulnarZaman

Roel Cantu

Patricia Berry

Kathleen Risko

Mary Ann Brawner

Thomas Ueno

Lisa Heringlake

Thomas Ostlund

Andrea Barnes

Michele Seeba

Daniel Peters

Lisa S. Vallad

Tiffany Conn

Joshua Partlow

Wade Jewell

Amy Mawyer

Linda Newsom-McCurdy

Walter C. Davenport

Stefani Young

Kassy Brough

Erin Murphy

Wisconsin Accounting Examining Board

Wolters Kluwer, CCH

Wolters Kluwer, CCH

Wyoming Board of Certified
Public Accountants

Effective 08/31/2015

Gerald Denor

Joseph Gornick

Gwen Hefty

Roxanne Ostlund



The Martin Luther King, Jr. Memorial. This solid granite monument was dedicated on August 28, 2011, the 48th anniversary of the March on Washington for Jobs and Freedom, one of the largest political rallies for human rights in United States history.

Attendees by Name

Aguirre, Terra
Alejandro, Vilma
Barnes, Andrea

Benjamin, Janet
Benson, Eric
Berry, Patricia

Birk, Jeff
Bogovich, Michelle
Bonk, Curtis
Booker, Rashaun
Brawner, Mary Ann
Brough, Kassy
Brown, Brandi
Bulson, Danielle
Butler, Lynn

Caceres-Camilla, Claudia
Campbell, Rebecca
Cantu, Roel

Castillo, Frank
Cole, Greg
Conn, Tiffany

Cure, Jeanne

Davenport, Walter
Davis, Amanda

Capin Crouse, LLP
Federal Reserve Bank of Richmond
Treasury Inspector General
for Tax Administration

Surgent McCoy CPE, LLC
Boomer Consulting Inc.
The Center for Professional
Education, Inc.

jeffbirklive.com
PCAOB
Indiana University
JPMorgan Chase
The Rainmaker Companies
Western CPE
Putnam Retail Management
Kansas Society of CPAs
Southern Assoc. of College
& University Business
Officers (SACUBO)
PricewaterhouseCoopers LLP
Colorado Society of CPAs
Texas State Board of Public
Accountancy

CPE Depot
BKD, LLP
USDA Office of Inspector
General Audit (USDA OIG Audit)

National Association of
College and University
Business Officers (NACUBO)

Walter Davenport, CPA
North Carolina Association of
Certified Public Accountants

Denor, Gerald

Deo, Kristen
DeRitis, Julie
Dingler, Eric
Eagen, Jim
Eggers, Heather
Evans, Debbie
Fay, Robert
Fine, Tracy
Fingerhut, Jack
Fitzpatrick, Bo
Frederick, Amy
Gaston, Sue
Gavin, Tom
Godfrey, Ruth
Gornick, Joseph
Gottfried, James
Gowdy, Kaitlyn
Grant, Michael
Haas, Melissa
Halls, Jonathan
Hansen, Krystine

Hefty, Gwen
Heiney, Terry

Heringlake, Lisa

Hessling, Cindy
Holl, Sue
Hopkins, Beth
Howie, Deborah
Hubbard, Barbara
Hubbard, Brenda
Hunter, Margaret
Hunter, Thyra

Wisconsin Accounting
Examining Board
JHI
LearnLive Technologies
Deloitte LLP
Institute of Internal Auditors, Inc.(IIA)
Baker Tilly Virchow Krause, LLP
Capin Crouse, LLP
Accountancy Board of Ohio
Robert Half International
SmartPros Ltd
20-20 Services LLC
Grant Thornton, LLP
IRS Return Preparer Office
Abacus-AT-e2, L.L.C.
California Tax Education Council
Wolters Kluwer, CCH
Accountancy Board of Ohio
DirectorCorps, Inc.
AICPA
PCAOB
Jonathan Halls & Associates
Healthcare Financial
Management Associations
Wolters Kluwer, CCH
Learning.net, Division of The Learning
Network, Inc.
Thomson Reuters Governance, Risk and
Compliance
Crowe Horwath LLP
CAMICO Mutual Insurance Co.
PricewaterhouseCoopers LLP
Graduate School USA
General Motors Company
Florida Institute of CPAs
General Motors Company
Blackline, Inc



Attendees by Name

Ilyasu, Murtala Isah
Ipekci, Omer
Jarin, Alaine
Jewell, Wade
Kelly, Tiffany
Kim, Stacey
Kinney, Liz
Kletscher, Lynn
Knipe, Angie

Labbie, JoAnn
Lavery, Lisa
Leaman, Carol
Lehmann, John

Leibson, Diane
Leon, Martha
Leyva, Sandi
Ling, Bridget
Liu, Will

Maas, Brenna
Mackey, Lisa
Madawaki, Kabiru
Maddox, Tammy
Mansfield, Felicia
Mawyer, Amy
McKeever, Jason
McManus, Karen
Migliacci, Gerri
Miller, Faye
Miller, Tie
Morgan, Lori

PCAOB
Learning.net
Virginia Board of Accountancy
Raffa, P.C.
Learning.net
IRS
Minnesota Society of CPAs
Council of Petroleum Accountant
Societies, Inc. (COPAS)
Associated Regional Accounting Firms
Cisco Systems, Inc
Axonify
National Restaurant Association
Executive Study Group
CBIZ, Inc.
American Management Association
Sandra L. Leyva, Inc.
Arthur Bell, CPAs
Global Association of Risk
Professionals (GARP)
Spidell Publishing, Inc.
Spidell Publishing, Inc.
PricewaterhouseCoopers LLP
Health Care Service Corporation
Virginia Society Of CPAs
Eide Bailly LLP
Cherry Bekaert LLP
EisnerAmper LLP
North Dakota State Board of Accountancy
AICPA
Andersen Tax LLC

Morse, Evelyn
Murphy, Erin
Murray, Matthew
Newsom-McCurdy, Linda
Okeke, Augustina
Oleksa, Jennifer
Ostlund, Thomas
Ostlund, Roxanne

Ottiger, Andrew D.
Parente, James
Partlow, Joshua
Peters, Daniel
Prager, Jenna
Ramsay, Gennifer
Raspante, John

Rigsbey, Jeremy
Risko, Kathleen
Rosso, Clar

Roy, Melinda
Santora, Jaime
Santos, Michele
Schnurman, David
Schock, Dave
Schwartz, Andrea
Seeba, Michele

Sehgal, Rita
Seredni, Christine
Sherman, Julee
Simpson, Russell
Skorupa, Lindsay

Slusser, Janice
Smith, D. Lynn

BDO USA, LLP
Western CPE
PricewaterhouseCoopers LLP
Virginia Society Of CPAs
KPMG LLP
Georgia Society of CPAs
Tom Ostlund Seminars
Wyoming Board of Certified Public
Accountants
Practising Law Institute
Business Professionals Network
Vermont Board of Public Accountancy
U.S. Securities & Exchange Commission
EisnerAmper LLP
BKD, LLP
North American Professional Liability
Insurance Agency, LLC
Global CPE
The Center for Professional Education, Inc.
American Institute of Certified Public
Accountants (AICPA)
Moss Adams LLP
KPMG LLP
Guam Board of Accountancy
Furthered.com
Netsuite, Inc.
KPMG LLP
Treasury Inspector General for Tax
Administration
Ernst & Young LLP
Cherry Bekaert LLP
Central Methodist University
BOOKE
Capital One Financial Services, Corporate
Audit and Security Services
CalCPA
D. Lynn Smith



Attendees by Name

Snider, Daniel
Spencer, Elizabeth
Steinbauer, Brian
Steinwedel, Alverta

Sullivan, De'Landa
Taylor, Anne
Tessema, Dereje
Tharp, Donald

Thiemann, Sue
Thompson, Kevin

Tiggett, Sherry
Tross, Nina
Turner, Danielle
Ueno, Thomas
Uhl, Ashley
Vallad, Lisa S.
Vazquez, Yasmin
Vieira, Melinda
Wahlen, Maurine
Warner, Debbie
Waters, Jared
Wendt, Valerie
White, Kristin
White, Monique
Wierman, Tom

Willis, Martha
Wood, Chardinay
Wright, Salena
Young, Stefani

CPEasy
CliftonLarsonAllen LLP
Crowe Horwath
Maryland Society of Accounting and Tax
Professionals, Inc
Maryland Association of CPAs
Business Professionals Network

Council of Petroleum Accountant Societies,
Inc. (COPAS)

Boomer Consulting Inc.
Federal Housing Finance Agency Office of
Inspector General

Multistate Tax Commission
National Society of Tax Professionals
Plante & Moran, LLC
Thomas T. Ueno, CPA
M&A Source
University of Colorado
Association of Certified Fraud Examiners
APlusCPE®, a service of WebCE®

General Conference Auditing Service
Institute of Management Accountants
Business Valuation Resources, LLC

CPEasy
Cisco Systems, Inc
Lenovo Internal Audit
Council of Petroleum Accountant Societies,
Inc. (COPAS)

Gleim Publications, Inc.
J.P. Morgan Asset Management
AICPA
West Virginia Board of Accountancy

Youngers, Lynda
Zaman, Phil
Zaman, Gulnar
Zieman, Ricki
Zink, Alison

Zizwarek, Debbie

Effective 08/31/2015

CPE Committee
Denor, Jerry
Fay, Robert
Gottfried, James
Miller, Faye
Partlow, Josh
Smith, Lynn
Ueno, Tom

NASBA Staff
Alexander, Alfonzo
Caldwell, Maria
Gray, Cassandra
Holt, Gene
Kenny, Thomas
Klein, Miki
Layton, Angela
Luttrull, Jessica
McGregor, Amanda
Owsley, Jr., Johnny
Price, Jeff
Thompson, Jill
Turner, Kathryn
Williams, Terri
Woodlee, Cynthia

CORPTAX LLC
CBIZ, Inc.
Tax Analysts
APlusCPE®, a service of WebCE®
Federal Housing Finance Agency - Examiner
Development Branch
Maryland Association of CPAs

Wisconsin Accounting Examining Board
Accountancy Board of Ohio
Accountancy Board of Ohio
North Dakota State Board of Accountancy
Vermont Board of Public Accountancy
D. Lynn Smith
Thomas T. Ueno, CPA

NASBA Ctr for the Public Trust
NASBA Compliance Services
NASBA Communications
NASBA Communications
NASBA Communications
NASBA Compliance Services
NASBA Communications
NASBA Compliance Services
NASBA Compliance Services
NASBA Compliance Services
NASBA Compliance Services
NASBA Compliance Services
NASBA Compliance Services
NASBA Compliance Services
NASBA Compliance Services
NASBA Compliance Services
NASBA Compliance Services



The Newseum, located on historic Pennsylvania Avenue, is comprised of state-of-the-art theaters, exhibits and hands-on activities dedicated to preserving the five freedoms of the First Amendment. Educators and students from around the globe access the Digital Classroom, a free resource containing primary resources, interactives, videos and lesson plans.

GRESS SHALL MAKE NO LAW
ECTING AN ESTABLISHMENT
ELIGION, OR PROHIBITING
FREE EXERCISE THEREOF;
BRIDGING THE FREEDOM
PEECH, OR OF THE PRESS;
HE RIGHT OF THE PEOPLE
EABLY TO ASSEMBLE, AND
ETITION THE GOVERNMENT
A REDRESS OF GRIEVANCES
AMENDMENT TO THE CONSTITUTION OF THE UNITED STATES



NEWSEUM

Guest Speakers

Dr. Curtis J. Bonk is Professor at Indiana University teaching psychology and technology courses and President of CourseShare. Drawing on his background as a corporate controller, CPA, educational psychologist, and instructional technologist, Bonk offers unique insights into the intersection of business, education, psychology, and technology.

A well-known authority on emerging technologies for learning, Curt has given over 1,400 talks around the globe and has over 300 publications on topics such as online and blended learning, massive open online courses (MOOCs), massive multiplayer online gaming, wikibooks, blogging, open source software, collaborative technologies, and synchronous and asynchronous computer conferencing. Curt taught a MOOC on online teaching in the spring of 2012 to nearly 4,000 people that was hosted by Blackboard in CourseSites. Curt Bonk is author of the *Handbook of Blended Learning: Global Perspectives, Local Designs* (2006) as well as *Empowering Online Learning: 100+ Activities for Reading, Reflecting, Displaying, and Doing* (2008), and *The World Is Open: How Web Technology Is Revolutionizing Education* (2009). And his latest book with Routledge, *MOOCs and Open Education Around the World*, as well as a special issue of the *International Journal on E-Learning* on the same topic both came out in July 2015.



See Bonk's homepage for his archived talks and Web resources at: <http://php.indiana.edu/~cjbonk/>. Curt can be contacted at: cjbonk@indiana.edu.



Click here to download Curt's free ebook *Adding Som TEC-Variety: 100+ Activities for Motivating and Retaining Learners Online* (2014).



Guest Speakers

Jonathan Halls is Founder and Principal of Jonathan Halls & Associates which is based in Alexandria, Virginia. His firm trains people in leadership and media. He was managing Director of Talkshow Communication Ltd in London and formerly held a senior role at the BBC.

Jonathan is also an Adjunct Professor at the Graduate School of Political management at George Washington University in Washington, DC. Jonathan has taught media, communication and leadership for two decades. He has spoken at many exciting places including the Institute of Finance in Moscow (Russia), Nottingham University (UK), University of New South Wales (Australia) and Georgetown University (US).

He has also trained people from many diverse organizations including OfficeMax, Microsoft, Chevron, Comcast, AIG, BBC, Daily Telegraph, DeVolkskrant, Disney, ITV, Channel Four and more.



Guest Speakers

Jeff Birk pretty much knew his destiny when his 5th-grade classmates all voted him the funniest guy in the school. Later while in college, Johnny B's Comedy Club in Provo, Utah became a frequent hangout for him after he decided to give "open mic night" a try in 1990. He was an instant hit. The club brought him back to open for touring comics. Soon, he was the headliner.

He has opened for Jay Leno, Bill Cosby, Martin Short, Kevin James and Wanda Sykes among others and was featured on America's Funniest Home Videos. He won the National Lampoon Collegiate Comedy Pop-Off in 1991 and spent time working with the William Morris Agency in Los Angeles. Jeff's acting talents have given him the opportunity to be in a few movies (starring in "The Home Teachers") and his wide variety of voices have been used in narration, radio and corporate advertising.

Jeff has balanced all the the above with 25-plus years working as a keynote speaker and trainer for companies such as Bose, Pier 1 Imports, Bayer, Honda, Virgin Trains, Hugo Boss, Golden Nugget Casinos, Choice Hotels International and GE Healthcare.



Guest Speakers

Eric Dingler is a Talent Development professional with 25 years of experience leading organizations through complex, large-scale changes. Eric joined Deloitte in 2008 and after five years, became Director and Chief Learning Officer for Deloitte & Touche Audit. He focuses on driving accelerated development for client service professionals through orchestrating an individual's experiences, exposure and education against their expectations. While at Deloitte, he has led the implementation of a talent development strategy, development of marquee programs, a differentiated comprehensive learning curriculum and leaps forward in the technology and accessibility supporting the learner experience. This transformation included the implementation of Deloitte University, The Leadership Center, a physical university with a focus on leadership development.

Eric's areas of specialization include such topics as adult learning theory, organizational & human dynamics, change-management, systems thinking, and coaching. His work places an emphasis on accelerating and sustaining shifts in mindsets and actions through a total ecosystem approach to building individual capabilities on a scale basis.

Eric is a CPA. He has a Bachelor's degree in Business Administration – Accounting and Finance from the University of Pacific in Stockton, California and an MBA from the University of California at Los Angeles.



Guest Speakers

Carol Leaman is President and CEO of Axonify. Using the latest principles of gamification and brain science, Axonify is the world's first eLearning platform that delivers learning in a fun, bite-sized and personalized way. Carol is responsible for driving the overall strategic direction and Axonify's commitment to revolutionizing employee awareness and corporate learning. Carol brings more than 20 years of leadership and technology executive experience to the company as she has a history of building start-ups into multi-million dollar successes.

Most recently, Carol sold PostRank to Google after growing the company from a cool, free web tool, to a unique, customer-centric social media play in 2011. Prior to PostRank, she helmed RSS Solutions (enterprise class manufacturing software), and Fakespace (a high-end virtual reality company). She took Fakespace from \$3 million to \$30 million in revenue before orchestrating its acquisition in 2003, and sold RSS Solutions in 2006.

Carol brings her experience and insight to numerous boards, is a much sought after keynote speaker and has won multiple awards, including the Waterloo Region Entrepreneur Hall of Fame Intrepid Award (2011).



Guest Speakers

Matthew Murray is the Digital Learning Leader for US Learning & Development at PwC. Matthew has extensive experience researching and designing technology-based solutions and systems to improve productivity and business value in enterprise organizations. He has created digital simulations, mobile apps and social learning platforms. Based in Chicago, Matthew has a PhD in Communication Arts from the University of Wisconsin-Madison.



Guest Speakers

Jason McKeever - As Eide Bailly's director of training and development, Jason's goal is to find innovative, creative ways to grow the competency of the Firm. With this objective, he has developed a blend of traditional and cutting-edge training initiatives and programs for the classroom, online and self study settings. He has also implemented training webcasts as a primary means of connecting staff members across the Firm.

Jason is a natural teacher and presenter. His contagious, high-energy style captivates people's interests, even for programs some might consider mundane. As a certified Dale Carnegie course instructor and Situational Leadership facilitator, he successfully connects with audiences of all levels to provide educational and engaging programs, including generational awareness, sexual harassment awareness, team building, project management, successful presentation skills, business etiquette, presentation techniques and change management.



As a veritable master of home renovation projects, Jason could teach Bob Vila a few tips and tricks, if given the chance! Aside from remodeling his home, he enjoys exercising.





The Vietnam Veterans Memorial Wall. Built without government funds, this once controversial monument containing all the names of those missing or killed in the Vietnam War has become one of the most popular memorials in Washington, D.C.

JONATHAN HALLS



ENGAGING LEARNING VIDEO

Learning video is all the rage. It gives learners what they need to learn when they want it, where they want it & on whatever device they want it on. But not all learning video is created equal. Here are some tips to make your content stand out so it's quick & easy to understand & remember.

WRITING VIDEO SCRIPTS THAT ARE EASY TO UNDERSTAND

Remember, people watch video rather than listen to it. So rely on the pictures first to get your message across. Words should back up the pictures.

- ▶ Choose short words that are immediately familiar to your audience. Monosyllables are great because they're quick and easy for the brain to process.
- ▶ Write short sentences – one clause only. Avoid dependent clauses and favor verbs over nouns
- ▶ Check how your phrases sound. "Dropping **in humanitarian aid**," can sound like "Dropping **inhumanitarian aid**," when read out loud



FIRST QUESTIONS

- ▶ Is video the best modality for this learning content?
- ▶ Does the content have engaging pictures?
- ▶ Is your ONE learning objective clear?



GETTING GREAT SHOTS WITH AIM & SHOOT CAMCORDERS

If your budget only allows for a point & shoot camera with auto settings, here's how to get great shots.

- ▶ Place camera on stable surface – a tripod is best
- ▶ Ensure lots of light is shining on your object or subject
- ▶ Shoot on wide – never use the digital zoom
- ▶ Move physically closer to the person or object for better sound



EDITING

- ▶ Are you changing shots regularly to keep eyeballs?
- ▶ Are you resisting the temptation to throw in too many special effects?
- ▶ Do the pictures flow easily?



GETTING GREAT SHOTS WITH MANUAL CAMCORDERS

Professionals rely on manual function to get great shots. Here's what you need to do.

- ▶ Height – set your camera on a tripod
- ▶ White – set your white balance every time you shoot in a new location
- ▶ Light – make sure there's plenty of light and set you exposure
- ▶ Tight – zoom in tight and focus your shot
- ▶ Bright – Use an external microphone and manually set your levels so the sound is clear and bright



TALKING HEAD SHOTS

Talking head videos can't be made visually more interesting. But they can be made less boring:

- ▶ Change shot size regularly
- ▶ Drop in slides regularly



Presentations

JESSICA LUTTRULL

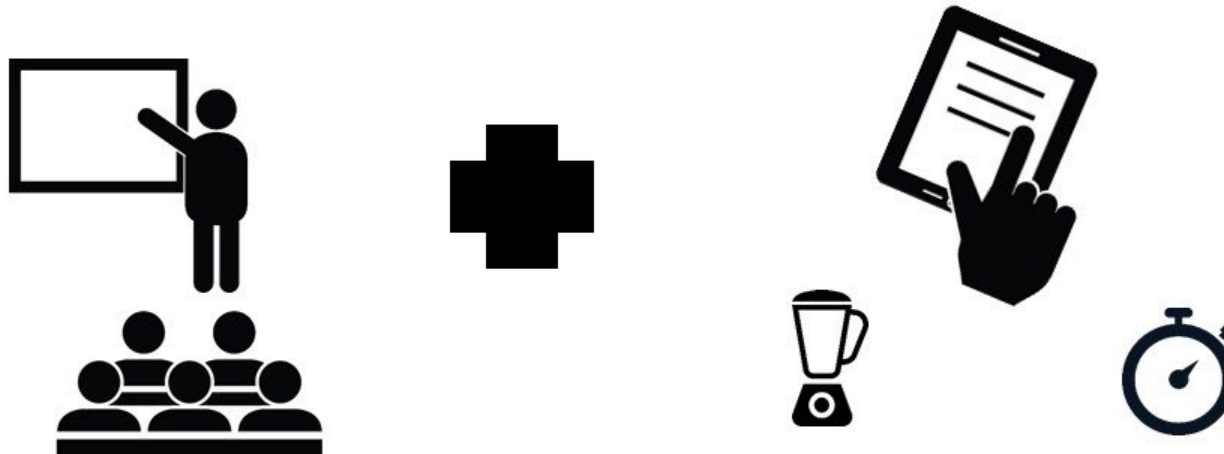


Statement on Standards for CPE Programs: Status Update



Changes to CPE Standards

- Approach to change has been additive
 - Keep the current, traditional instructional delivery methods
 - New delivery methods allow for learning that is more personalized and on demand (just in time)



Changes...

- Revised Definitions of Group Live and Group Internet Based
- Documentation requirements of developers and reviewers in a technical subject area (CPAs, attorneys and enrolled agents)
- Responsibilities for content purchased from another entity



Changes...

- Interactivity in Group Live programs
- Nano-Learning
- Blended Learning
- Assessments in Self Study





Status

- **Exposure Draft posted *May 19, 2015***
 - *Exposure Draft*
 - *Red-lined version of changes to the 2012 CPE Standards*
 - *Executive Summary of Changes*

Comments To Date (through 8/31/2015)

- Nano-learning



Comments To Date (through 8/31/2015)



- Concern on the complications of including one-fifth increment to CPE credit for nano-learning and group learning after first credit earned
- Plus, concern on the volume of certificates of completion

Comments To Date (through 8/31/2015)

- Requirement to solicit program evaluations from instructors
- CPE credit for technical reviewers – does their review really enhance or maintain technical competence



Comments To Date (through 8/31/2015)



- More clarity needed around blended learning requirements
- Proposed changes are loosening the Standards too much



NASBA

Process

- All submitted comments will be vetted first by the CPE Standards Working Group
- Recommendation will be sent to NASBA's CPE Committee for consideration
- Recommendation then moves to the Joint AICPA/NASBA CPE Standards Committee
- Final recommendation will seek approval from both AICPA and NASBA Boards of Directors



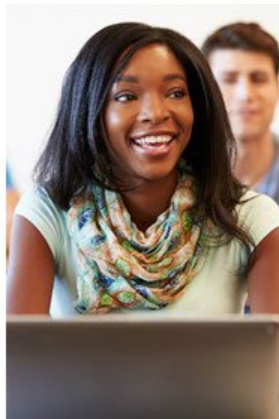
Timing

- Given significance of areas of comment, re-exposure of changes to the CPE Standards anticipated
- Seek approval for re-exposure from both AICPA and NASBA Boards of Directors at January 2016 meetings
- Public comment period through April 30, 2016
- Seek final approval from both AICPA and NASBA Boards of Directors at July 2016 meetings
- Effective date: September 1, 2016



Public comment period through *October 1, 2015*

- Comments to be submitted to Jessica Luttrull at jluttrull@nasba.org or Clar Rosso at crosso@aicpa.org





Presentations

JEFF BIRK





Train like a Rockstar

Speaking Tips from a Stand-Up Comedian

Presented by: Jeff Birk

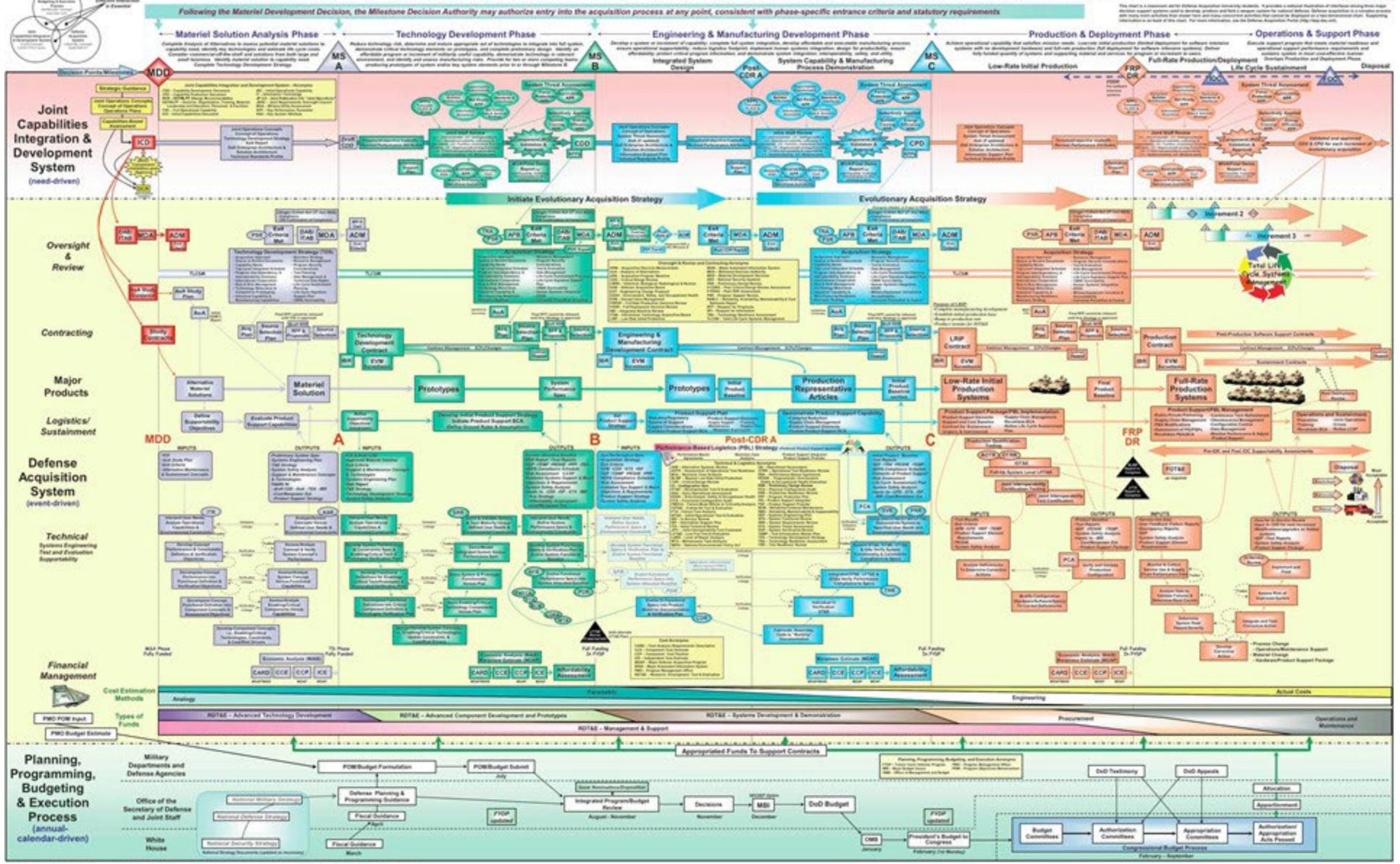


@jtbirk



jeff.t.birk@gmail.com

Integrated Defense Acquisition, Technology, and Logistics Life Cycle Management System





wallpapersus.com



Train like a Rockstar

Speaking Tips from a Stand-Up Comedian

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@jtbirk

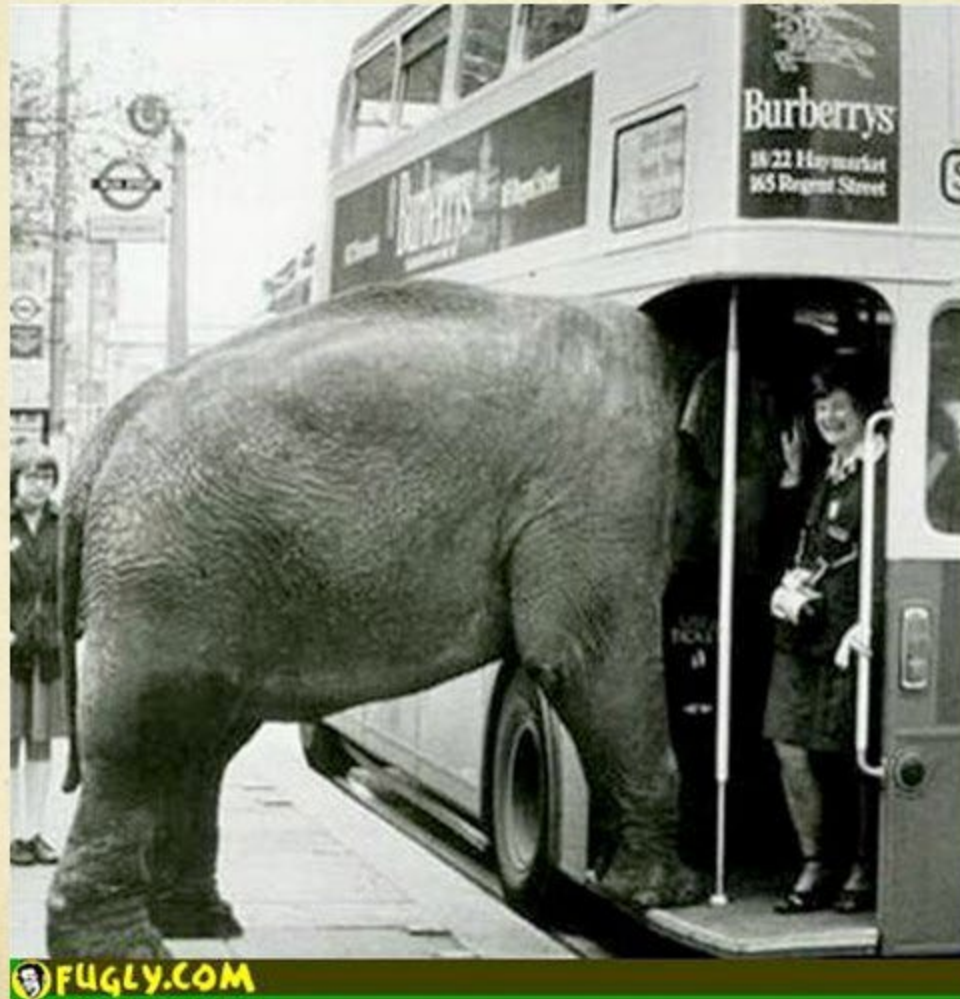


jeff.t.birk@gmail.com

1. Your First 3 Minutes



Give Them the Unexpected





Tell Stories



2. Non-attentive Attendees



2. Non-attentive Attendees



2. Non-attentive Attendees



strategy

great work

SUCCESS

appreciation

engagement



**What Will You Take
With You Today?**



Thank You!



Train like a Rockstar

Speaking Tips from a Stand-Up Comedian

Presented by: Jeff Birk



@jtbirk



jeff.t.birk@gmail.com

CAROL LEAMAN

Axonify

**Leveraging the Latest in Brain Science & Gamification to
Meet the Needs of the Modern Learner**

*Carol Leaman
CEO of Axonify*



The Focus of This Session

Axonify

- The Modern Learner
- 4 Ways Learning is Changing
- Real Corporate Examples
- Q&A

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MEET THE MODERN LEARNER

As training moves to more digital formats, it's colliding with new realities in learners' jobs, behaviors, habits, and preferences.

Today's employees are overwhelmed, distracted, and impatient. Flexibility in where where and how they learn is increasingly important. They want to learn from their peers and managers as much as from experts. And they're taking more control over their *own* development.

OVERWHELMED...

1% of a typical workweek is all that employees have to focus on training and development

5 Number of times online every day early days of the Internet

27 today

41 % of time workers spend on things that offer little personal satisfaction and do not help them get work done.

4 Most learners won't watch videos longer than 4 minutes

9 People unlock their smartphones up to 9 times every hour

2/3 Knowledge workers are constantly distracted with millions of websites, apps, and video clips.

IMPATIENT...

5 and 10 Online, designers hover hour between seconds to grab someone's attention before they click away

5 Workers now get interrupted as frequently as every 5 minutes—ironically, often by work applications and collaboration tools

of knowledge workers actually complain that they don't have time to do their jobs

UNTETHERED

Today's employees find themselves working from several locations and structuring their work in nontraditional ways to accommodate their lifestyles. Companies are finding it difficult to reach these people consistently and even harder to develop them efficiently.



ON-DEMAND

Employees are accessing information—and learning—differently than they did just a few years ago. Most are looking for answers outside of traditional training and development channels. For example:



COLLABORATIVE

Learners are also developing and accessing personal and professional networks to obtain information about their industries and professions.



EMPOWERED

Rapid change in business and organizations means everyone needs to constantly be learning. More and more people are looking for options on their own because they aren't getting what they need from their employers.



Bersin
by Deloitte

Sources:
"The New Workforce Paradigm: Shifting the Work Environment" Research University Press
"The Knowledge Worker's Day" Forrester
"Mobile: How Far the Work Force Will Go?" Second Edition, Forrester
"Collaborative & Social: How These Business Models, Cutting-Edge in Their Time, Are Changing" Forrester
"The Workforce of the Future" Deloitte
"Mobile: How Far the Work Force Will Go?" Forrester
"Industry: Social Interaction and Work of Work" IBM
"E Learning: Beyond Blended Learning" Forrester
"Research: Performance: How to Build a Strong Culture and How Work" University of Massachusetts
"The Mobile Workforce: Mobile Employees 2011" IBM
"Education is Not a Privilege" Forrester
"The Year of the Employee" Deloitte
"Engaging (Strategic) Learning" Forrester
"How to Win Information Through Mobile Learning" For Research
"How to Win the Next Big Thing" Forrester
"The Workforce of the Future" Deloitte

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The Modern Learner

1%

Of a typical workweek to focus on training & development.

Axonify

Overwhelmed

75%

of workers state that they are stressed at work.

Impatient

>70%

of Learners turn to search engines.

Distracted

57%

of interruptions at work result from either social-media tools or apps.

Untethered

67%

of all workers use mobile and wireless computing.



Source: Bersin Research Bulletin, Meet the Modern Learner, November 26, 2014



The Result

Axonify



Employees aren't remembering and applying what they need to know to do their jobs and **it is expensive.**



Introducing 4 ways learning is changing to better meet the needs of the modern learner.



Brain Science



Gamification



Personalization



Point-of-Need

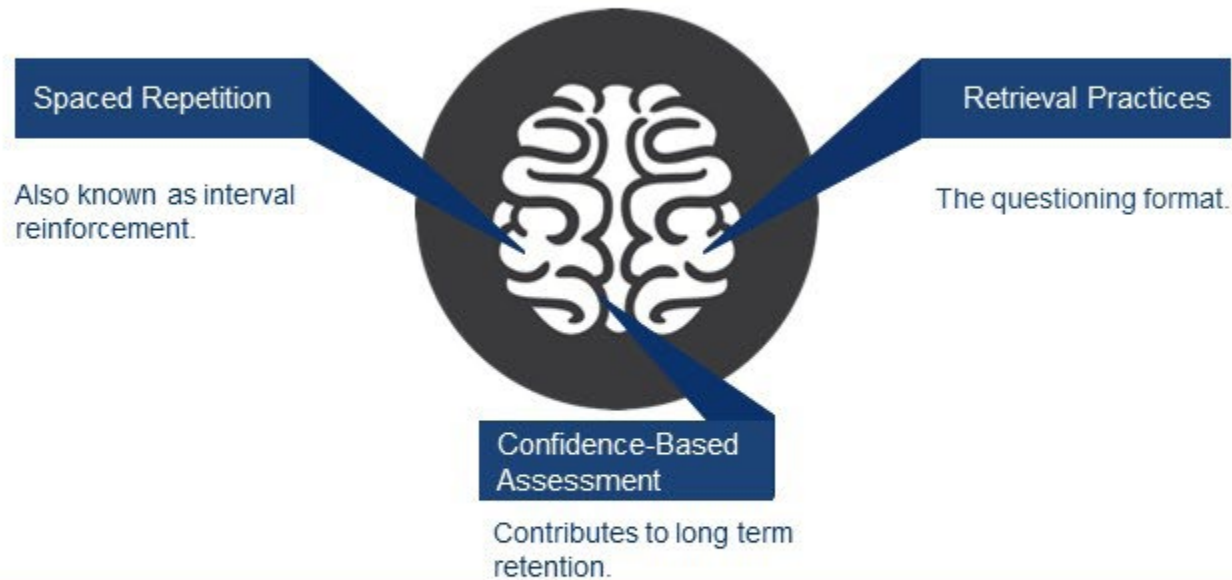


Leveraging How The Brain Really Works

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Three Core Concepts Driving Retention



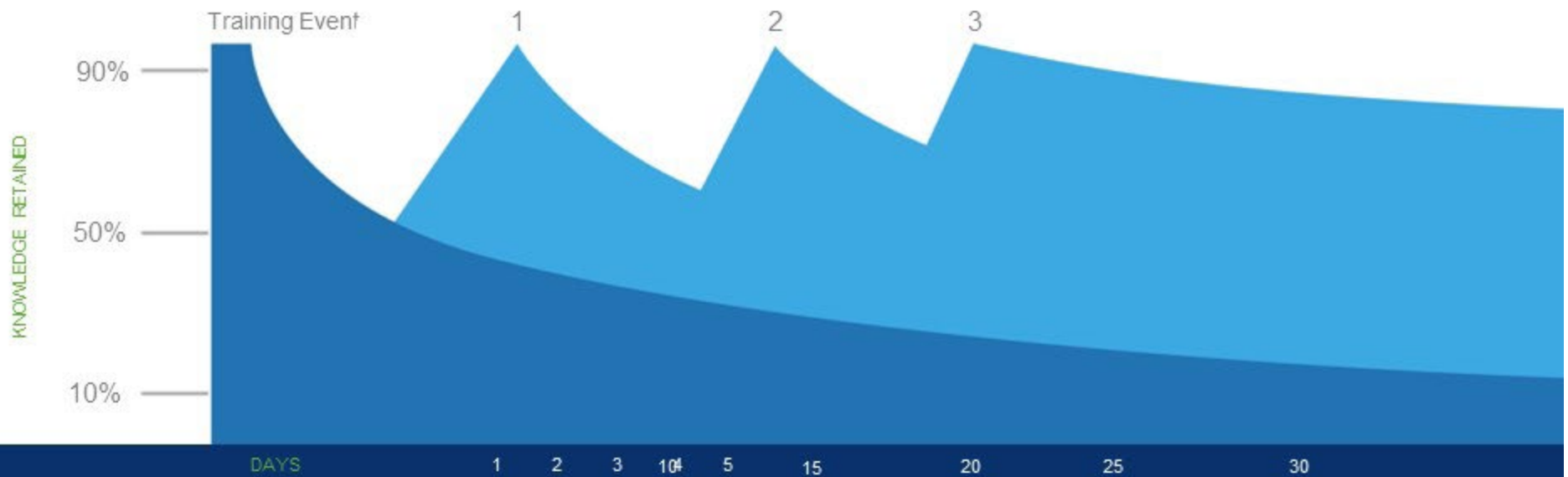
“When combined, spaced repetition and retrieval practices deliver the optimal environment for retention.”

Dr. Alice Kim, Rotman Research Institute at Baycrest

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Spaced Repetition



Exposing employees to ideas 3 times over 30 days, versus 1 time over 30 days.



Retention
Increases Up To
90%

3 Times After 30 Days



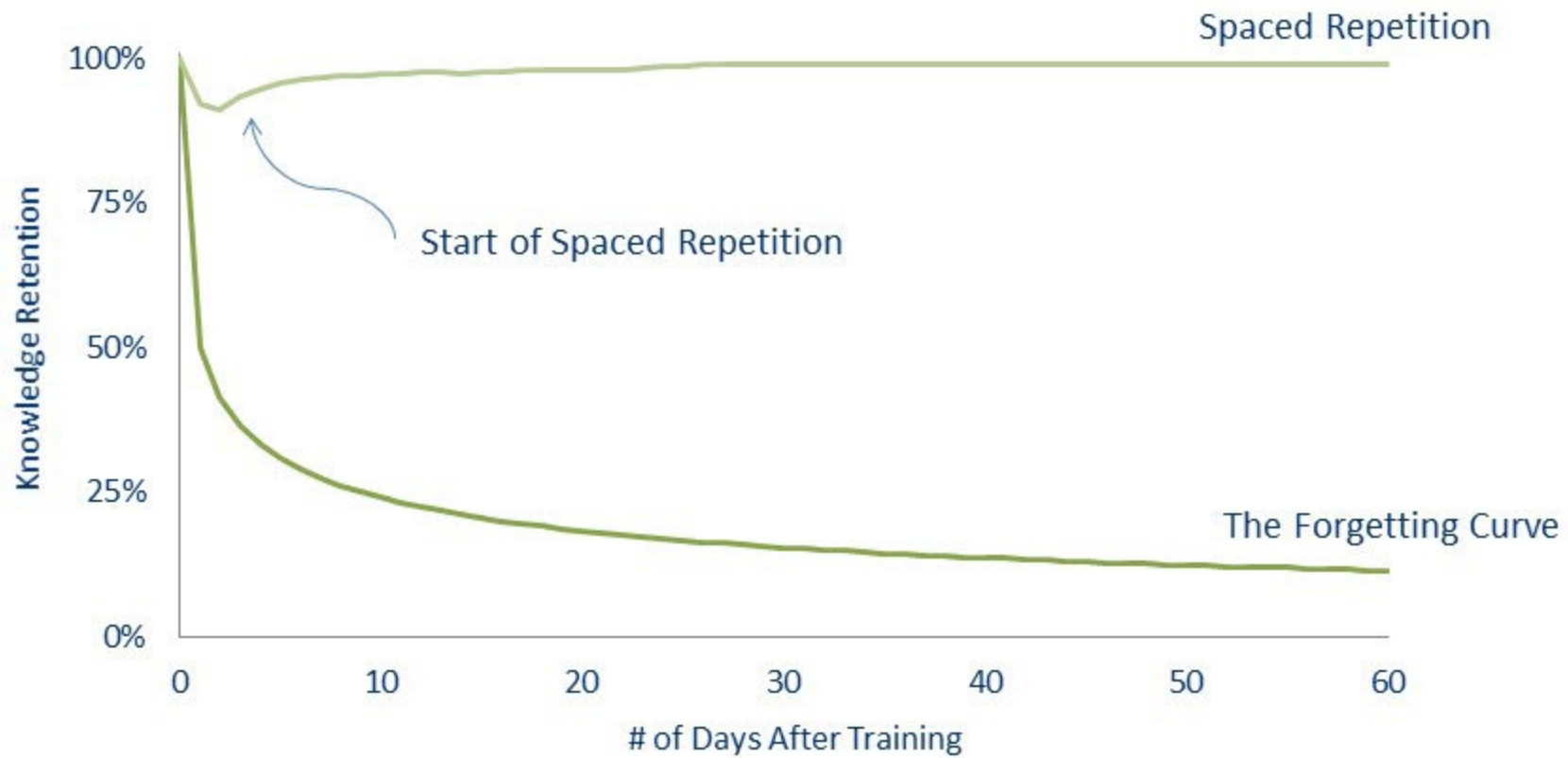
1 Time After 30



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Actual Knowledge Retention Graph

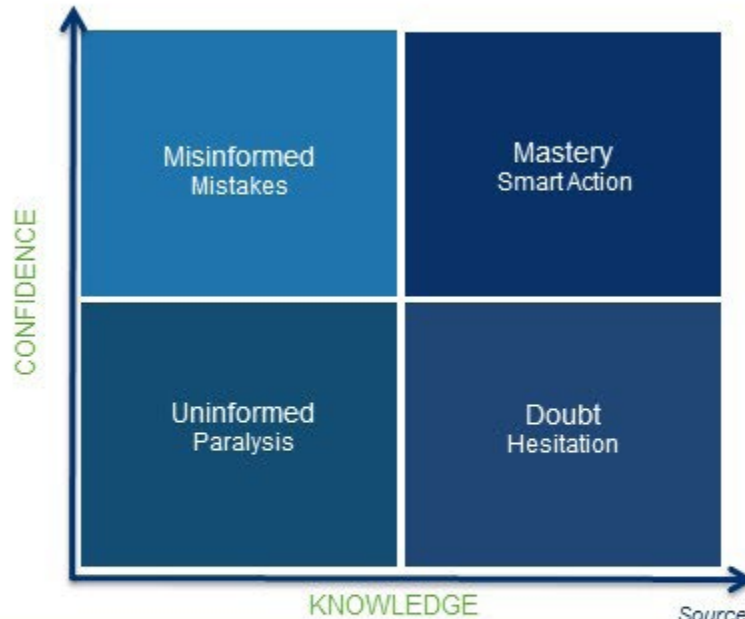


Based on 2.7M Sessions



Confidence-Based Assessment

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The use of a confidence-based learning methodology:

- Has shown better knowledge retention and knowledge acquisition.
- Triggers an emotional reaction, which assists with long-term retention.

Source: Dr. James Bruno Confidence-Based Learning Methodology, UCLA



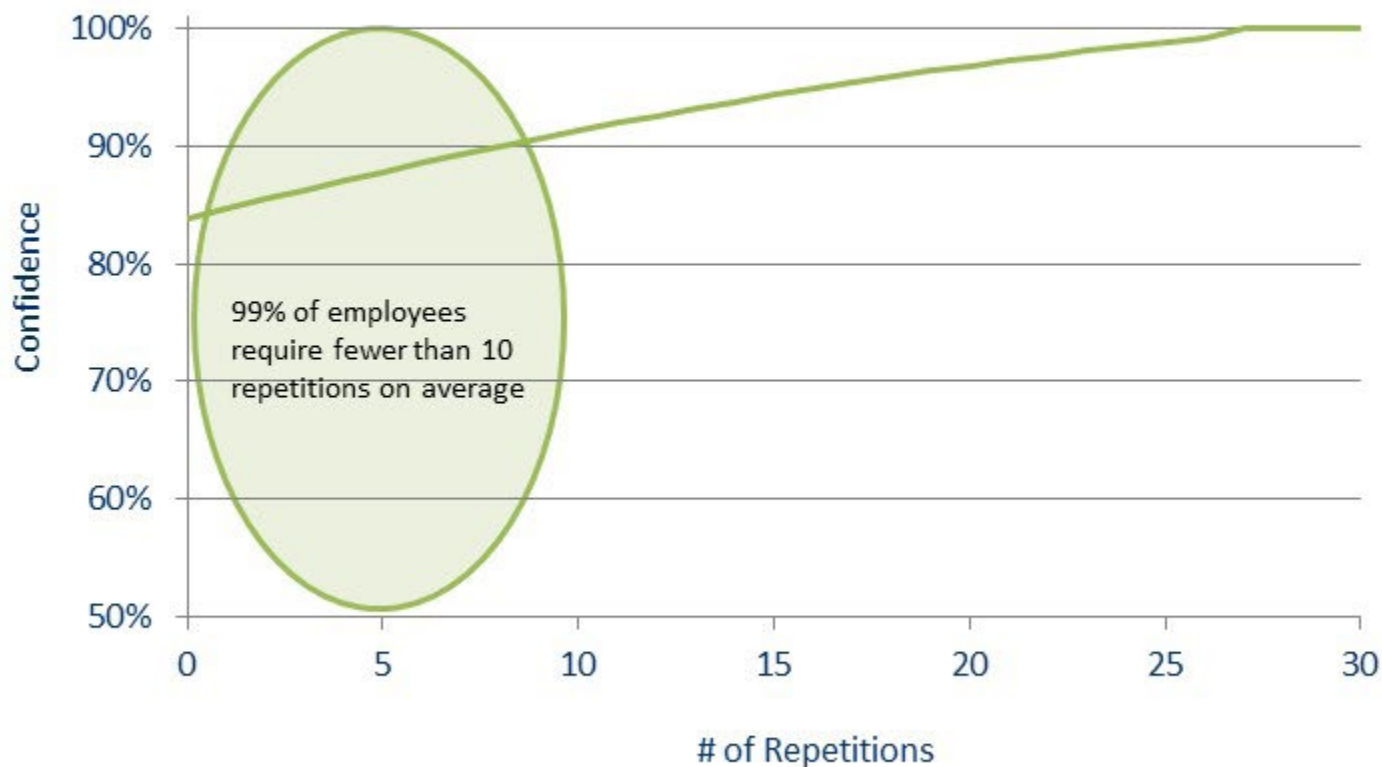
15-20%

More effective knowledge acquisition & retention

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Spaced Repetition Builds Confidence



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Gamification Drives Engagement

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What is this “game” stuff?

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A realistic, controlled-risk environment where learners can practice specific behaviors & experience impacts of their decisions.

Simulation Learning



The use of a game to teach knowledge, skills & abilities to learners using a self-contained space.

Game-based Learning



The use of gaming elements integrated into a training program aligned with corporate goals to promote change in behavior.

Gamification



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Axonify Game Mechanics

- Game Play
- Leaderboard – Personal & Team
- Rewards – Auction with Prizes
- Report Card
- Coaches (Avatars)
- Social Elements

Data based on:

250k+
learners

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Gamification Elements Dataset

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Game Play

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FACT #1

Science says "Game play improves the retention of learning"



FACT #2

Game play gives the time out learners need



FACT #3

Game play adds a "fun factor" and therefore employees participate more



FACT #4

Game play appeals to all generations, cultures and genders



Game Play

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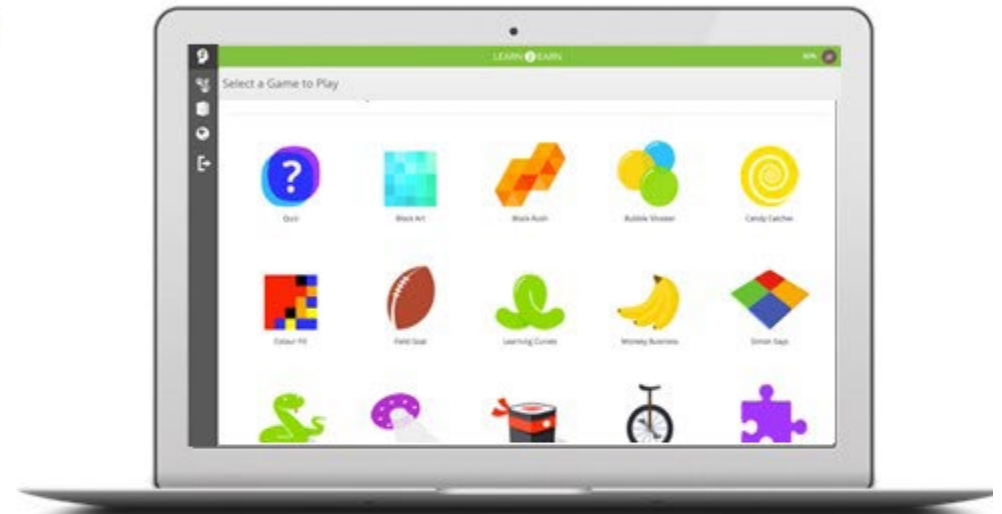


Game play leads to better learning.

Learners who select a game, participate

20%

more than those who don't.

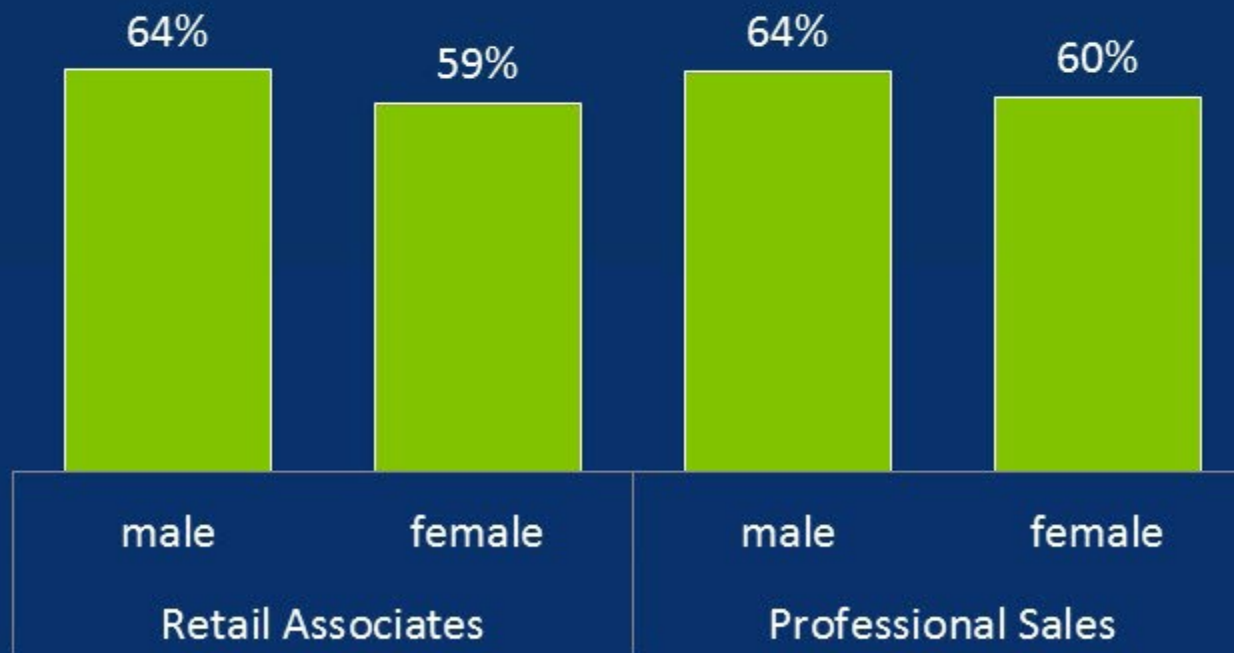


FACT: **72%** of Knowledge Workers choose game play.



Game Play Appeals to Everyone

Game Play Rate



Rewards

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Having tangible rewards help translate virtual success into real-world value.

40%

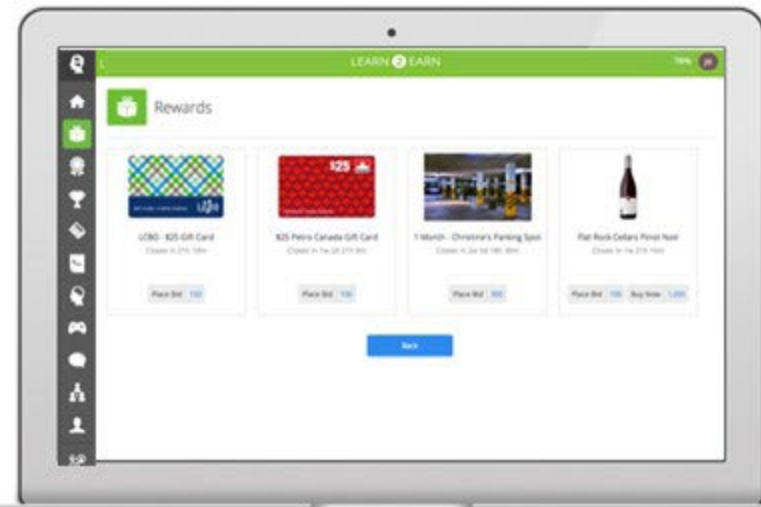
of Retail and M&D employees visit the rewards page daily

30%

Sales Reps

15%

Other Knowledge Workers



Voluntary participation is **over twice as high** when you provide tangible rewards (vs. intangible).

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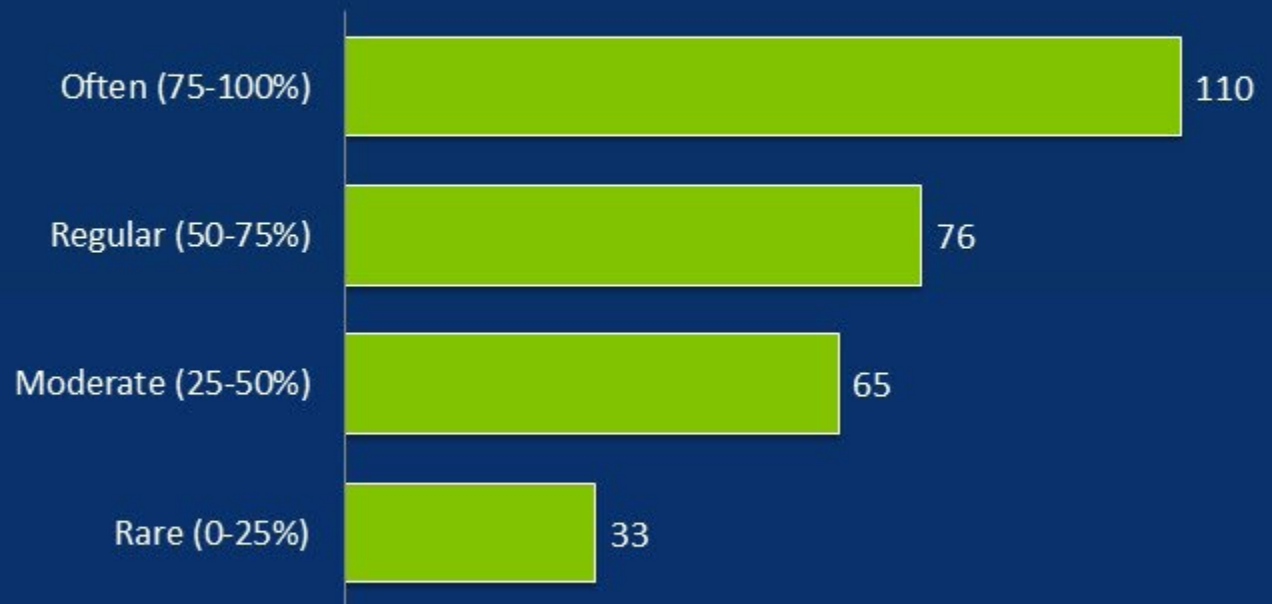
Rewards

Learners who visit the rewards page often participate over

3x

the rate than those that rarely visit.

Rewards Engagement Rate vs Session Frequency



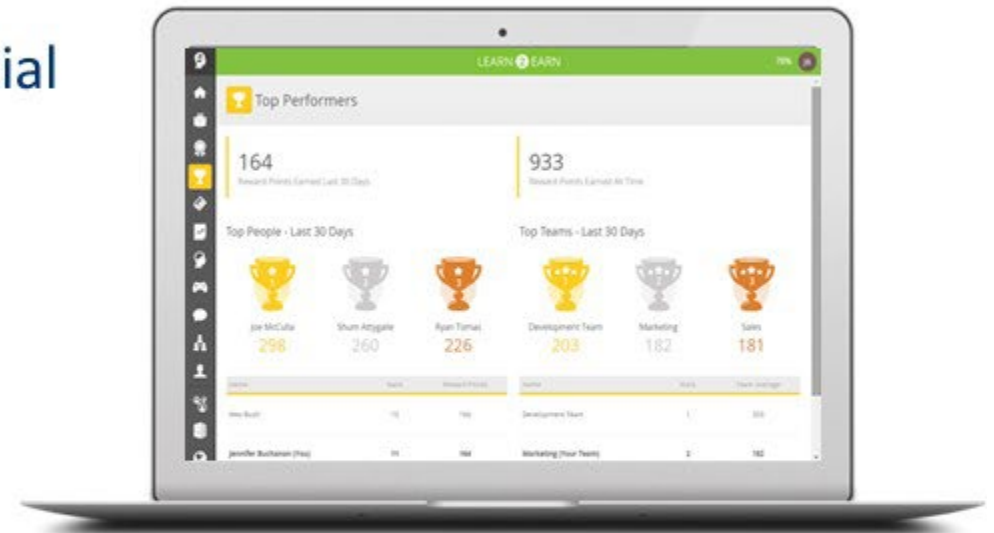
Leaderboards



A Leaderboard is an essential game mechanic.

40%

of learners check their leaderboard daily.



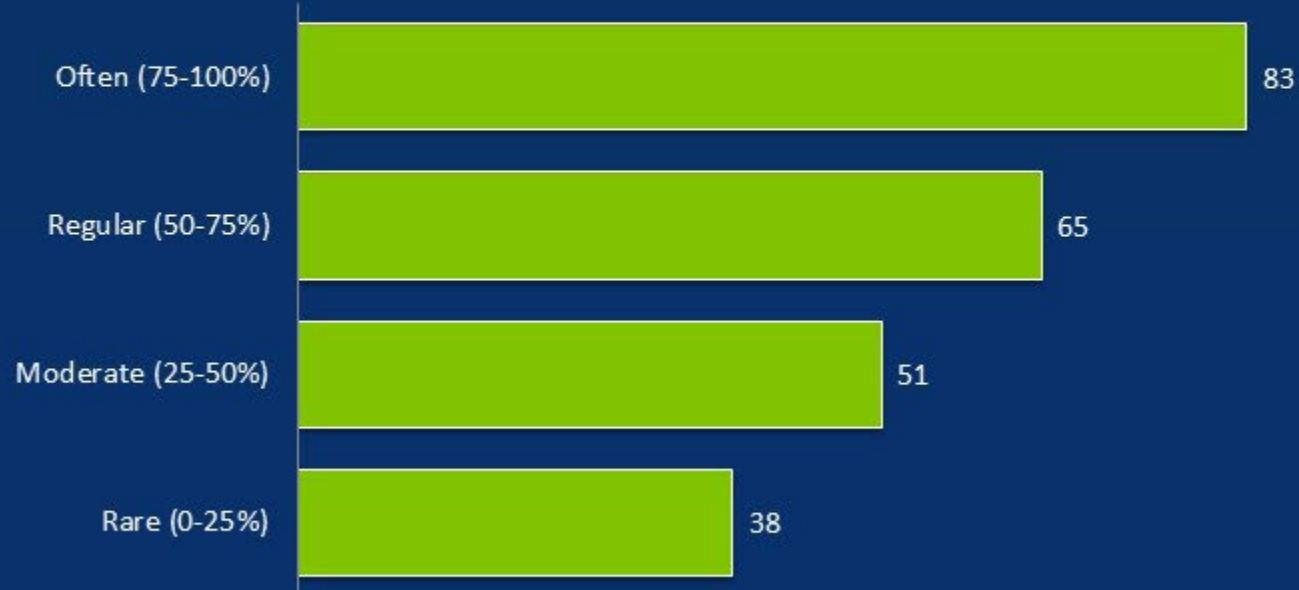
Team leaderboards drive competitiveness and social connectedness, creating a strong sense of community.

Leaderboard Views



Learners Who Visit the Leaderboard Often, Participate More

Leaderboard Engagement Rate vs Session Frequency



Coaches



A learning coach is an underrated game mechanic.

93%

of learners opt to select a a “Coach”

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In a gamified learning environment, learners respond better to the term “Coach”.



Learning Coaches



Male Employees



66%

Select a male coach

34%

Select a female coach

Female Employees



43%

Select a male coach

57%

Select a female coach

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Personal Performance

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Employees care about their progress.

16%

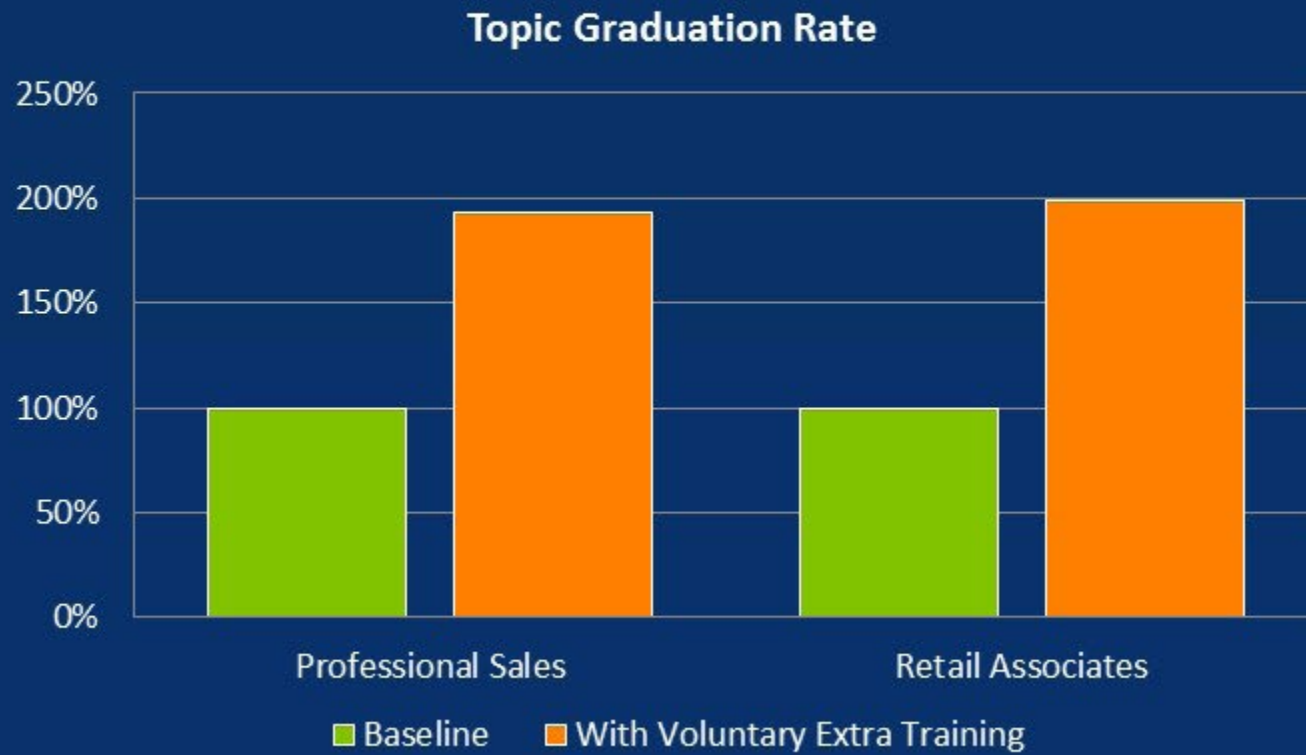
of the time, learners opt to take extra training.



It's important to provide learners with a clear view of how they're progressing, as well as the opportunity to grow their knowledge



Extra Training Doubles the Rate of Learning



It Takes a Combination of Game Mechanics to Drive Higher Participation in Learning



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A Personalized Approach that Adapts to the Learner

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Personalized Knowledge Map

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Personalized Knowledge Map





At the Point of Need



Learning at the Point of Need

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- Where they need it
- When they needed it
- How they'd like to access it

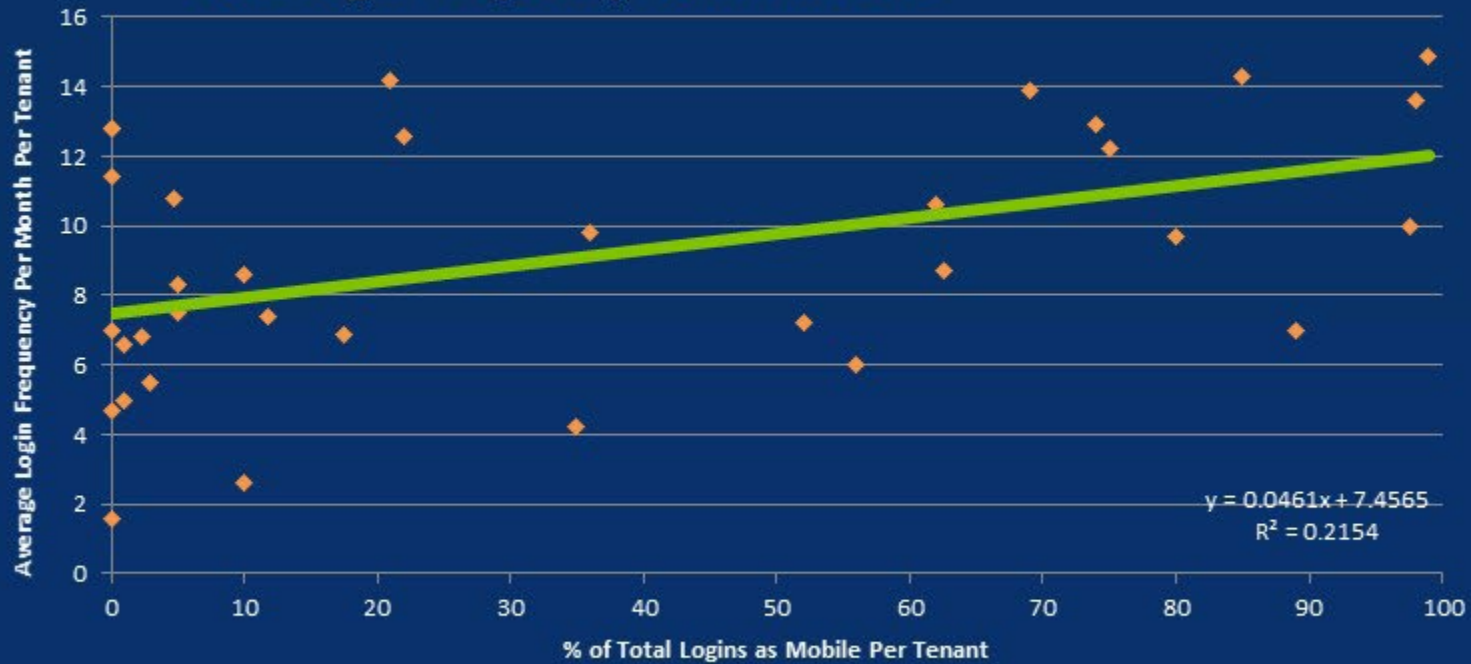


We are in a self-service culture. Workers expect to be able to look up the answer and dig deeper to learn more. Organizations must adapt.



Mobile = More Training

User Login Frequency Vs. Mobile Use



Companies that provide mobile access have 42% higher frequency.



Deloitte.



Deployment

19,000

Technology Consultants

7

Technology Practices



Objectives

- Increase tech fluency
- Obtain learning metrics
- Drive engagement
- Modernize learning practices
- Increase revenue and customer satisfaction levels

Axonify



Informed Employees

Deloitte IT Consultants have deep domain expertise within their chosen practices, however have limited knowledge in adjacent specialties, impacting customer satisfaction and revenue.

By combining the latest in brain science with gamification, Deloitte Consulting is reinventing how they deliver learning to their highly skilled IT consultants.

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GE Energy

Axonify



Application

600

IT Project Managers

Global

Implementation



Results

30%

Knowledge Lift In
Key Project Management
Topic Areas



Knowledgeable Employees

GE Energy's IT Project Managers around the globe reinforce their training with Axonify through their computers as well as mobile devices.

After an overwhelmingly successful launch, GE Energy is now rolling out Axonify to its employees in a number of languages world-wide.

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Application

120

Distribution Centers

70,000+

Employees Using Axonify



Results

54%

Safety Incident Reduction



Safer Employees

I know that Axonify has positively impacted our safety performance, it's a quick, simple way to keep safety top of mind.

- DC Manager

"Feedback about the Axonify platform has been phenomenal and we believe that it has been a significant contributing factor to our improved performance and engaged associate base."

Ken Woodlin, VP of Compliance, Safety & Asset Protection, Walmart Logistics

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Knowledge Lifts

40%

Knowledge Improvements



Business Impact

66%

Reduction In Errors



Happier Employees

"It's an easy system to use and a lot of fun. Last night I went home and looked through the materials so that I was prepared."

"We strive to provide the best overall customer experience in the industry, which means providing employees with the right knowledge at the right time, creating habits and culture. This is what Axonify does for us."

Scott Walter, Director of Operations, Capital BlueCross

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bloomingdale's

Axonify



Associate Feedback

85.6%

Stated that gamification increased their participation in learning

86.6%

Increase in confidence



Results

22.9%

Reduction in incidents

\$2.2 Million

Annual savings



Diverse Workforce

Bloomingdale's employees represent 4 different generations and many cultures & languages.

“At Bloomingdale’s we have fundamentally changed how we deliver Associate learning and the results have been outstanding. We have a smarter, safer, more engaged workforce.”

Chad McIntosh, VP of LP & Risk Management, Bloomingdale’s

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Sales & Service

14th → 5th

60-day stack-ranking improvement

13%

Exceeding sales targets



Cost Reduction

20%

Reduction in appeasement costs

50%

Reduction in absenteeism



Engaged Employees

"It's an easy system to use and a lot of fun. Last night I went home and looked through the materials so that I was prepared."

"We know people are enjoying the process of learning and are retaining more knowledge. This drives better quality of experience for our customers and for their customers"

Felix Serrano, SVP & General Manager, Sitel Work@Home Solutions

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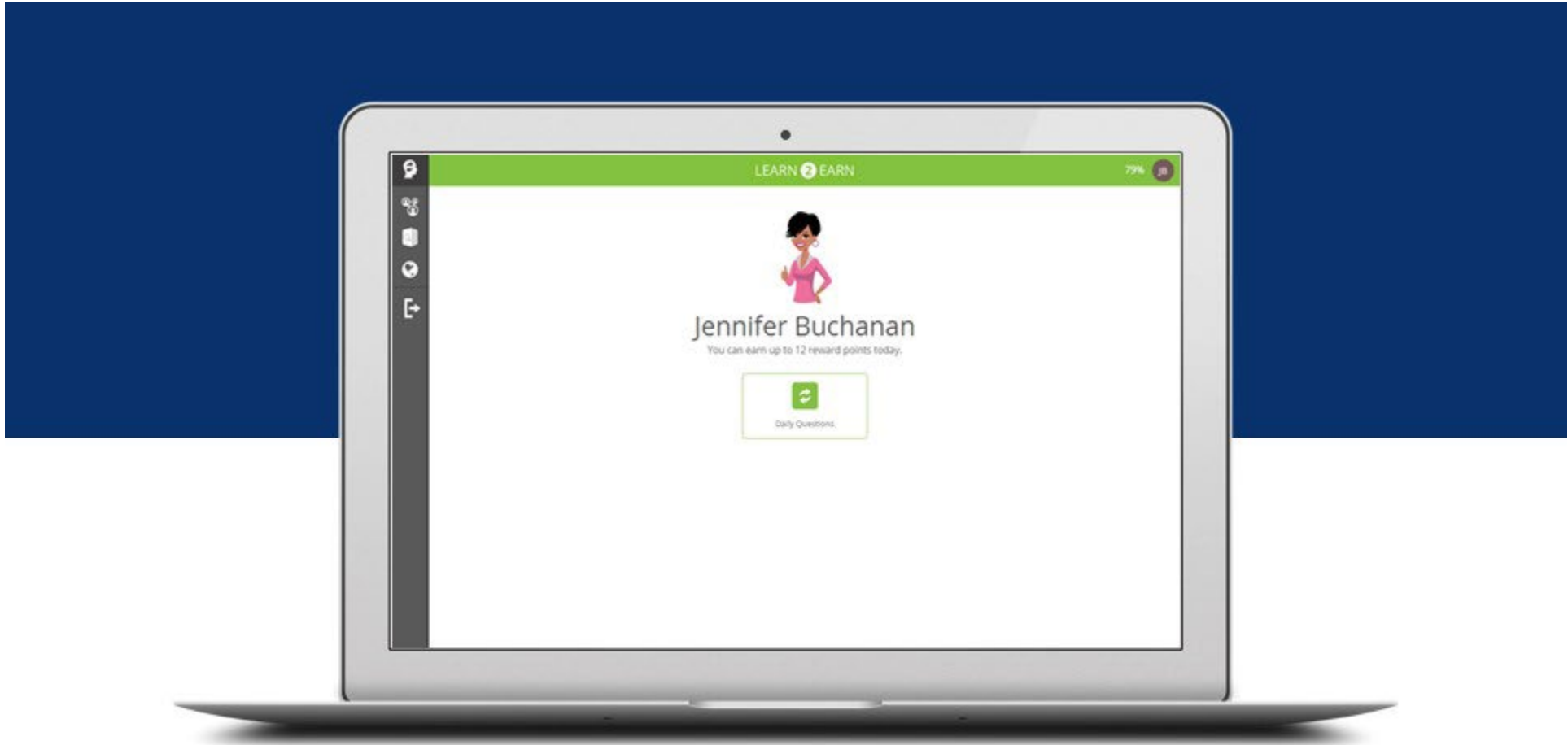




Questions & Answers

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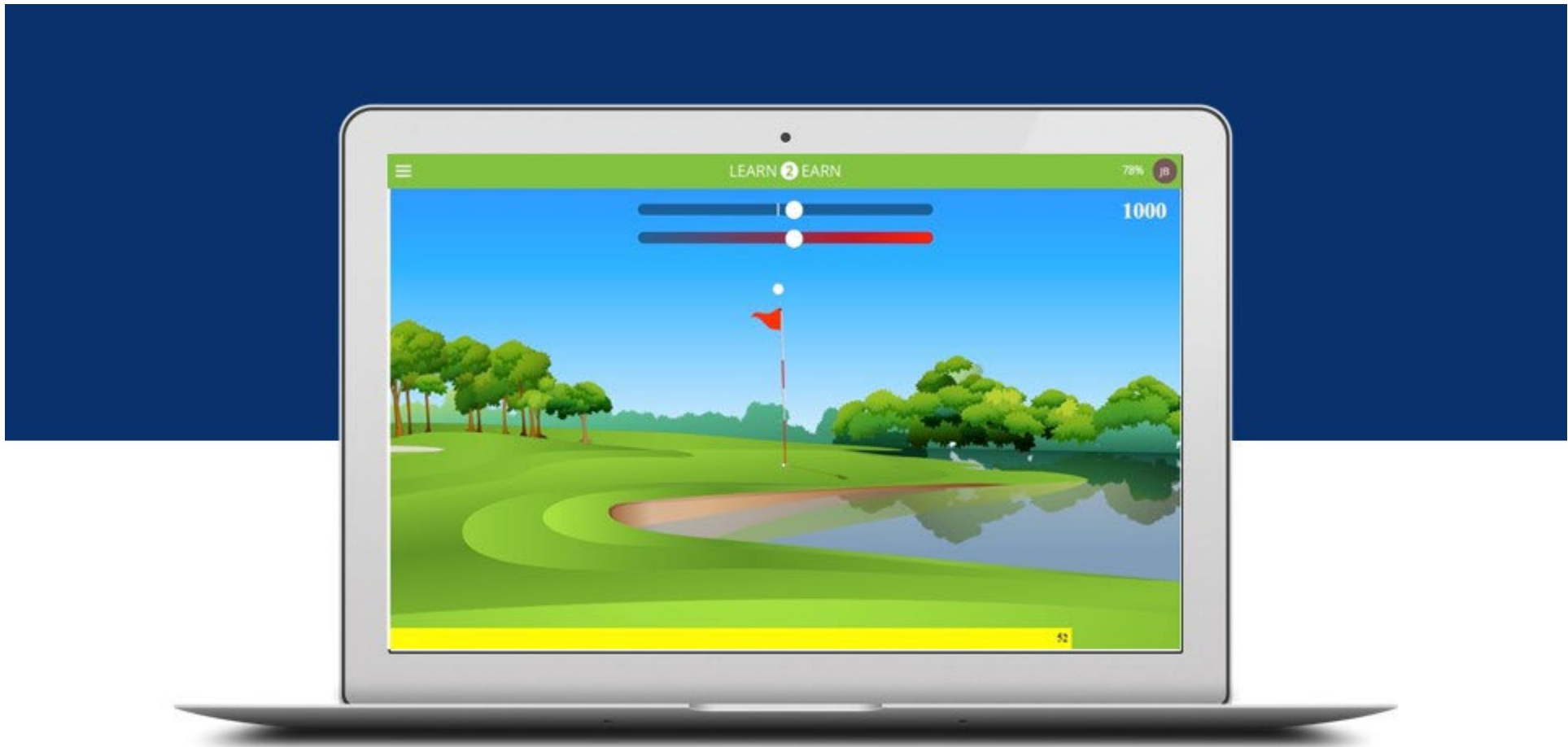




Axonify In Action

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Axonify In Action

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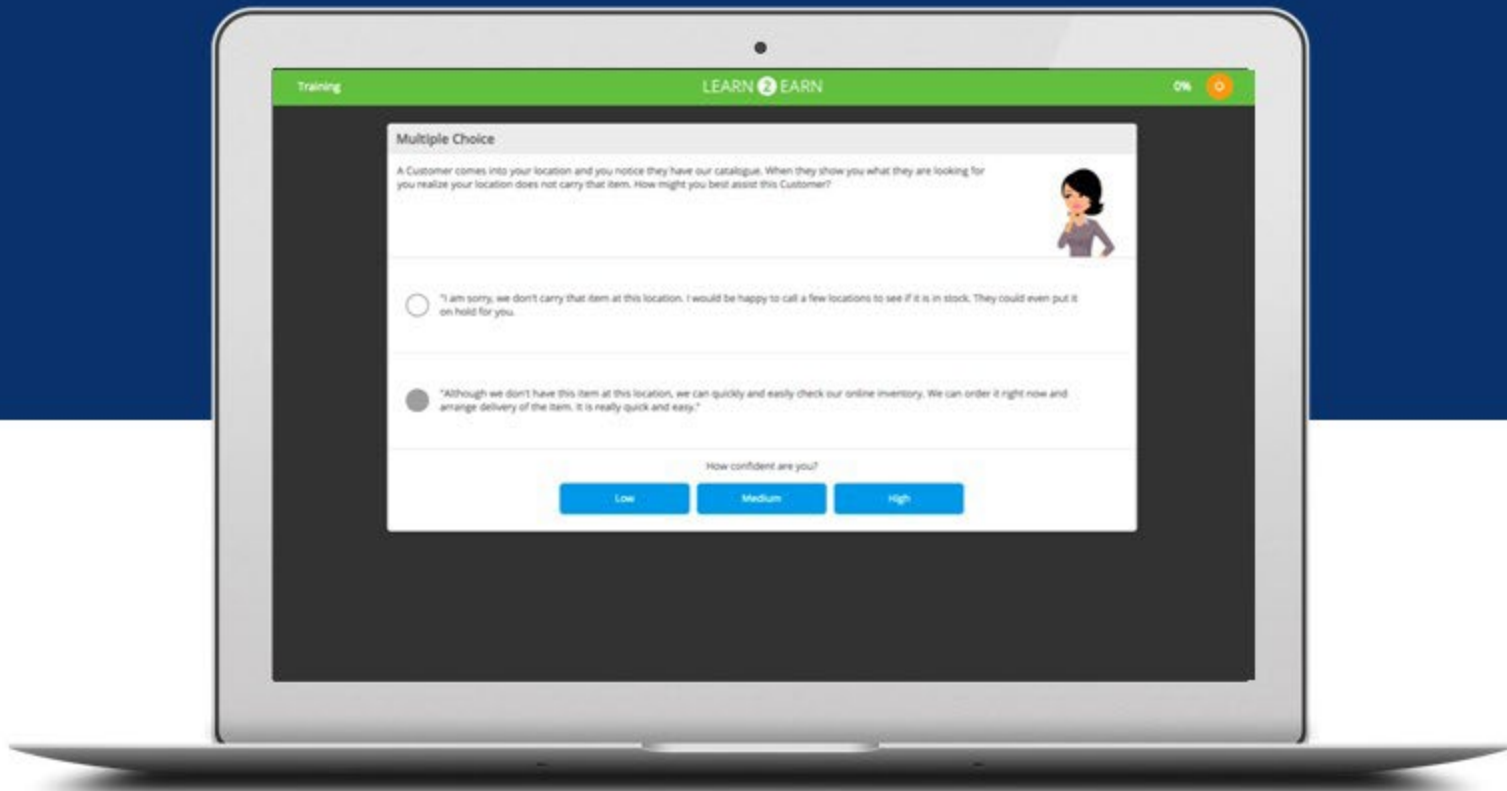




Axonify In Action

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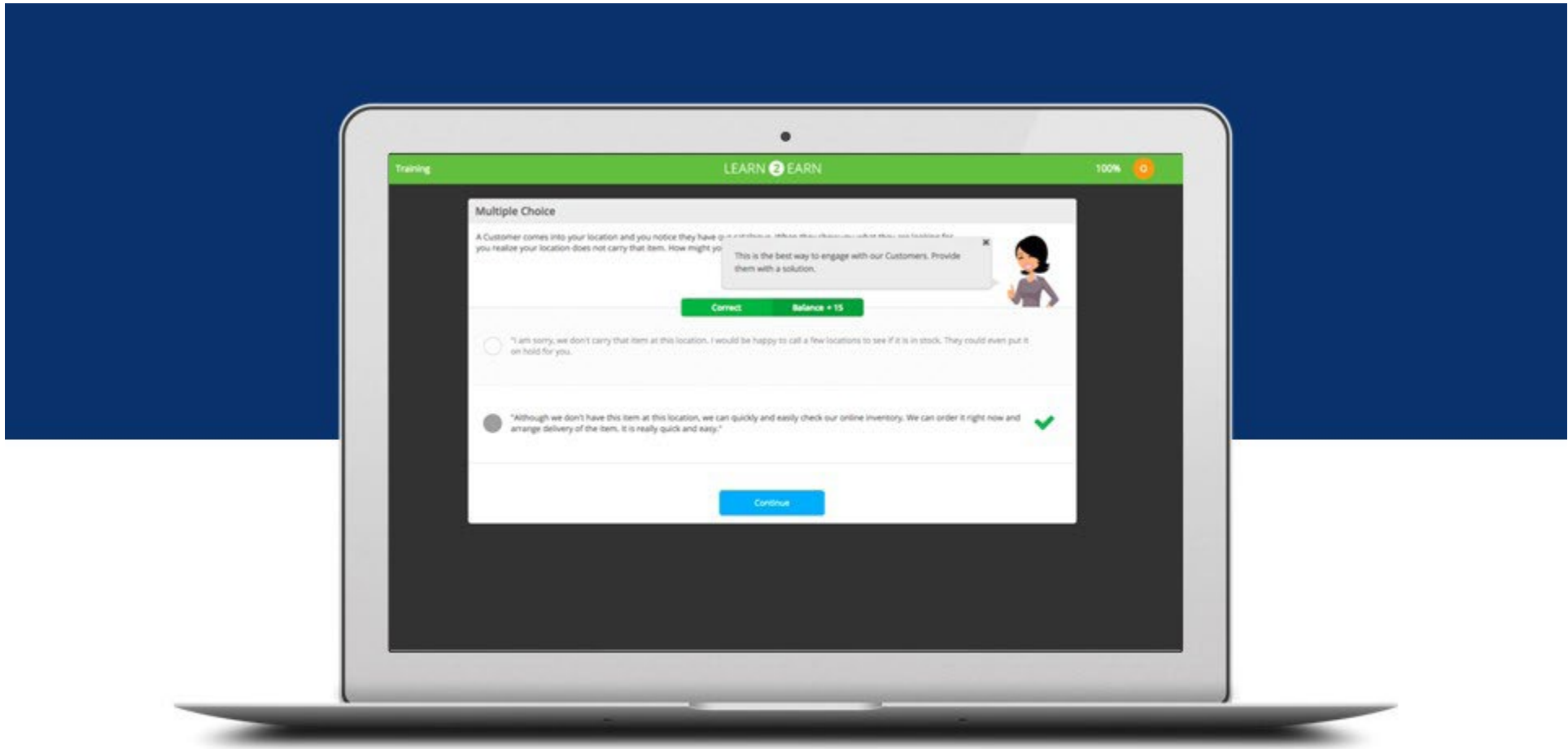




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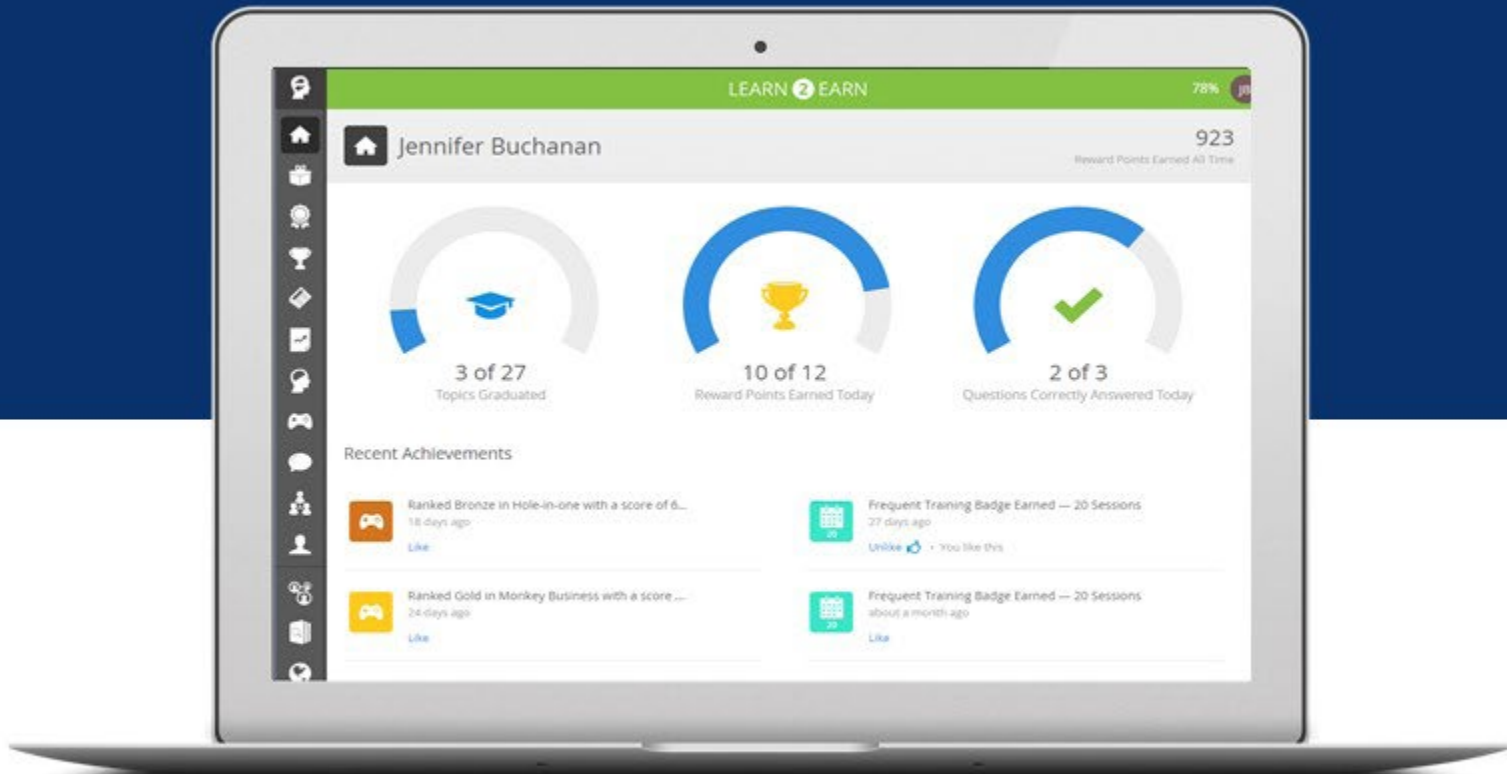




Axonify In Action

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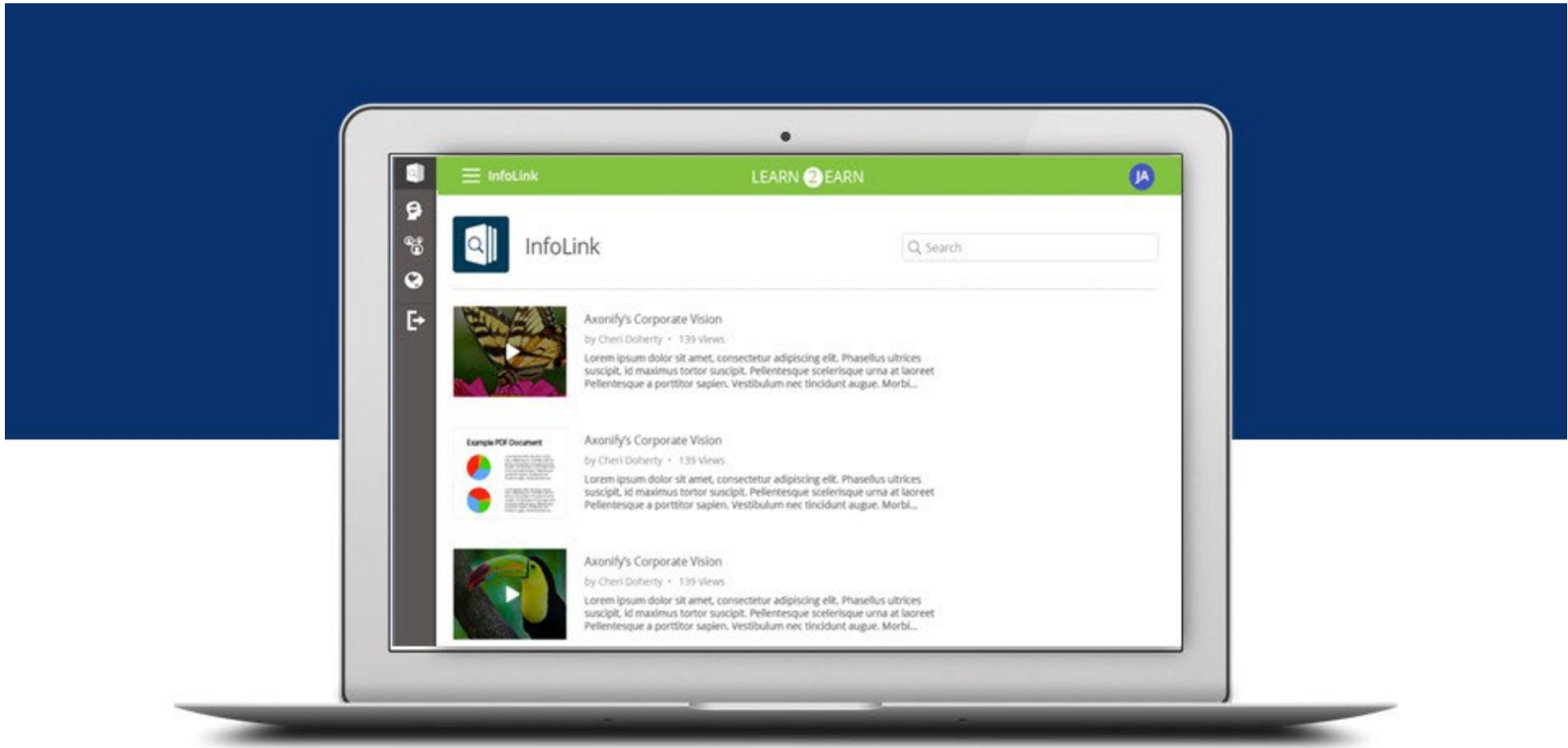




Axonify Certification

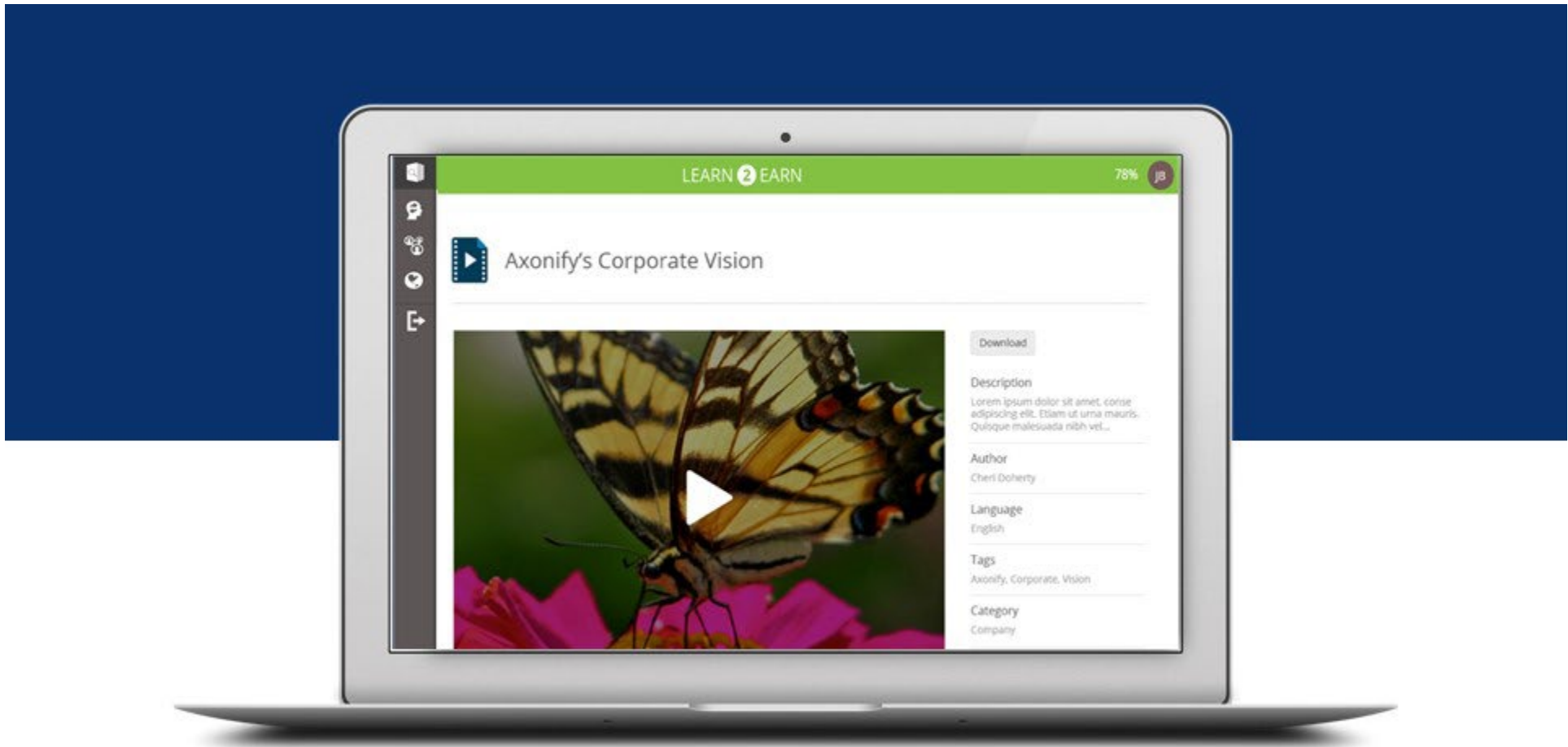
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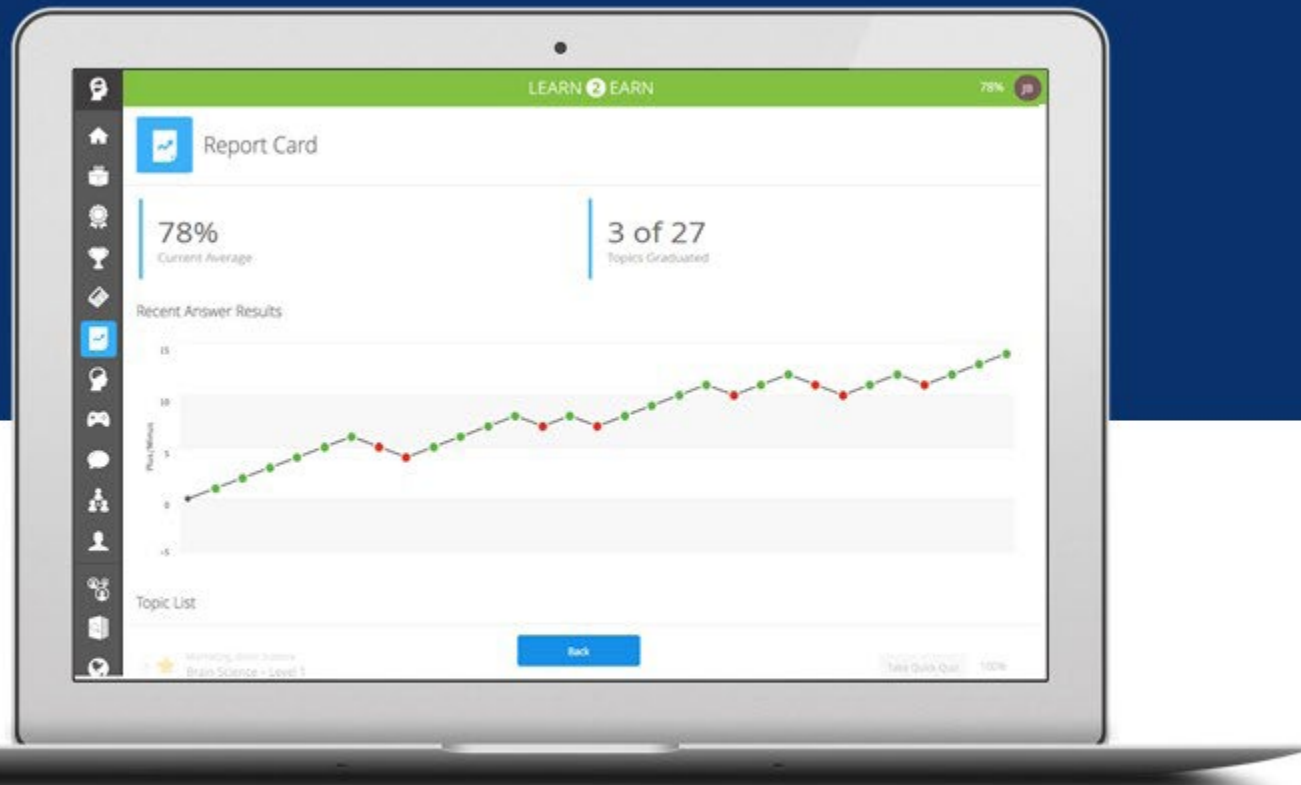
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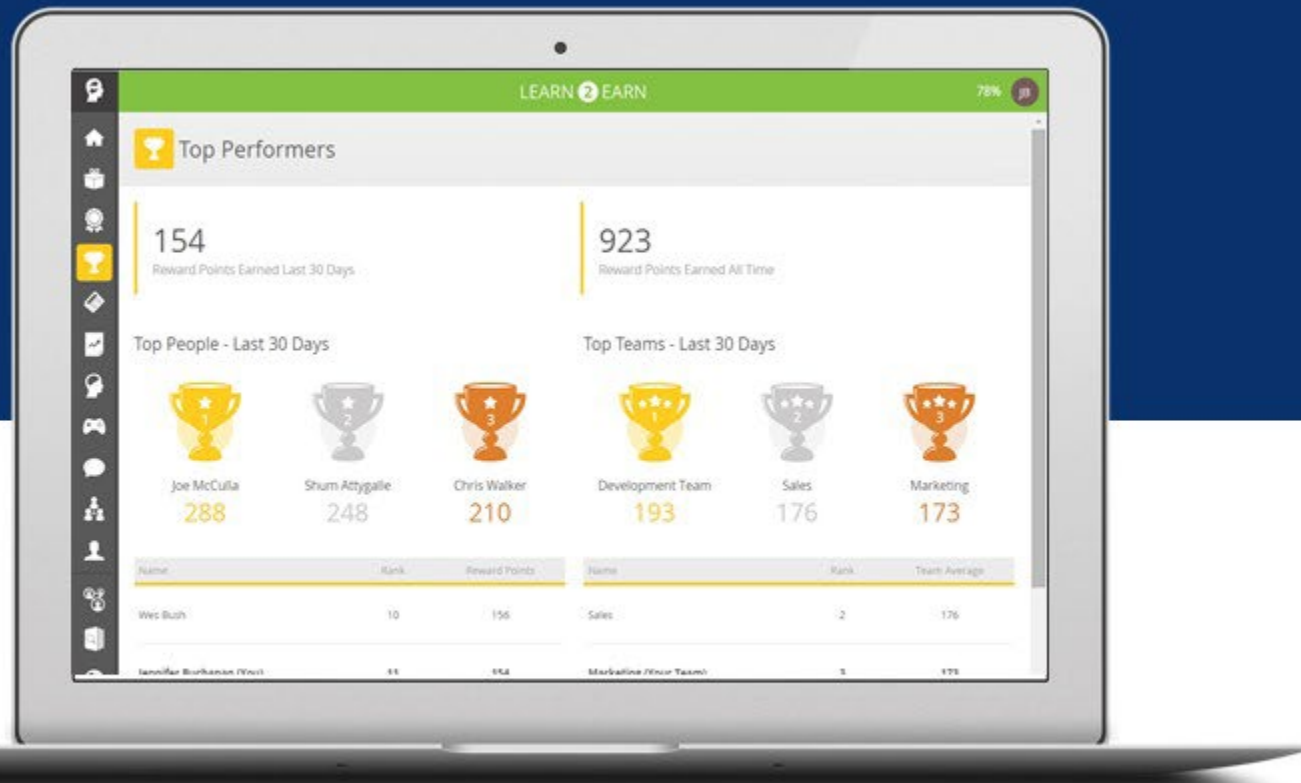




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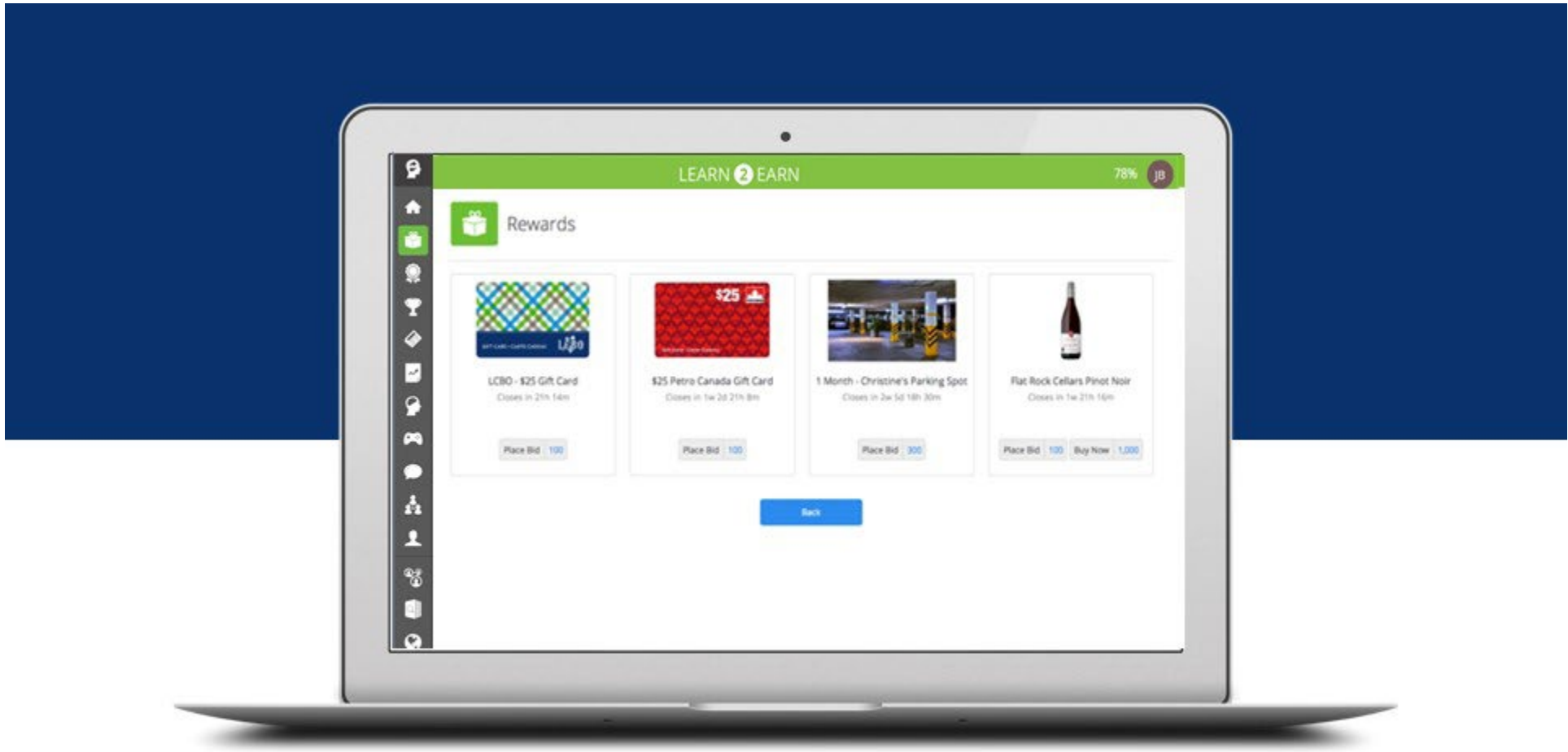




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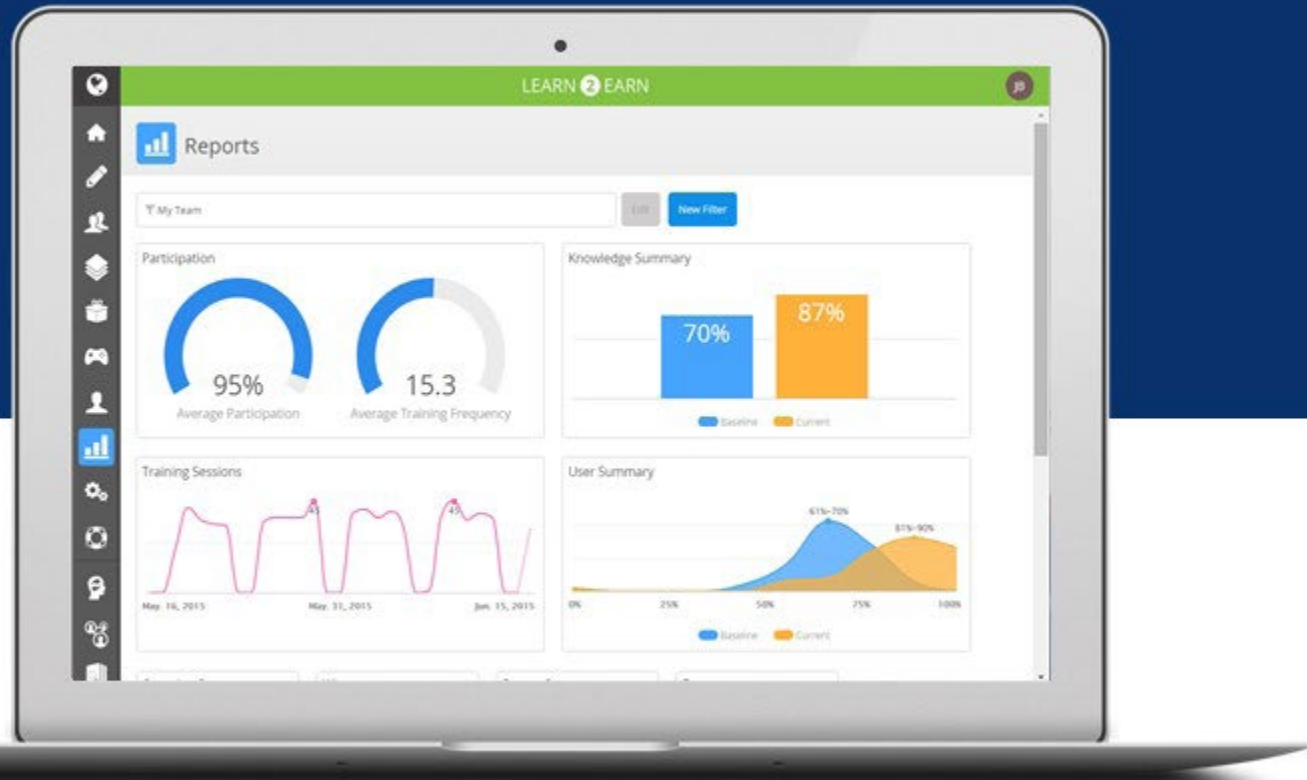




Axonify In Action

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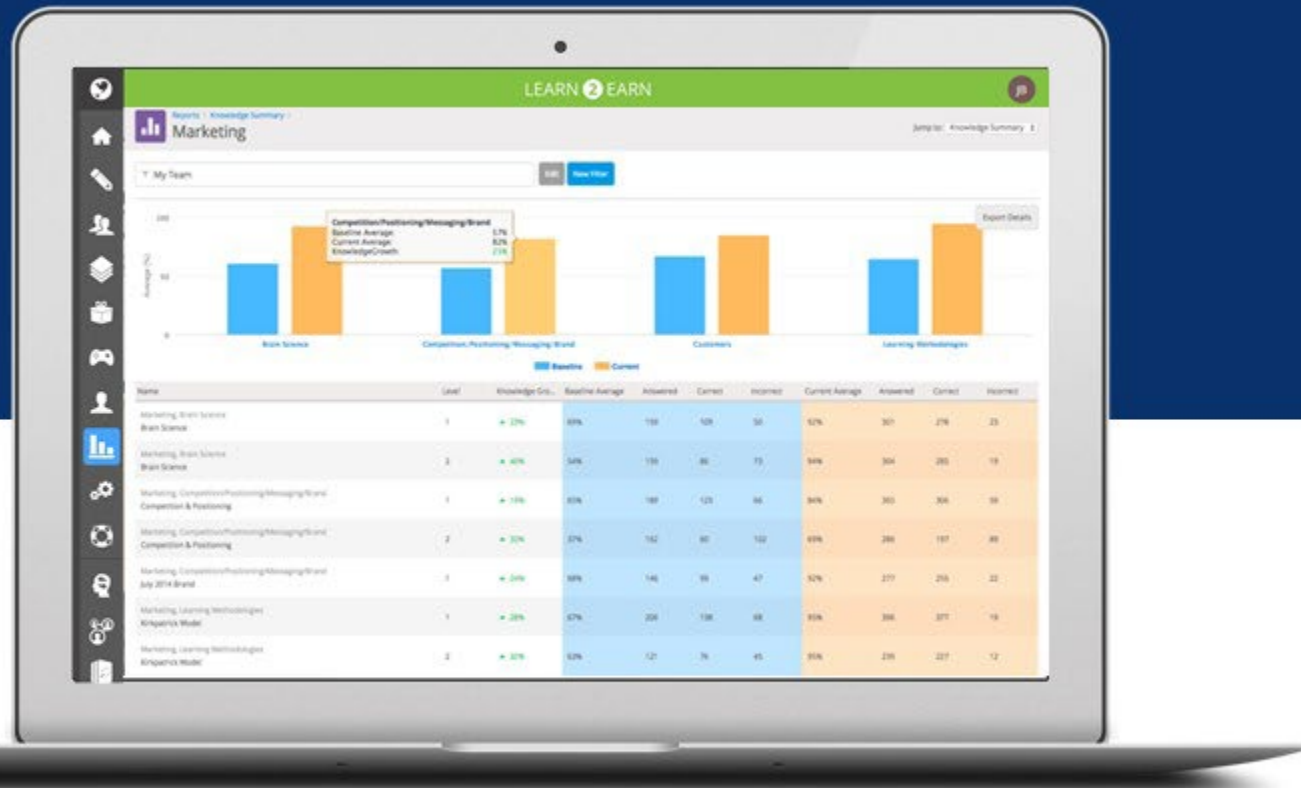




Analytics & Reporting

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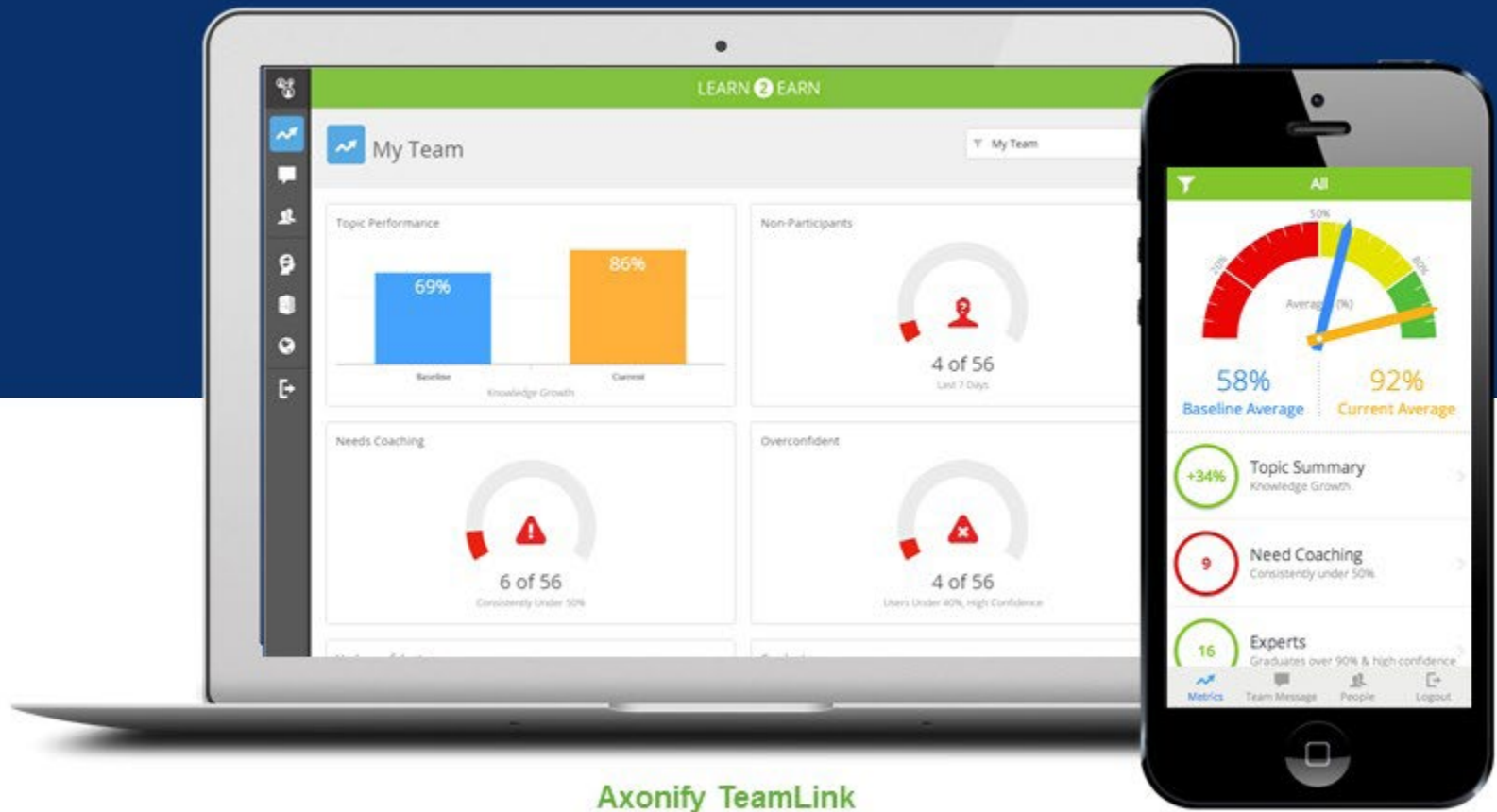




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Presentations

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The Potential of Digital Simulations

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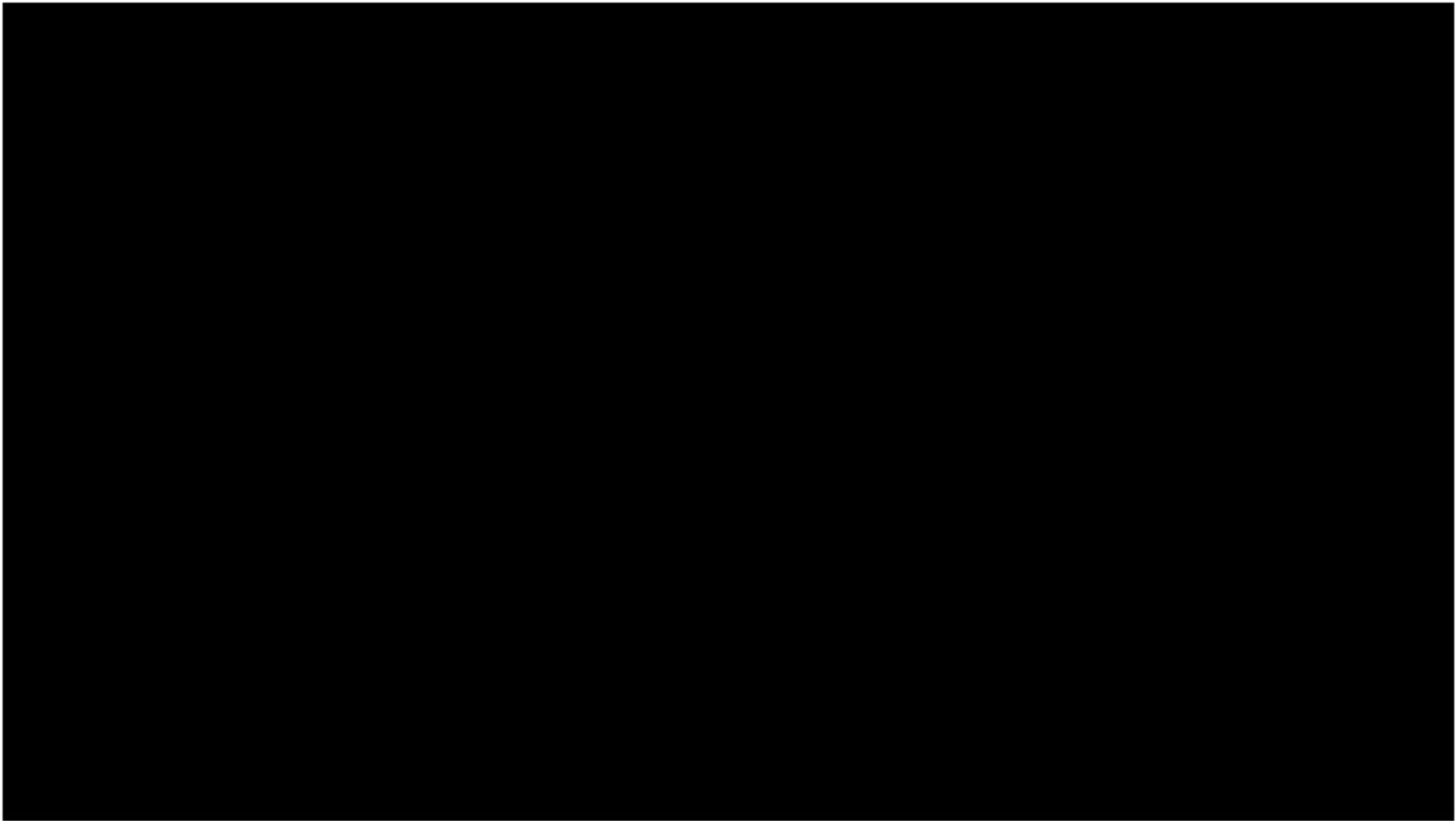
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What is a Digital Simulation?

- Definition: a digital recreation of **realistic situations** that reinforces **learning by doing**, using **decisions** that lead to identifiable results and **consequences**
 - **Scenario simulation** (interpersonal interactions and narrative)
 - Business simulation (run a business or department)
 - Strategy simulation (make priorities and investments over time)
 - Software simulation (desktop interactions)
 - Occupational simulation (flying a plane, performing surgery, making burgers, auditing an engagement)
- Engages learners at the level of **applying, evaluating, creating**



Example: Spotting Development Opportunities



Example: Spotting Development Opportunities

The screenshot shows a dark-themed user interface for a learning application. At the top, there is a navigation bar with a home icon, a central circular logo, and five utility icons: 'Course characters', 'Development techniques', 'Accessibility', 'Help', and 'Exit'. Below the navigation bar, a question is posed: "In which three moments did Saj have the greatest opportunity to help Carole develop?". Six video thumbnails are arranged in a 2x3 grid. The bottom-right thumbnail is highlighted in red and contains a white checkmark, indicating it is the correct answer. The text in this thumbnail reads: "By asking Carole a series of thought provoking questions Saj helps her gain awareness and form her own insights. In the future, she'll be able to apply that thinking to reach other insights." The bottom-left thumbnail is partially obscured by a pink text overlay that reads: "How do you support Carole? Are you willing to help her network? Your observations..." At the bottom left of the interface, the text "Spotting Development Opportunities version 1.0.1030" is visible.

Course characters Development techniques Accessibility Help Exit

In which three moments did Saj have the greatest opportunity to help Carole develop?

When Saj agreed with Carole's recommended outcomes.

When Saj told Carole that Pia's frustrated over the regulatory environment.

When Saj agreed that they should have more meetings like this but with more lead time.

How do you support Carole? Are you willing to help her network? Your observations...

When Saj asked which specific behaviours Carole would like him to focus on as he observes her during the meeting.

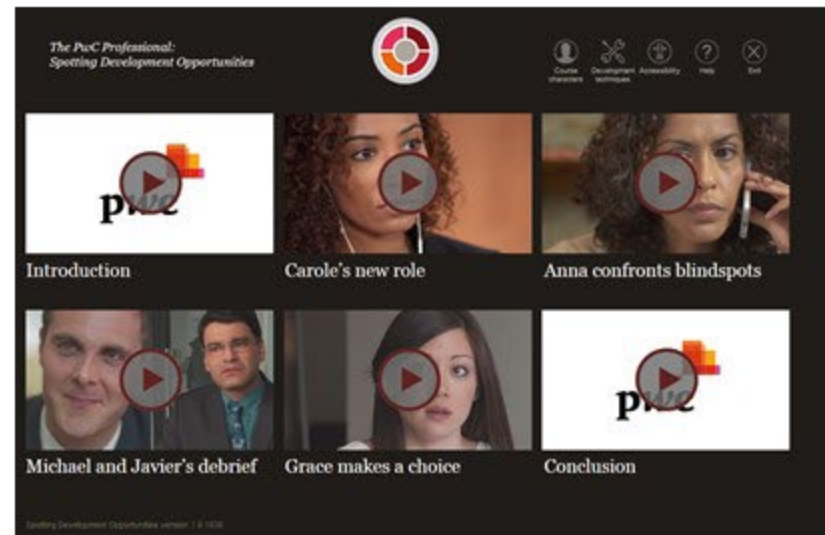
By asking Carole a series of thought provoking questions Saj helps her gain awareness and form her own insights. In the future, she'll be able to apply that thinking to reach other insights.

Spotting Development Opportunities version 1.0.1030



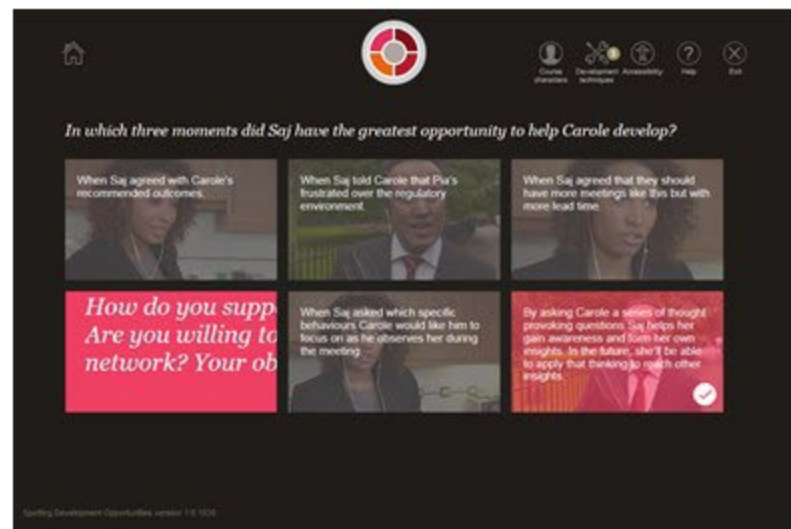
Spotting Development Opportunities

- Team decided **not to design for CPE** (under current standards in 2014)
- Didn't want the experience to feel like a typical self study
- Focus on the **story** and the personalized element
- **Global course** with a global sponsor (US just one constituency)
- Didn't want to go through pilot process
- The final solution is **not far from meeting CPE Standards requirements**



Simulation Design Considerations

- Key is to construct **compelling and realistic** situations (maintaining the immersive impact is important)
- Branching can require more storyboarding and decisions/consequences
- **Learning by doing**, often in situations where the “**right**” choice isn’t clear
- Simulations are all about “**application**” and less about knowledge and comprehension



Future AICPA/NASBA CPE Standards Considerations

Standards (Exposure Draft)	Considerations
S9 – 02. Use of review questions	<ul style="list-style-type: none"> • Not an issue with new proposed standards (“Simulations can be used in lieu...”) • Can build in reflection points within the simulation
S9 – 04. Qualified assessment requirements	<ul style="list-style-type: none"> • Could create a new scenario that includes assessment questions at the end (multiple choice decisions to reinforce key learning points)
S17 – 01. Method 1 - Sample group of pilot testers S17 – 02. Method 1 – CPE credit based on representative completion time	<ul style="list-style-type: none"> • “CPE credit must be recommended based on the representative completion time for the sample [of pilots]” • CPE would be based on a larger pool of pilots’ average time as a best practice



What about micro-sims?

- New opportunities to create **micro-sims** that qualify with proposed **nano-learning** and partial CPE credit standards.

The screenshot displays a simulation interface with a man in a suit sitting at a desk with a laptop. Overlaid on the scene are several text boxes:

- Current** (46):
 - Decision**: Learner: My meeting with the client went very well and I'm building a great relationship with them. We are now ready to move to the review cycle in the next two weeks. I have a follow-up meeting with the client next Tuesday. (Replay)
- Next** (48):
 - Yes it's ok to ask this question (Select)
 - No it's not ok to ask this question (49) (Select)
- Response**:
 - Chris**: Thanks for the update. Things are coming along really well. Your work on this engagement has been critical in helping us meet our goals. Good job!
 - Now that we got business out of the way...how was your weekend? You never told me if you had a boyfriend. What's his name?
- OVERALL SCORES**:
 - Process**: New Hire (Progress bar)
 - Skills**: Recognise Sexual Harassment (Progress bar)

Intro Challenge!

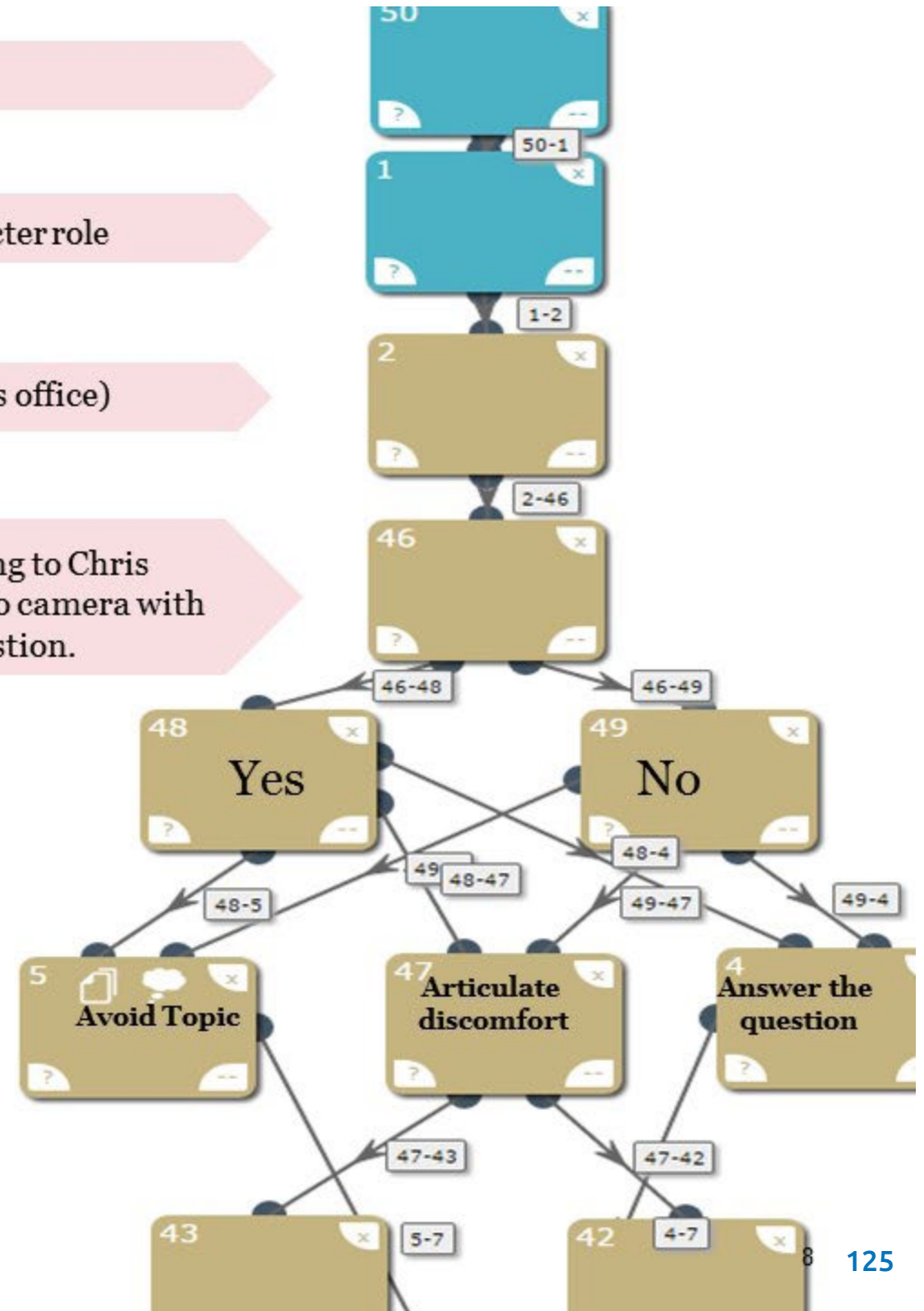
Intro: Learner's sim character role

Speaking to learner (Chris's office)

Statement: Learner speaking to Chris
Response: Chris speaking to camera with possible inappropriate question.



Text and video throughout, with scoring and feedback



Conclusions

- Compelling digital scenario simulations can be created that qualify for CPE
- It's mostly a **design consideration**
- You may need to weave in some “knowledge” and “comprehension” content (limited branching options permit returning to a common point)
- **Avoid “dead end” branches** that end the course early (strive for similar duration regardless of paths)
- The **final assessment** can be presented around a scenario
- Simulations can provide compelling data on learner decisions that allow analysis of gaps and new opportunities for learning
- Simulation authoring tools provide opportunities for collaborative storyboarding and **rapid prototyping and reducing the production cycle**



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