

NASBA

# National Registry Summit

September 26-27, 2017 - Nashville, TN

 **The Tempo of Change**



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## Monday, September 25, 2017

3: 00 pm – 6:00 pm

### Registration

Symphony Ballroom Foyer

## Tuesday, September 26, 2017

7:30 am – 8:30 am

### Registration and Breakfast

Symphony Ballroom Foyer and Symphony III

8:30 am – 8:40 am

### Welcome Message

*Ken L. Bishop, President and CEO, NASBA*

A welcome message from NASBA's CEO will inform participants of current focus projects of NASBA.

Symphony I

8:40 am – 10:40 am

### Brain Science: Achieve the Optimal Learning Experience with Boosts and Bursts

*Art Kohn, Professor, Portland State University School of Business*

Symphony I

American corporations spend about \$60 billion a year training their employees but research shows that today's employees only retain a small fraction of training content- and an even smaller fraction ultimately gets transferred back to their workplaces.

Professor, writer and consultant Art Kohn, will challenge that what we do after training can be more important than what we do during training. Master core principles for developing engaging training programs and learn techniques that help people retrieve key points in the hours and days after training.

10:40 am – 11:00 am

### Break

**11:00 am – 12:15 pm**

### **Nano Learning Examples**

*Ed Kelly, Blue Ocean Brain*

*Tie Miller, AICPA*

*Lisa Anderson, PwC*

*Moderated by Jessica Luttrull, Associate Director,  
National Registry*

Symphony I

The National Registry of CPE Sponsors team is often asked if there are examples of nano learning programs to review. In this session you will hear from a moderated panel of three sponsors, who have been approved for the nano learning delivery method on the National Registry, as each presents their approved nano learning program and shares experiences regarding development, business case and strategy for use.

**12:15 pm – 1:30 pm**

### **Lunch with Table Topics**

Symphony III

**1:30 pm – 2:00 pm**

### **Tips on Applying for Nano and Blended Learning**

*Miki Klein, Instructional Design Administrator,  
National Registry*

*John Owsley, Instructional Design Administrator,  
National Registry*

Symphony I

Are you a sponsor considering applying for the nano and blended learning delivery methods? Our instructional design administrators will walk you through each step of the preliminary application review process, including what information is reviewed and considered and how to avoid common pitfalls.

**2:00 pm – 2:45 pm**

### **Implementing the CPE Standards - Avoid Compliance Pitfalls**

*Jeff Price, Instructional Design Administrator,  
National Registry*

*Jeanetta Cothron, Compliance Auditor,  
National Registry*

Symphony I

Take preventative action by understanding how to implement CPE Standards and becoming aware of possible obstacles to compliance with the National Registry and CPE Standards. This session will focus on the requirement for elements of engagement in group live programs, the requirement of a CPE program sponsor to monitor attendance, provide best practices in these areas, and more.

2:45 pm – 3:00 pm

### Break

3:00 pm – 4:15 pm

### Reaching Your Entire Audience: Failsafe Approaches for Engaging Introverts

*Jennifer Kahnweiler, Ph.D., Author and Global Speaker*

Symphony I

How many times have you asked a question in a training session and received no response? Or have you sat in a class where the pace is so fast and furious that quieter participants are never heard?

Drawing from her groundbreaking research on introverts, Jennifer Kahnweiler, Ph.D., CSP will teach you how your training design and delivery can reach the entire audience, not just those who are more vocal. By learning ways of balancing introvert and extrovert energy and incorporating creative facilitative techniques, your content will have a lasting impact on learners. Discover how to leverage technology to engage introverts in highly meaningful ways and how you can flex your approach to reach everyone.

4:15 pm – 4:30 pm

### Day 1 Closing Remarks

Symphony I

5:00 pm – 7:00 pm

### Connections and Cocktails

Skylight Foyer on the Mezzanine Level

## Wednesday, September 27, 2017

7:30 am – 8:30 am

### Breakfast

Symphony III

8:30 am - 8:40 am

### Welcome

*Alfonzo Alexander, President, NASBA Center for Public Trust*

Symphony I

8:40 am – 9:00 am

### Reinforcement Kickoff

*Art Kohn, Professor, Portland State University School of Business*

Art Kohn will demonstrate a technique to “boost” learning after a training event.

Symphony I

**9:00 am – 9:30 am**

### **Compliance Matters**

*Jessica Luttrull, Associate Director, National Registry*

Symphony I

Feedback from previous National Registry Summits indicated an interest in information not only about the CPE Standards but also other matters that affect a CPA's compliance with rules and regulations. This session will provide updates and information focusing on compliance matters including the Exposure Draft of the CPE Model Rule; acceptance of Nano and Blended Learning and technical review CPE credit with the U.S. jurisdictions; and the revised fields of study.

**9:30 am – 9:45 am**

### **Break**

**9:45 am – 11:45 am**

### **Tools and Resources Showcase**

*Conferences i/o - John Pytel*

*Smartsheet - Jonathan Kraftchick, Cherry Bekaert*

*Branch Track - Sergey Snegirev*

Symphony I

This session will highlight three different resources that can assist you in implementing the CPE Standards (e.g. elements of engagement and attendance monitoring). Learn how these tools and resources can benefit and boost your training experiences.

**11:45 am – 12:00 pm**

### **Ask NASBA! and Summit Closing Remarks**

*Jessica Luttrull, Associate Director, National Registry*

*Alfonzo Alexander, President, NASBA Center for Public Trust*

Symphony I