Day One
Sunday, May 18th

Attendee Registration
12:00pm - 7:00pm

Breakout Sessions
1:00pm - 2:15pm
2:45pm - 3:45pm
4:00pm - 5:00pm

Product Exploration Workshops
1:00pm - 2:30pm (Payroll)
3:00pm - 4:30pm (Accountancy)
3:00pm - 5:00pm (Swipeclock Basecamp Live)

Welcome Reception
6:30pm - 8:30pm

Day Two
Monday, May 19th

Sunrise Yoga Session| *6:00am - 6:30am*

Breakfast | *6:30am - 7:30am*

General Session | *7:45am - 9:15am*

Morning Networking Break | *9:15am - 9:45am*

Breakout Sessions
10:00am - 11:00am
11:10am - 12:10pm

Lunch | *12:15pm - 1:15pm*

Breakout Sessions
1:30pm - 2:30pm
2:40pm - 3:40pm

Afternoon Networking Break | *3:45pm - 4:30pm*

Breakout Session | *4:30pm - 5:30pm*

INSPIRE Evening Event | *To Be Announced!*

Day Three
Tuesday, May 20th

Breakfast | *6:30am - 7:30am*

General Session | *7:45am - 9:30am*

Morning Networking Break | *9:30am - 10:30am*

Breakout Sessions
10:30am - 11:30am
11:40am - 12:40am

Lunch | *12:45pm - 1:45pm*

Breakout Sessions
1:45pm - 2:45pm
3:00pm - 4:00pm

IN>
SPIRE
.IRIS
User Conference

Day One

Breakout Sessions
1:00pm - 2:15pm

*Additional Registration Required

Integrations Workshop
In this session, we will explore common integrations for STAR and Practice Engine, delving into how they are implemented to streamline operations and enhance efficiency. We'll discuss the benefits of integrating with key systems, including XCM, GL, and CRM tools, highlighting how these connections can drive seamless workflows and improved outcomes. Join us to gain valuable insights and practical guidance on leveraging integrations to maximize the value of your systems.

Apex HCM - Advanced Payroll User Functionality
Coming Soon!

What's New in Doc.It and iChannel
This session will dive into the latest updates, features, and enhancements in Doc.It and iChannel. Attendees will gain practical insights into leveraging these updates for maximum impact in their practices.

Breakout Sessions
2:45pm - 3:45pm

*Additional Registration Required

Billing Workshop
This hands-on workshop will focus on the transformative benefits of automated billing in Practice Management. Discover how Practice Engine and STAR's billing capabilities can simplify your billing processes, improve accuracy, and save valuable time. We will learn how to leverage PE's Scheduled and Recurring Bills, as well as STAR's Auto Billing and e-Billing. Gain practical insights into setting up and optimizing these features to enhance efficiency and ensure consistent revenue flow. Whether you're new to automated billing or looking to refine your approach, this session will provide actionable strategies to elevate your billing operations.

Apex HCM - Advanced Import & Data Extract Wizard
Coming Soon!

Advanced Features in Doc.It for Enhanced Efficiency
Unlock the full potential of Doc.It with advanced features designed to streamline workflows, improve document management, and boost firm productivity. This session explores automation tools, secure collaboration, and time-saving functionalities to enhance efficiency. Learn how to maximize Doc.It's capabilities for a more organized and productive firm.

Breakout Sessions
4:00pm - 5:00pm

*Additional Registration Required

BPA, PowerBI, and Reporting Workshop
In this session, we'll showcase how clients can harness the power of BPA within their Practice Management software to stay ahead in a competitive industry. Learn how to unlock the full potential of your current product, streamline operations, and drive efficiency. This discussion sets the stage for the upcoming "Unlocking the Power of IFM Reporting" session later in the conference, offering foundational insights to help you optimize workflows and prepare for advanced reporting capabilities.

Apex HCM - Advanced Payroll User Functionality
Coming Soon!

Customization and Reporting within iChannel for Better Insights
Discover how integrating Microsoft Power BI with iChannel transforms your firm's reporting capabilities. This session showcases how to connect Power BI to iChannel, enabling custom reports and real-time insights into key performance indicators. Learn how our experts can help you develop tailored reports to drive efficiency and data-driven decision-making. Gain the tools to automate reporting, enhance transparency, and improve firm performance. Join us to see Power BI in action!

Sunday, May 18

INSPIRE.IRIS
User Conference

Day Two

IN>SPIRE.IRIS User Conference

Breakout Sessions
10:00am - 11:00am

IFM Progress - One Year Ago to Today
This session will delve into the evolution of IRIS Firm Management (IFM) over the past year, examining advancements in features, usability, and client outcomes. Attendees will learn how the platform has addressed industry challenges, how firms have benefited from adopted, and what lies ahead in its innovation roadmap.

Payroll Trends, Tech, and Tactics for Success
As payroll operations continue to evolve, staying ahead of industry trends is crucial for firms to remain compliant, efficient, and competitive. In this session, we'll explore the critical payrolls trends expected to shape the industry in 2025 and beyond. From emerging technologies like AI and automation to evolving regulatory landscapes and workforce management challenges, this session will equip attendees with the insights needed to future-proof their payroll strategies.

Payroll Compliance: Breaking Down Forms, Calculations, and Risk
As regulatory frameworks evolve, payroll professionals must stay ahead of compliance trends to avoid costly mistakes and maintain operational excellence. This session explores the latest updates in payroll compliance, with a focus on key forms, critical calculations, and emerging legislative impacts. Attendees will leave with actionable insights and strategies to streamline compliance processes and mitigate risks.

Document Management and Keeping Pace with Industry Trends
This one-hour session explores the evolving landscape of document management for CPA firms and accounting professionals. Participants will gain insights into best practices, emerging trends, and practical strategies to streamline document workflows, ensure compliance, and drive firm productivity.

Breakout Sessions
11:10am - 12:10pm

Scaling the Smart Way: Growth Through Acquisition
Join us for an engaging discussion panel designed to provide firms with a platform to explore strategies, challenges, and opportunities in data management and business growth. This session will highlight insights from IRIS and other industry leaders on how effective data utilization and management can drive business growth while maintaining operational integrity. Topics include overcoming challenges with system mergers, addressing data inconsistencies, and aligning company goals. Discover how leveraging data integration can become a springboard for operational efficiency, scalability, and long-term success.

Work Smarter, Not Harder: Automate and Elevate Document Management
Efficient document management is no longer optional—it's essential. Manual processes, disconnected systems, and compliance demands can slow CPA firms down and increase risk. This session will explore how workflow automation can transform document management from a tedious task into a strategic advantage. Attendees will gain insights into best practices for automating document workflows, reducing manual tasks, and enhancing collaboration and compliance across their firm.

The Path to Penalty Relief: Expert Insights on IRS Abatement
Penalties and interest from the IRS can have a significant financial impact on individuals and businesses. This session dives deep into the IRS abatement process, providing CPAs with the tools, strategies, and knowledge to navigate complex abatement scenarios and secure successful outcomes for clients. Attendees will gain actionable insights on how to effectively advocate for their clients, mitigate penalties, and manage the abatement process from start to finish.

Keeping Pace with Change: KYC/AML Compliance Trends
This one-hour CPE session will cover the latest trends and challenges in Know Your Customer (KYC) and Anti-Money Laundering (AML) compliance. As global regulatory standards evolve, accounting professionals must stay ahead of these changes to mitigate risks and ensure compliance. This session provides actionable insights into the most recent developments, tools, and strategies for staying compliant in 2024 and beyond.

Breakout Sessions
1:30pm - 2:30pm

Enhancing Month-End Processes for Practice Management
This session will provide accounting professionals with actionable strategies and tools to streamline month-end processes within their firms. Attendees will explore best practices for closing the books efficiently, leveraging technology to enhance accuracy, and implementing workflows that foster collaboration and compliance.

Document Management API and Integration Capabilities
This session will provide attendees with an understanding of the API and integration capabilities within Doc.It by IRIS and Channel by IRIS. It will focus on how these features drive efficiency, enhance collaboration, and streamline workflows for accounting and payroll professionals. Through practical examples, attendees will learn to leverage APIs to connect disparate systems, automate processes, and unlock new levels of productivity.

The Future of Work: HCM Trends Redefining the Workforce
In this session, we will explore the critical trends reshaping Human Capital Management (HCM) as we move into 2025 and beyond. From evolving workforce expectations to new technologies and compliance requirements, we'll discuss how organizations can stay competitive, compliant, and agile in an ever-changing global workforce landscape.

Price Increase University
This one-hour session will focus on providing CPAs and business leaders with the knowledge and tools to effectively manage price increases while maintaining customer loyalty, sustaining growth, and optimizing profits. The session will cover the core principles, strategies, and practical steps for implementing price increases in today's competitive market.

Breakout Sessions
2:40pm - 3:40pm

Different Perspectives: The Journey of Implementing Practice Management
Implementing practice management software is not a one-size-fits-all journey. This session dives into the implementation process from both the firm's and the vendor's perspectives, providing insights into overcoming common challenges, aligning expectations, and ensuring seamless adoption. Participants will leave with actionable strategies to lead successful implementations, create value for their teams, and build stronger vendor partnerships.

How to Hire Payroll & HR Salespeople & Grow Your Business through Systematic Referral System feat. Workplace HCM
Discover how Frank Plum transformed Workplace HCM from the ground up to $4.2 million in annual billing in under seven years. Frank will break down the key strategies that fueled this growth, including building a high-performing sales team, structuring an effective compensation plan, and successfully recruiting top payroll and HR sales professionals.

Beyond 9-to-5: Embracing Gig & Alternative Workforces
The rise of the gig economy and alternative employment models is reshaping the workforce landscape. CPA firms and HR professionals must adapt to this shift, balancing flexibility with compliance, and strategic growth with worker satisfaction. This session will explore the legal, operational, and financial considerations for leveraging gig workers and non-traditional employment arrangements while maintaining compliance and optimizing workforce efficiency.

The Art of the Deal: Positioning Your Firm for a Lucrative Exit
Mergers and acquisitions (M&A) are reshaping the accounting and payroll industries. Whether you're looking to retire, merge with a larger entity, or pivot your firm to new leadership, preparing for a successful exit requires strategic planning, valuation optimization, and operational readiness. In this session, industry experts will guide you through the key steps to maximize your firm's value, minimize risks, and execute a seamless exit strategy.

Breakout Sessions
4:30pm - 5:30pm

Power of the Panel: Utilizing iChannel's Automations Tool
Discover how the iChannel Portal can revolutionize your daily operations by automating essential tasks. This session will provide a comprehensive demonstration of the Portal's capabilities, showcasing how it streamlines workflows, reduces manual effort, and enhances productivity. Learn practical ways to leverage automation for improved efficiency and focus on what matters most- delivering exceptional results.

Proven Business Development Tactics for Accountants and Payroll Leaders
In today's competitive market, accounting and Payroll Firms must go beyond traditional services to thrive. This session focuses on actionable strategies to drive sustainable business development and client engagement, helping firms unlock new revenue streams, improve client retention, and position themselves for long-term growth.

Leveraging Swipeclock for Smarter Workforce Management
This session will focus on how Swipeclock's time management capabilities can help organizations align with current Human Capital Management (HCM) trends, offering tangible benefits for both businesses and their clients. Attendees will explore the latest features of Swipeclock, from automated timekeeping to advanced scheduling and compliance management, while also understanding how these tools can increase efficiency, reduce labor costs, and enhance employee engagement.

FedNow
Coming Soon!

Day Three

Tuesday, May 20

INSPIRE IRIS User Conference

Breakout Sessions
10:30am - 11:30am

Drive Success with Swipeclock: Partner Spotlights and Best Practices
Discover the inspiring success stories of top partners and learn how they've effectively utilized Swipeclock to drive exceptional results. Through their testimonials, gain valuable insights into how these industry leaders have leveraged partnerships to achieve their goals, optimize processes, and create lasting value in their respective fields.

The Next Chapter of IRIS Firm Management: Continuing the Vision Beyond 2025
In this session, attendees will gain an exclusive look at the future of IRIS Firm Management (IFM) and how the solution will continue to evolve to meet the needs of modern CPA firms. From new features and integrations to enhanced automation and AI capabilities, this session will outline how IFM will empower firms to drive operational excellence, unlock new revenue opportunities, and remain competitive in an evolving accounting landscape.

The Future of IRIS Payroll
Explore the exciting future of IRIS Payroll in this visionary session. We'll share the strategic roadmap and highlight upcoming developments designed to empower businesses with innovative solutions. Gain insight into how IRIS Payroll is evolving to meet industry demands, improve efficiency, and deliver greater value. This session offers a glimpse into what's ahead, ensuring you stay informed and prepared to leverage the next generation of payroll technology.

HR 2.0: Transforming Processes with AI & Automation
This session will explore the transformative power of Artificial Intelligence (AI) and automation in HR processes. Participants will learn how these technologies are revolutionizing talent management, payroll, compliance, and employee experience. The session will highlight practical applications, success stories, and the essential steps to adopt AI-driven HR solutions.

Breakout Sessions
11:40am - 12:40pm

Unlocking the Power of IFM Reporting: Integrating APIs, PowerBI, and Cutting Edge Tech
In today's data-driven world, managing and leveraging financial information efficiently is key for firm growth. This session dives into how IRIS Firm Management (IFM) reporting, combined with APIs, PowerBI, and supporting technologies, can elevate the way CPAs interact with and analyze their financial data. Attendees will learn practical techniques for transforming data into insights and driving productivity across firm operations.

Igniting Firm Efficiency: The Integration of Business Central and IRIS Firm Management
Attendees will explore how the seamless integration between Microsoft Dynamics 365 Business Central and IRIS Firm Management (IFM) can revolutionize accounting firm operations. This session will dive deep into the benefits, practical applications, and technical considerations of integrating these two powerful solutions to streamline processes, enhance data flow, and boost productivity.

The Future is Integrated: Advancing Payroll and HCM Integrations
In this session, we will explore the critical importance of integrating Payroll and Human Capital Management (HCM) systems to streamline operations and deliver enhanced value to clients. Attendees will gain insights into existing integrations and best practices for building offerings that seamlessly connect Payroll with HCM functionalities, improving efficiency and reducing errors. We'll dive into how these integrations support the future of the workforce, enabling businesses to make more informed decisions, automate processes, and deliver a unified employee experience.

Client Panel
Coming Soon!

Breakout Sessions
1:45pm - 2:45pm

IFM Productivity Suite
Join us for an in-depth demonstration of the exciting new features coming in the May 2025 IFM release. This session will highlight how these updates are designed to enhance productivity and streamline workflows, providing tangible benefits to your daily operations. We'll share an exclusive look at the roadmap for the next iteration, offering insights into the long-term vision for the suite. Don't miss this opportunity to stay ahead of the curve and see what's in store for the future of IFM!

Bridging the Gap: Navigating the Generational Divide in Management
This session will explore the generational gap in management and provide actionable insights for fostering collaboration across diverse age groups in the workplace. It will address the distinct perspectives, communication styles, and leadership preferences of different generations, offering strategies for managers to effectively navigate these differences and create a more cohesive, productive team environment.

Employee Experience & Engagement
In today's workplace, fostering employee experience and engagement is more important than ever. This session blends insights on emerging trends, industry best practices, and practical applications to help you build a thriving workplace culture. We'll explore how Swipeclock and Partner Integrations can support and enhance these best practice, offering solutions to streamline processes and empower your team. Gain actionable strategies and discover tools designed to boost engagement, productivity, and overall employee satisfaction.

Leveling Up Your Payroll with Predictive Analytics
Coming Soon!

Breakout Sessions
3:00pm - 4:00pm

Client Panel
Coming Soon!

Preparing for IRIS Payroll
Get ready to make the move to IRIS Payroll with confidence. This session will guide you through the steps needed to prepare your processes and data for a seamless transition. We'll outline key considerations, provide actionable tips, and share what's ahead for existing customers, ensuring alignment with the latest updates and goals. Don't miss this opportunity to gain clarity, set expectations, and lay the groundwork for success with IRIS Payroll.

Practice Audits and IFM FAQs
This interactive session will empower attendees to leverage Practice Audits as a tool for evaluating firm operations, compliance, and productivity. We'll answer frequently asked questions and explore how to align your firm's processes with industry best practices.

Unlock Partnerships with Swipeclock
An in-depth exploration of partnership and ecosystem opportunities, highlighting strategies to optimize collaboration and deliver tailored solutions. This comprehensive approach focuses on understanding unique needs, identifying synergies, and maximizing value, ensuring both partners and their clients receive exceptional support and impactful results.