



IMA Live!: Course Listing											Updated on: 06/01/22	
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Course #	Field of Study	Title	CPE Credit	Product Description	Learning Objectives	Knowledge Level	Prerequisites	Advance Preparation	Release Date	Expiration Date	Delivery Method	
1	Accounting	Achieving Sustainable Continuous Improvement	2.2	Process improvement can be difficult to embrace within accounting and finance. The constantly evolving nature of finance and the uniqueness of each company's process requirements are factors that limit the effectiveness of standard process reengineering methods. Learn how to react to changes in ways that create opportunities for continuous improvement, compliance, change management, and cohesive and collaborative cross-departmental interaction. The results of these efforts lead to a transformed team that continuously improves its processes.	1. Recognize the ways habits significantly influence their reaction to change. 2. Identify the linkage between reactions to change from external sources to the way someone leverages the change. 3. Describe some techniques to create opportunities for continuous improvement, improved compliance, and proactive change management."	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study	
2	Accounting	An Introduction to Lean Accounting in Manufacturing Entities	2.0	As our society marches toward the fourth industrial revolution, the manufacturing industry is witnessing the rise of additive manufacturing, intelligent automation, and decentralized decision making. The high-volume mass production of the 20th Century will likely be replaced with medium- to low-volume customized production in the years to come. Consequently, accounting systems designed around overhead absorption and standard costing are becoming woefully inadequate to support the metrics-driven, value streamfocused, lean operating systems being embraced by the new manufacturing world. This session provides a manufacturing finance veteran's perspective on how lean accounting enhances fidelity and flow of information to drive continuous improvement in operations. It also explores some of the key system issues and cultural roadblocks that hinder widespread acceptance of lean accounting in modern manufacturing entities.	1. Outline an overview of what lean accounting is and how it's becoming increasingly important for manufacturing organizations in light of paradigm changes in technology. 2. Recognize ways that roles such as manufacturing controllers are shifting from being aggregators of financial data to being active business partners by providing timely and relevant financial information in a language that operational folks can understand. 3. Discuss some of the key scorecards and metrics associated with lean accounting.	Advanced	Work experience in a manufacturing environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study	
3	Accounting	Integrating a Compliance and Ethics Program with COSO's Internal Control-Integrated Framework	1.8	While many organizations have a compliance and ethics program to prevent and detect criminal conduct, some struggle to weave it into their culture to best protect themselves. A starting point is to thoroughly understand minimum requirements as defined in Chapter 8, Part B of the U.S. Sentencing Guidelines titled "Remediating Harm from Criminal Conduct, and Effective Compliance and Ethics Program," published by the U.S. Sentencing Commission. The guidelines provide incentives to organizations that follow a structural foundation to self-police their own conduct through an effective program and integrate the program requirements into a control framework that align with the cultural fabric of the organization. This session offers an integrated approach between the guidelines' requirements and COSO's Internal Control-Integrated Framework.	1. Define the seven minimum requirements for encouraging ethical conduct and demonstrating a commitment to legal compliance. 2. Identify and assess risks associated with implementing a compliance and ethics program. 3. Recognize COSO's Internal Control-Integrated Framework and its 17 principles to help ensure an effective compliance and ethics program. 4. Describe the list of topics from the recently published Fraud Section of the U.S. Department of Justice's Criminal Division.	Intermediate	Work experience in a professional staff environment or educational studies with exposure to COSO and/or internal control.	none	10/01/18	12/31/22	QAS Self-Study	
4	Accounting	Lease Accounting: The More You Know, the Better Prepared You'll Be	1.5	The new lease accounting standard changes everything about the way leases are accounted for. Its impact will be felt throughout the economy. Learn about the details of this new accounting standard, how it will change financial statements, and how to effectively negotiate leases in the future	1. Recognize the reasons why lease accounting was changed. 2. Identify the key features of the new lease accounting standard. 3. Explain the impact of the FASB's lease standard on lessees' and lessors' financial statements. 4. Recognize the importance of timely implementation of the new leasing standard.	Update	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
5	Accounting	Measuring Up Costing Solutions for Key Industries	1.8	Costing solutions for decision makers across industries have similarities and differences. This session focuses on how costing solutions can be used to improve decision making for operating efficiency and profitability. A panel of experts from the manufacturing, banking, healthcare, and professional services industries provide a detailed perspective on costing solutions. This session shifts to an engaging discussion on some common issues and solutions that allow management accountants to deliver innovative solutions to their company and grow as business partners and professionals.	1. Give examples of a range of costing solutions for the industries represented. 2. Explain a wider perspective of costing challenges, issues, principles, and solutions across a range of industries. 3. Identify differences in costing for decision support.	Intermediate	Work experience in a professional staff environment preferably in cost accounting or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study	
6	Accounting	On The Hunt? How to Value an Acquisition Target	1.5	This session provides an overview of business valuation and the due diligence process for acquisitions. Topics will include the quality of earnings assessment, the professionals and consultants involved in these transactions, the tax consequences of asset vs. stock purchases, and how to deal with complex capital structures and compensation issues such as restricted stock, stock options, and so forth. The session also explores the potential pitfalls of undervaluing or overvaluing the target, as well as the purchase price allocation for the auditors and IRS. Finally, IMA's Statement on Management Accounting, Business Valuation, and its relevance to this discipline are discussed.	1. Recognize the role of business valuation in the acquisition process. 2. Identify the checklists for C-level executives relating to business valuation. 3. Relate the appropriate standards to consider and follow in this discipline, including the use of professionals and consultants. 4. Describe the resulting tax and audit considerations once the deal closes.	Intermediate	Work experience in a business environment or educational studies in accounting, finance, business, or a related field with some exposure to M & A.	none	10/01/17	12/31/22	QAS Self-Study	
7	Accounting	Optimizing the Accounting Close and Financial Reporting	2.0	The constantly evolving nature of the business environment limits the effectiveness of standard process reengineering methods. Instead, an agile approach fuels the best path to continuous improvement success. This session discusses the methods successful companies have used to achieve more accurate, visible, faster, predictable, and continually improving results.	1. Recognize effective methods to improve performance and productivity within the accounting close and in other areas of finance. 2. Describe how to reduce the effort involved in the accounting close process by managing change proactively and incorporating continuous improvement. 3. Identify techniques for streamlining the closing process, creating an effective strategy while lowering project risk and making continuous improvement results sustainable.	Intermediate	Work experience in a business environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
8	Accounting	Presenting Financial Information: Talking about Dollars in Ways that Make Sense	2.0	Is your finance team wondering why its financial reports are not resonating with management and other leaders in the organization? In this session, learn how to identify information that's valued by various levels of management, how to present information in a compelling and easy-to-absorb manner, and how to continue to elevate management's level of understanding of the financial information critical to your organization's success.	1. Determine information relevant to their target audience. 2. Identify how to effectively communicate critical information 3. Understand how to continue to elevate their audience's level of understanding.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study	
9	Accounting	Reducing Length of Financial Close through SQL and Macros: What Every Accountant Should Know	1.5	Accounting departments in all organizations strive to achieve a more efficient close process. This session involves writing SQL (Structured Query Language) and creating macros that will reduce the amount of time to close the books. Through the discussion of real-life examples, attendees also learn a structured framework to implement reductions that create a more efficient close process.	1. Describe simple SQL statements to import data from their ERP. 2. Identify Excel macros used to automate account reconciliations and journal entries. 3. Identify bottlenecks in the financial closing process. 4. Summarize a plan to reduce financial closing time in an organization.	Intermediate	Work experience in a business environment or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study	
10	Accounting	Think Like A Thief	1.5	Fraud and embezzlement can wreak havoc on an organization's financial performance, not to mention the damage it can do to the organization's reputation. This session provides detection strategies and prevention tips based on actual cases. Be simultaneously educated and entertained during this fast-paced program designed for those with or without an accounting background.	1. Identify the conditions that fraudsters look for. 2. Define the 11 classic fraud schemes. 3. Recognize the conditions that an individual looks for to commit embezzlement. 4. Describe fraud and embezzlement prevention measures.	Intermediate	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	



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11	Accounting	Understanding and Implementing the New Lease Accounting Standard	2.0	Whatever we know about accounting for leases is about to change. In this session, the first comprehensive overhaul of the lease accounting standard in years is discussed. ASC 842, Leases, represents the second almost fully converged FASB/IFRS standard and is expected to bring almost all leases that have qualified under SFAS 13/ASC 840 as operating leases onto the balance sheet. The session reviews the changes that will come from these new rules, evaluates the impact on financial statements, and scopes out implementation challenges.	1. Describe the substantial change on leases caused by new focus on "Right of Use" assets and the resulting implications for both lessees and lessors. 2. Identify a spreadsheet showing finance and operating leases under the new lessee accounting model. 3. Evaluate the financial impact of bringing lease commitments onto the balance sheet. 4. Develop an implementation plan to scope out contract issues, systems challenges, data collection requirements, and enhanced disclosure needs.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study	
12	Auditing	Catch Me If You Can: Today's Pink-Collar Criminal	2.0	Everyone knows the term white-collar crime. Many people immediately think of Bernie Madoff or Charles Ponzi. But most people can't relate to those crimes. Unfortunately, they can recall a story of a long-term trusted employee embezzling from the local PTA, youth sports club, nonprofit, or even a local government agency. These embezzlers live among us. It's the position, not the gender, that makes it a pink-collar crime.	1. Describe the difference between white-collar crime and pink-collar crime. 2. Recognize why pink-collar crime is growing. 3. Identify who the "typical" pink-collar criminal is.	Intermediate	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	12/15/19	12/31/22	QAS Self-Study	
13	Auditing	Proper Audit Planning Advantages. Reduce the Pains and Fees!	1.5	This session explores ways to reduce audit fees and the time spent preparing for an audit. Through real-world examples from several companies, participants work through the planning process and learn how to spread out the time and effort to ease the audit process.	1. Identify ways to decrease the workload on your auditors, thus lessening their time spent and fees. 2. Recognize best practices from real-world companies on how to ensure "clean" audit reports. 3. Explain ideas and methods that will increase efficiency in your accounting department.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
14	Auditing	The Thief in Your Company	2.0	This forensic accountant has seen theft in many forms, but what sticks with her is the emotional devastation that these crimes leave in their wake. Using real stories of real frauds from her forensic accounting practice, participants learn that addressing fraud risk doesn't need to be complicated or costly. Unfortunately, most organizations are not looking in the right places or at the right people. In this informative and engaging session, learn how to decrease fraud risk and get back to doing what you do best: running your business.	1. Recognize characteristics of the typical fraudsters. 2. Identify specific steps to take if fraud is discovered. 3. Understand the emotional impacts of fraud. 4. Develop and implement a fraud response plan.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/15/19	12/31/22	QAS Self-Study	
15	Behavioral Ethics	Conflict of Interest at Midland Dairy: A Case Study	1.0	What happens when serving on the board of a nonprofit leads to issues at work? Join one of the authors of "Conflict of Interest at Midland Dairy," which won IMA's 2016 Best Case Award in the 10th annual Carl Menconi Case Writing Competition. This session compares and contrasts a corporate conflict of interest policy alongside the IMA Statement of Ethical Professional Practice. Can you imagine a situation in which you would unknowingly be in a conflict of interest? What happens when a conflict of interest leads you to discover a potential problem in your own company? Come and discuss this fictional case to practice your skills of ethical decision making.	1. Apply the IMA Statement of Ethical Professional Practice to a complex ethical dilemma. 2. Identify potential conflicts between a professional standard code of conduct and a company's conflict of interest policy. 3. Recognize and apply a company's conflict of interest policy to a context of volunteer work in the community. 4. Identify multiple ways to solve an ethical conflict and consider the consequences of each.	Intermediate	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
16	Behavioral Ethics	Diversity & Inclusion Jump-Start Kit	1.5	This session reviews IMA's Diversity & Inclusion Jump-Start Kit and how to strategically walk through the various components of the kit and utilize the information within to create a diversity and inclusion program at your respective organization. Attendees obtain a thorough understanding of what it takes to create a diversity and inclusion program, including best practices, how to identify where their organization is on the diversity and inclusion continuum, top 10 rules of engagement, potential obstacles, and sample reporting and metrics.	1. Define the basics of diversity, equity, and inclusion. 2. Determine if their organization is ready to implement a diversity, equity, and inclusion program. 3. Recognize how to integrate a diversity, equity, and inclusion program utilizing the Diversity & Inclusion Jump-Start Kit offered by IMA.	Basic	None	None	05/15/22	06/30/23	QAS Self-Study	
17	Behavioral Ethics	Ethical Decision Making: Right Choices in Today's Business Environment	1.5	Ethical issues are at the top of the list of things that can derail a career. This session provides a chance to pause and reflect on how we can learn to avoid ethical lapses and remain focused on doing the right things right in our organizations and in our dealings with others. Even if we're fortunate to work for a leader who sets the proper "tone at the top," chances are that we'll eventually encounter someone who doesn't adhere to high ethical standards. Our character and morals will be tested, and we must be prepared to respond promptly and decisively. By examining background information on ethics and character and explaining how ethics are more than right vs. wrong, this session challenges you to reflect on ethical situations both past and present and to apply the concepts discussed. Advanced preparation for ethical dilemmas is critical, and through exploring prior ethical dilemmas, this session prepares you to take the higher ground when ethical issues arise.	1. Recognize the importance of principles and values as a foundation for decision making. 2. Identify ethical decisions and recognize the ethical issues before responding to requests or taking action. 3. Describe ethical dilemmas and conflicts that result from rationalizing decisions.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
18	Behavioral Ethics	Exercising Your Moral Muscle	2.0	Most of us want to bring our "whole selves" to work. Yet many of us will encounter value conflicts in our careers, like when some of our personal values conflict with the expectations of clients, coworkers, bosses, and/or organizations. This interactive session is designed to help you build your "moral muscle" and better learn to recognize, clarify, speak, and act on your values when those conflicts arise.	1. Discuss what has enabled and prevented participants from speaking up in the past. 2. Identify how to reason through the most common and intractable rationalizations against ethical and responsible management. 3. Explore tactics to help you raise your voice when the occasion calls for it and overcome the common arguments to not be ethical "this time."	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
19	Behavioral Ethics	Tough Choices: Handling Ethical Issues in the Budgeting Process	1.6	Most ethics training focuses on either recognizing ethical issues or theories of ethical behavior. This session, instead, focuses on actions and arguments. Using the Giving Voice to Values approach to ethics, this discussion-focused session provides participants with opportunities to share ideas on dealing with ethical challenges in the budgeting process. Participants share some of the issues they've dealt with in practice, and the session introduces a specific case of budget ethics for general discussion.	1. Describe the ethical challenges common in the budgeting process. 2. Identify business responses to specific ethical scenarios faced while working through the budgeting process. 3. Recognize how to feel more comfortable dealing with ethical challenges in the accounting profession.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study	
20	Business Management and Organization	Corporate Governance and Internal Controls: Effective Risk Management	1.8	The corporate governance and internal control structure may be your best friend or your worst nightmare, depending upon your roles, responsibilities, and willingness to adhere to delegated authority guidelines. Each of us must focus on doing things right, striking the appropriate balance of controls, compliance, and authority to execute the business strategy and achieve the objectives of the organization while effectively managing risk. There are many gray areas concerning compliance, and we must build a network of advisors and mentors to ensure that the best decisions are made, realizing that the decisions must fit the culture and are reviewed with the benefit of hindsight.	1. Recognize best practices in corporate governance. 2. Describe issues in governance and control and incorporate these items in the decision-making process. 3. Discuss how one can become an "effective gatekeeper" while managing risk and reducing the potential for a future lapse in corporate governance.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	09/15/20	12/31/22	QAS Self-Study	
21	Business Management and Organization	Lessons from the Beer Industry: Succeeding in a Competitive Mature Market	2.0	The beer industry, both globally and nationally, is going through a period of rapid change and upheaval. Massive consolidations have made international news, while at the same time the number of breweries in the U.S. has greatly increased due to the craft beer boom. At the same time, however, the overall market for beer has been declining at a slow and steady rate for years due to increased competition from wine and spirits, and the changing social habits of Millennials. As a result, brewers, distributors, and retailers are facing complexities and challenges like never before. This session gives background on the current beer industry and explains how companies competing within it are driving profitability even in the face of a declining and increasingly challenging market.	1. Describe today's dynamic global and national beer market. 2. Identify strategies to succeed in a complex and declining market. 3. Explain how the role of the management accountant can provide resources and expertise to an organization's leadership to successfully facilitate change."	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study	



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22	Business Management and Organization	Linking Strategic Plans to Quality and Lean Systems 50-50-20	1.6	Join this hands-on session and learn how to effectively develop an aligned Quality and Lean Management Systems (QLMS) plan by transforming business strategies into agile, tactical actions with supporting KPIs. This proven method has been used successfully by many different types of organizations. Participants create and take home working samples relevant to their unique business environment. Professionals see how they can visualize, articulate, and execute a plan to meet their QLMS goals and objectives via Hoshin Kanri and supporting system tools.	1. Identify how to visualize, articulate, and execute a plan to meet organizational goals and objectives. 2. Describe an approach for tailoring a plan to meet business needs. 3. Recognize some examples of best practices of using tools and techniques that have effectively served multiple organization types. 4. Discuss a Lean Six Sigma approach that enables cross-functional team alignment both horizontally and vertically.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	12/15/19	12/31/22	QAS Self-Study
23	Communications and Marketing	Social Media, You and Your Company	2.0	Social media is widely used in today's professional setting from both a company and individual perspective. This session explores the benefits of different social media platforms. Learn quick ways that social media can work for you and your company, saving you time and money. In addition, gain a better understanding of what your social media image says about you. Make social media work to create a positive brand for you.	1. Distinguish how to make an educated decision on what social media platforms work best for them. 2. Identify three quick ways to produce social media content. 3. Discover established and emerging social media such as Facebook, Twitter, Glassdoor, and more	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study
24	Computer Software & Application	From the Mainframe to the Blockchain: The Triple Entry Has Arrived	2.0	Blockchain technology is a decentralized, shared ledger of financial transactions. Composed of separate blocks (i.e., transaction batches) formed in a continuous, sequential chain, this data structure enables multiple users to share information through a distributed computer network. The globally distributed ledger, run on multiple devices and open to anyone, will redefine how companies store data and transact business on a local or global scale. In addition to financial and governmental sectors, other diverse industries such as music, farming, and retail are leveraging blockchain-based platforms. This session helps management accountants rethink traditional accounting and finance models and the transformative benefits of using blockchain technology to conduct financial activities.	1. Describe the underlying framework of blockchain technology and distinguish between a public vs. private network. 2. Identify key industries and emerging markets utilizing blockchain technology. 3. Explain the benefits of integrating this technology with existing auditing, banking, and data security systems."	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study
25	Computer Software & Application	Get Your Tech On - Technology Trends to Watch	2.0	Striking a balance between working with your existing technologies and planning for future ones can be challenging. It's vital, however, that you understand technology trends and how they impact your role within your organization. This session reviews technologies such as Blockchain, artificial intelligence, inline XBRL, the Internet of Things, and more!	1. Identify top technology trends to watch for management accountants. 2. Understand how technology might impact management accounting roles and responsibilities. 3. Describe challenges and opportunities around top tech trends for management accountants. 4. Know where to find additional information about top tech trends from IMA.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study
26	Finance	12 Principles of Best Practice FP&A	1.0	FP&A (financial planning and analysis) is the primary vehicle for Finance to engage with the business. Join us as Lawrence Servern, of BDO&D International, reveals IMA research from more than 700 institutions worldwide and the resulting 12 principles of best practice FP&A. He will explain what best-in-class companies are doing differently with FP&A, and how you can apply these principles to achieve the status of trusted advisor and partner within your organization.	1. Explain FP&A as a decision-making platform. 2. Name the 12 principles of best practice FP&A and be prepared to evaluate your own FP&A environment accordingly. 3. State the implications of the 12 principles on training and development. 4. Identify the implications on technology enablers given the 12 principles.	Intermediate	Work experience in a professional studies in accounting, business, or a related field.	none	06/01/18	12/31/22	QAS Self-Study
27	Finance	Be a Strategic Partner on Pricing	2.0	Pricing decisions provide a great opportunity for finance professionals to partner with nonfinance business leaders on issues that have a substantial profit impact. In this session, learn a simple framework for evaluating price decisions and look at several questions that can be asked during price discussions to steer your company toward sound pricing practices while using the framework. Understand how management accountants can grow into a more strategic role by bringing structure, facts, and objectivity to complex price decisions. You can be the one to challenge traditional and often inadequate views of pricing.	1. Evaluate and improve a price strategy. 2. Identify and execute price-related profit opportunities. 3. Recognize how to become effective business partners on strategic pricing.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/15/19	12/31/22	QAS Self-Study
28	Finance	Demystifying Advanced Costing Techniques	1.5	This session uses case studies and real-world examples to discuss a variety of advanced costing techniques to use in a number of costing scenarios. Owners, CFOs, controllers, and more can learn how to unravel complex problems, including determining the cost of the same or similar lines and processes, how to identify what is overhead and what can be broken down into assignable costs, and tools to assist in an assortment of costing problems.	1. Determine what a reasonable goal should be for nonspecifically identified overhead. 2. Recognize how to handle complex costing issues to provide the most accurate and transparent information possible. 3. Identify the tools and techniques to assist in several advanced costing issues.	Advanced	Work experience in a professional staff environment preferably in cost accounting or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study
29	Finance	Drive Action via Effective Management Reporting	1.5	What's the key to quickly and effectively identifying the three "go-do's" of any managerial report? Finance professionals spend a great deal of time aggregating financial data for presentation to management—they love to get their hands dirty in the math. They're never more proud than when they show up with a three-inch binder full of every answer to any question. What they most often miss, however, is "connection": how to effectively communicate to the managerial races—those who are purely wired for forward motion—which way to the finish line, and how best to get there in a hurry.	1. Explain how to identify the three "go-do" messages in any report. 2. Describe how to prioritize messaging in managerial reporting to best effect change and drive behavior. 3. Recognize the importance of making a "connection" between the data in reports and the end goal.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study
30	Finance	Innovative Budgeting Approaches: Lessons from CFOs	1.6	Almost every accounting and finance professional has been involved with the budgeting process. Traditional budgeting has many challenges, including inefficiency and ineffectiveness. Some companies have started to successfully adapt innovative budgeting approaches to manage their businesses more dynamically. Several use cases of executives who decided to drop budgets or change their approach are discussed. The speakers provide insights into the executives' motivations, decisions, and the shifts needed for finance organizations to become more agile. Drawing upon these experiences and lessons learned, attendees gain practical guidance on how to adapt and improve budgeting within their companies.	1. Describe the relevant functions of budgeting and its linkage to strategic objectives. 2. Identify examples of and reasons for companies that have successfully changed their budgeting approach. 3. Recognize lessons learned and derive practical insights for the budgeting process in a company.	Basic	None	None	03/15/22	06/30/23	QAS Self-Study
31	Finance	Navigating Buy-Side or Sell-Side Financial and Tax Due Diligence	2.1	In this session, hear a seasoned transaction advisory services professional describe the due diligence process, from both a buy-side and sell-side perspective. Gain valuable insights into the "quality of earnings" analysis, net working-capital settlement negotiations, and business analytics performed during due diligence. Common tax due diligence findings are discussed, and participants learn about best practices when negotiating a purchase agreement.	1. Explain the due diligence process if considering an acquisition or sale. 2. Describe best practices when negotiating a purchase agreement. 3. Recognize the need for external assistance to help navigate the process to a quick and efficient closing.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study
32	Finance	Predicting Trends and Driving Insights Through Analysis: a Continuous Evolution	2.0	The demands on financial professionals are greater than ever, and long gone are the days when simply "reporting the numbers" satisfied management's need for information. The management accountant of today should not only report and analyze financial information but be able to predict trends and help direct their organizations to capitalize on these important trends. This session discusses developments in computing and data management, tools and techniques of analysis, and emerging technologies that help drive deeper insights and improve decision making.	1. Describe the spectrum of analysis, from basic financial and operational reporting through cognitive analysis, that can be used to drive an organization. 2. Explain the framework to leverage that analytical spectrum. 3. Identify the key attributes and potential actions to help advance one's organization as well as professional skills leveraging this spectrum.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study
33	Finance	Successful Strategic Execution Begins with Long-Range Financial Modeling	1.5	Developing long-range financial plans that will successfully inform senior team strategic execution decisions requires a whole lot of initiative and critical thinking. The objective is to help solve the organization's greatest financial challenges. Yet, complexity hinders the discovery necessary for insight. This session describes how the publisher of the world's oldest continuously published medical journal harmonizes the top-down and bottom-up of long-range planning with collaborative processes and technology-enabled simulation modeling	1. Describe the ways in which the management accountant can support strategic execution. 2. Define the collaborative processes that will ensure successful implementation. 3. Recognize the importance of technology-enabled modeling to decision support	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study



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Course #	Field of Study	Title	CPE Credit	Product Description	Learning Objectives	Knowledge Level	Prerequisites	Advance Preparation	Release Date	Expiration Date	Delivery Method
34	Information Technology	Blockchain & Data Concepts for Accountants	2.0	Look beyond the hype and confusion surrounding blockchain and Inline XBRL. In this presentation, Daniel Smith gives a step-by-step demonstration of real-world applications using both technologies. Attendees see actual Inline XBRL tags and how they are used to define online financial metrics, as well as easy-to-understand examples of how blockchain smart contracts and ledgers provide new ways to update, control, and audit data.	1. Identify at least one real-world application for blockchain. 2. Explain basic XBRL and Inline XBRL structure. 3. Summarize the difference between blockchain technology and traditional data management systems.	Intermediate	Work experience in a professional business environment, or educational studies in accounting, business, or a related field, with a basic understanding of technological advancements in business.	none	11/15/20	12/31/22	QAS Self-Study
35	Information Technology	Breaking Down CBDCs—The Next Stage in Crypto Development	1.6	This session breaks down and analyzes what is arguably the most important development in the cryptoasset space since the development of bitcoin itself. Central bank digital currencies (CBDCs) have been in the cryptoasset conversation for several years but have recently come to the forefront as institutions and individuals seek to use crypto as a legitimate fiat alternative. Attendees will learn what digital currencies are, how CBDC is different from other cryptoassets, trends in the CBDC space, and implementation considerations. There are some accounting and assurance issues that such a cryptoasset could create, such as how to value, report, and disclose the information connected to a CBDC.	1. Recognize how stablecoins, including CBDCs, function and connect to accounting and cryptocurrency accounting topics, including securing and safeguarding stablecoin information. 2. List the core attributes of CBDCs and describe how these cryptoassets function and operate compared to existing cryptocurrencies and fiat currencies. 3. Give examples of how different cryptoassets operate and how they engage with the rest of the accounting and financial services space.	Intermediate	Work experience in a professional staff environment or educational studies in accounting, business, or a related field. Basic understanding of technological advancements and their risks in business.	None	02/15/22	06/30/23	QAS Self-Study
36	Information Technology	Bringing IT and Finance Together: Data Governance and Visualization	1.8	Maintaining data integrity, minimizing downside risk, and maximizing profit is a team effort. How can finance and IT departments work together toward common objectives? This session provides techniques to actively manage conflict and align offensive and defensive data strategies with corporate strategy. This session also discusses a mature model of data governance that balances the needs of both finance and IT throughout the data life cycle. Learn key concepts for telling your corporate story with data and maximize your role by communicating effectively and efficiently.	1. Identify the top internal roadblocks to building a data-driven strategy. 2. Explain how IT and finance can collaborate to rightsize and optimize a data governance framework. 3. Describe the importance of effective storytelling and communicating facts with data.	Basic	None	None	04/15/22	06/30/23	QAS Self-Study
37	Information Technology	Cyber Attack Alert! Top 6 things Businesses Should be Doing, but Aren't!	2.0	There are two types of companies in the world: those that have been hacked and those that don't know they have been hacked. How does a company protect itself when it doesn't even know it's under attack? Discover how to manage the challenge of protecting a business, including your employees and confidential business information, as well as your own private information. Learn actionable items you can do today to manage the security of information, decrease the risk, and manage the "human factor" of information security.	1. Identify why criminals are hacking into businesses. 2. Estimate the reported losses of cybercrime. 3. Explain how data breaches happen and how to avoid being unintentional accomplices of cybercriminals. 4. Identify tips, tricks, tactics, and behaviors to spot phishing attacks, be prepared when an incident occurs, and increase awareness to protect yourself and your business.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study
38	Information Technology	Cyber Fraud, Cybersecurity, and Cryptocurrencies in 2019: How to Protect Your Business	2.5	Learn what's going on in the world of cyber fraud, cybersecurity, and cryptocurrencies—three of the hottest topics in business discussions today. The session explores some of the newest cyber fraud schemes as well as an introduction to cryptocurrencies and how they are utilized in cyber fraud schemes. The session also focuses on ways to secure your business operations from cyber fraud and improve your cybersecurity.	1. Describe current cyber fraud schemes directed at businesses and individuals. 2. Demonstrate a basic understanding of cryptocurrency and its role in cyber fraud schemes. 3. Identify specific action items to improve your personal and business cybersecurity.	Intermediate	Basic understanding of technological advancements and their risks in business.	none	06/15/20	12/31/22	QAS Self-Study
39	Information Technology	Data Visualizations: The Good, the Bad, and the Ugly—How to Create Good Visualizations	2.0	Data visualization can be a very powerful tool to analyze data as well as explain analysis results. The increased accessibility of data visualization tools (Excel, Power BI, Tableau, and so on) has led to an increase in the use of data visualizations in business. There is often, however, very little training as to what constitutes a "good" visualization. The risk of making suboptimal decisions based on incorrect or misleading visualizations is very real. This session identifies best practices of creating visualizations, identifies common decision-making biases, and discusses ways to identify a misleading or incorrect visualization.	1. Describe best practices for creating visualizations. 2. Identify common decision-making biases and how they apply to the creation and use of data visualizations. 3. Differentiate between correct and misleading visualizations. 4. Summarize ways management accountants can create insightful data visualizations and avoid decisionmaking biases.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/15/19	12/31/22	QAS Self-Study
40	Information Technology	Demystifying Robotic Process Automation (RPA)	1.6	Robotic process automation (RPA) is transforming the way organizations approach finance and accounting processes. User-friendly platforms along with embedding or integrating advanced digital services such as artificial intelligence and machine learning make RPA an accessible option for companies—the majority of which begin implementation with finance and accounting processes. Boasting end user development functionality that requires little to no IT expertise, RPA should be on each finance and accounting professional's radar. This session provides a detailed look into RPA technology, its impact on our profession, keys to scaling RPA, and how we can become leaders in this space.	1. Define RPA. 2. Explain the impact of RPA on the finance and accounting profession. 3. State how both small businesses and large enterprises can leverage RPA. 4. List actions finance and accounting professionals can take to realize benefits from RPA.	Basic	Basic understanding of technological advancements in business	None	12/15/21	06/30/23	QAS Self-Study
41	Information Technology	Excel Tips and Tricks for the Nonpower User	2.0	Learn tips and tricks to make Excel easier and more fun to use. From keyboard shortcuts to customizing Excel in simple ways to make themselves better and faster at everyday tasks, attendees leave with tips and tricks that they can apply immediately at work.	1. Identify tips and tricks for making Excel easier and more fun to use. 2. Recognize how to customize Excel in simple ways to make everyday tasks easier. 3. Recall shortcuts that they can apply immediately at work.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	12/15/20	12/31/22	QAS Self-Study
42	Information Technology	Modern Excel and Power BI: Proven, Practical Revolution	2.1	In the world of data, the data itself can be considered noise, but the story it tells is extremely valuable. Much more time is spent cleaning and preparing data than is spent analyzing it to help decision makers improve the business. This session shows how the ratio between time allotted for data preparation and performing the analysis has improved. It provides an example of how better analytics have been used in finance and how they can be used in other areas. Attendees will learn how to take data from raw enterprise resource planning systems, on three different continents and with six different currencies, while barely making reporting deadlines. Learn what drove this incredible transformation in financial planning and analysis teams and about some experiences in delivering these kinds of transformations.	1. Describe some ways to improve the ratio of the time needed for data preparation vs. analysis. 2. Identify how management accountants can utilize data science and developer tools effectively and with minimal capital investment. 3. Recognize ways to implement tools learned in their own organization to become business insight providers and partners.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study
43	Management Services	Business Value - Creation and Realization	1.5	At some point during the life cycle of a business, owners must consider two critical issues: Are we creating a valuable enterprise and how do we access the value that we have created? Many business owners have misconceptions regarding what constitutes a valuable enterprise, how that value is created and the process through which owners have the best options to realize that value. This session addresses these issues and offers strategies that business owners and their advisors can implement in order to create and, ultimately, realize the value of the business.	1. Define value and how it means more than profit or positive cash flow. 2. Identify the best options to create business value. 3. Recognize the best options to realize business value.	Intermediate	Work experience in a professional business environment or educational studies with exposure to strategic concepts.	none	10/01/17	12/31/22	QAS Self-Study
44	Management Services	Dashboards -- Selecting and Using KPI's Effectively	1.8	Selecting the best key performance indicators (KPIs) to analyze a business is essential for success. In this session, attendees are provided with a methodology to understand and accelerate the selection of KPIs to assess their organizations effectively. Three levels of metrics—C-suite, key stakeholders, and operations, each with differing requirements—are introduced, and alternative measurements are encouraged as a basis for consideration. The session also includes a discussion of the common challenges of measuring KPIs and the importance of establishing key linkages between enterprise-wide drivers, organizational strategy, and key initiatives.	1. Identify three KPI audiences and how their level of interest determines the approach and selection of KPIs. 2. Recognize that KPIs are aligned with key stakeholders or operating teams. 3. Describe world-class performance and distinguish between world-class and peer performance.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study
45	Management Services	Make Budgets Great Again with Vivid Lean Design	2.0	Conventional budgeting often leads to apparent successes that aren't justified when examined in operational context. When presented with complex, nuanced results, human nature will gravitate to the first available financial win, despite any intellectual awareness of confirmation bias. Statistics can demonstrate that even the most modest amounts of process bias will dramatically damage the chances that financial performance targets are met. Lean budget processes can greatly improve results interpretation, increase customer satisfaction, and create a process that's easier to build and maintain. Volume-normalized ratios convey intelligence accurately and intuitively with vivid graphic formats.	1. Describe common budget flaws and variance interpretation errors. 2. Identify lean principles and their application to the budgeting process. 3. Recognize the analytical strength of volume-normalized ratios.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study

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46	Management Services	Making Results Count: Using Relevant Results Measurement to Align Execution with Strategy	1.5	The annual planning cycle starts with the development of the strategic plan, followed by target setting and the selection of initiatives to operationalize the plan. Through the process, there is little focus on whether the existing KPIs are relevant. Successful businesses strive to align execution with strategy through a solid understanding of results, causality, and active monitoring of the pertinent action drivers. In this interactive session, learn how to attain results clarity from strategy statements, articulate useful KPIs, and build a measurement framework that enhances performance and accelerates results.	1. Describe the linkage between strategy, results, and execution to improve the decision making related to initiatives selection. 2. Identify a powerful technique to critique and develop meaningful KPIs. 3. Explain ways to improve performance with an effective performance measurement framework.	Advanced	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
47	Management Services	Measuring and Managing Customer Profitability	2.0	Customers are the source of financial value to increase shareholder value. But the sales volume from high-demanding customers isn't always proportional to the profit margin they provide to a company because they often require more resources, resulting in higher expenses. Unfortunately, many managerial accounting systems aren't able to report accurate customer profitability information to support analysis for placing customers into the retain, grow, or win back categories, as well as which types of new customers to acquire. This session explores the path to improving a cost system to identify problematic, profitable, and valuable customers. Participants also discuss support decisions that lead to increased and sustainable profitability.	1. Identify problematic customers and understand how they can drag down overall profit margins. 2. Distinguish between a valuable customer and a profitable one. 3. Recognize the corrective actions managers and employees should take to increase the profit of a customer.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study	
48	Management Services	Passive vs. Active Investing: Impact to Investor Relations	1.8	This seminar explores how the role of investor relations is changing with the rise of index investing. Index (or passive) investing involves a money manager purchasing a basket of securities designed to mimic the returns of a market index such as the S&P 500 or Russell 3000. This differs from traditional or active investing in which portfolio managers proactively buy, sell, and monitor specific securities to take advantage of profitable conditions. Today, passive investing is growing and accounts for 30% of all U.S. money management. This growing type of money management involves new ways of communicating with investors and requires company directors who are able to explain governance policies on board refreshment, compensation, and sustainability. As such, it is important for firms participating in passive investing to ensure clear disclosures to their investors	1. Explain how passive investors differ from active investors. 2. Identify three key concerns of passive investors. 3. Define the impact of passive investing on the investor relations role. 4. Recognize ways their firms may better communicate with passive investors.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study	
49	Management Services	Putting the Business at your Fingertips: Seamless Operational and Financial Reporting	2.0	What happens when you put a CMA* in charge of an ERP implementation for a \$20 million company? Explore a real case study, as told by the project manager, by discussing familiar ERP implementation groundwork such as technology selection, business process mapping, business strategy support, and implementation-team dynamics. Dive into specific Sequel Query Language (SQL) database tables, queries, business intelligence reporting tools, KPIs, and tricks to keep the sales reports in lockstep with income statements.	1. Explain how to apply lessons learned from a successful ERP implementation to your own company's project. 2. Identify how limited SQL query writing skills can be used in writing an enterprise-wide, mission-critical business reporting application. 3. Describe behaviors that create competitive advantage by giving managers the reports they request—reconciled to the business KPIs.	Intermediate	Work experience in a professional business environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
50	Management Services	Reimagining the Role of Management Accountants	1.4	Michael High, Royal Dutch Shell's business unit CFO, and Russell Porter, IBM's vice president of finance and planning, discuss the evolving role of the senior finance and accounting professional in organizations based on their robust leadership experiences. Now more than ever, CMAs and management accounting leaders are expected to leverage new technology and adapt to new uncertainties. These two experts explore thought-provoking topics such as leading and managing teams, business transformation, risk management, and how to be a strategic partner in your organization.	1. Discuss the evolving role of the finance and accounting function. 2. Identify critical skill sets required to navigate uncertain times. 3. Recognize how to become a strategic partner for their organization.	Intermediate	Work experience in a professional business environment, or educational studies in accounting, business, or a related field, with a basic understanding of technological advancements in business.	None	01/15/22	06/30/23	QAS Self-Study	
51	Management Services	Small Business Competitive Advantage—Lurk, Lunge, and Chomp	2.0	Alligators have a simple strategy for success: lurk, lunge, and chomp. Participants learn how to apply this simple strategy for more successful decision making in their organization. Roy Austin presents with humor, stories, and unique graphics as he shares the basics for successful decision making in the business swamp—all based on his extensive experience with for-profit and nonprofit organizations of all sizes and types. Succeeding in the business swamp is a challenge, but there are basic principles that greatly improve the odds of success. For his book, The Alligator Business Solution: Small Business Competitive Advantage, Roy interviewed 36 successful businesses, and their stories, as well as a few horror stories, are presented in this session. Although his book is designed to improve small business success, the principles presented in the book and this session are applicable to every size and type of organization.	1. Define a solid foundation for their organization. 2. Recognize how to align all business functions with that foundation. 3. Demonstrate how to improve decision making for a competitive advantage.	Basic	N/A	none	10/15/20	12/31/22	QAS Self-Study	
52	Management Services	Transforming Team Finance: A Case Study	1.9	Expectations for the finance team are changing daily. Continuous improvement is an absolute imperative, and technology has removed distance barriers between employer and employee. How do we transform team members into more effective business partners? How do we manage the change required in such a transformation? This session, introduces a model for continuously improving the efficiency and effectiveness of the finance team by using a case study.	1. Identify opportunities for the continuous improvement of their finance team. 2. Analyze alternatives and select the best approach to improve a team's effectiveness and efficiency. 3. Leverage change management to effectively transform a team. 4. Apply monitoring techniques to assess the results of a team's transformation, ensuring expected results are achieved."	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study	
53	Personal Development	Anticipate Change: Avoiding Ulcers in the New Abnormal World	2.0	This workshop gives attendees a proven set of tools to manage others through change and better handle the changes in their work and personal lives. The overall goal is an adaptable, resilient workforce that is comfortable with continuous change and a personal style of behavioral flexibility. Specific case studies reinforce the learning objectives.	1. Identify the four steps of processing change. 2. Define at-risk personality traits as they relate to change resistance. 3. Recognize techniques for managing personal transition.	Intermediate	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	03/15/20	12/31/22	QAS Self-Study	
54	Personal Development	Are You a Strategic Partner in Your Organization? Management Accountants Evolve!	1.0	"Management accountant" is rarely used as a job title in most organizations. Yet so many professionals, with a variety of titles, are involved in management accounting. Nevertheless, the word "accountant" too often creates a boundary around the work and the potential value of a management accounting professional. There's a significant gap between the current value of management accounting professionals and the value that could be delivered. It's both a "demand and supply" opportunity. This session explores a larger landscape of contribution to bring to the strategic work in an organization and gives you an opportunity to personally consider what you already know.	1. Summarize the contributions you can and should be making in your organization. 2. Recognize and expand your core strategic, risk management, and finance skills. 3. Identify how you can develop your personal abilities in leadership, conflict resolution, and change management.	Advanced	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
55	Personal Development	Balancing Leadership and Likeability		Do you worry that if you appear powerful with your team that you will face backlash or be unpopular in the office? Do you often feel that you must sacrifice relationships to get results? Many leaders, both new and experienced, struggle to find the balance between building relationships with their teams and providing the leadership rigor needed to generate results. This session identifies two different styles of leadership—creative and reactive—and the impact each has on your effectiveness as a leader. It then explores what is driving the desire to be liked by your team and teaches ways to be a powerful leader while building and maintaining relationships.	1. Identify and recognize reactive and creative leadership styles 2. Discover what drives leadership behavior and the desire to be liked. 3. Recognize the blind spots that get in the way of effective leadership 4. Create an action plan for implementing more powerful and effective leadership with your team.	Intermediate	None	None	03/15/22	06/30/23	QAS Self-Study	
56	Personal Development	Become an Effective Communicator By Breaking the Golden Rule	2.0	Everyone has different personalities, temperaments, and preferred styles of communicating, each with their own "language" when it comes to communication style and preference. Understanding someone's communication style is the key to great communication with the people you work and live with. This interactive presentation explains the four main communication styles and how to work with each one. Participants learn key phrases and tips that will aid in becoming a more successful communicator and reduce misunderstandings and conflict.	1. Discover the four types of personal communication styles. 2. Recognize how to communicate with different communication types. 3. Identify the key phrases that will allow positive communication and reduce conflict.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	05/15/20	12/31/22	QAS Self-Study	



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57	Personal Development	Building a Positive Culture: Why Happiness Matters	1.6	In this interactive program, learn how to bring the science of happiness and positive psychology into the workplace to help leaders create organizations that respect and engage people, resulting in optimal productivity. In addition to understanding the financial impact of positive culture and how fostering happiness in your employees can improve your bottom line, learn several simple yet powerful personal practices to embody positive leadership and change your presence at work—practices more important than ever in a virtual world.	1. Discover the financial impact of positivity in the workplace and how fostering happiness in employees can improve the bottom line, as measured by existing metrics. 2. Propose happiness as an agenda item equal in impact to revenue and profit—because, in an era of instant access to infinite data, the only thing that differentiates any organization from the competition is its people. 3. Demonstrate appreciation and happiness across the whole system—from hire to fire—weaving it into the operational fabric of their organizations. 4. Embody happiness themselves through intentional leadership actions that are simple yet powerful.	Overview	Work experience in a professional business environment	None	01/15/22	06/30/23	QAS Self-Study	
58	Personal Development	Creating Financially Savvy Partners—How (and Why) to Train Nonfinancial Managers	1.8	This session focuses on how management accountants can help their nonfinancial cross-functional colleagues build a basic financial understanding and skill set. This would help an organization's sales, operation, HR, and IT departments make better financial decisions, saving the finance team time and energy and creating strong business partners. Ultimately, this session can help your partners positively impact the financial returns of your business. This is a pragmatic, application-focused session to help you improve the effectiveness of your multifunctional team—starting today!	1. Recognize the business imperative of teaching basic financial skills to all nonfinancial business partners. 2. Identify the do's (and don'ts) of teaching finance to nonaccountants. 3. Produce at least three concepts that can immediately improve cross-functional teams' operations and results.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study	
59	Personal Development	Digital Dependency, Detox, and Discernment for Accounting Professionals	1.5	This session details the extensive use of personal technology by accounting professionals and includes exercises in working with "FOMO" (fear of missing out) and going screenless. The session uses contemplative best practices to explore participants' relationships with personal media and technology. Discover strategies for managing digital dependency, information overload, and attention deficit in a management accounting context.	1. Describe the evolving social and cultural practices of personal technologies. 2. Discuss strategies for using personal technology wisely in a professional accounting setting. 3. Identify how to build functional, personal, and organizational relationships with personal technologies.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
60	Personal Development	How to Leverage the Power of Persuasion and Influence to Win in the Workplace	2.0	When most people think of sales, they think of a slimy car salesman or a telemarketer. People forget that they sell themselves in their everyday lives. If you're a mother trying to convince your kids to eat their vegetables, or a person walking into an interview for the career of your dreams, or even a manager trying to communicate effectively with your employees, you are selling yourself. Replace the word selling with persuasiveness, likeability, engagement, or influence. Are these words that you think would help you win in the workplace? This session explores why effective selling and personal development techniques can lead to optimal success in the workplace, even for accountants. Participate in interactive exercises and learn valuable and innovative techniques that will increase your persuasiveness and influence in the workplace.	1. Recognize why selling is not a niche, but a vital component of everyday success. 2. Identify how to apply effective selling in the workplace. 3. Demonstrate ways to bring the best seller out of all of us	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/15/19	12/31/22	QAS Self-Study	
61	Personal Development	Leadership During Times of Change	1.5	During a change management initiative, one common mistake is to assume that alignment and productivity result predictably from careful planning. In practice, most change management initiatives fail, and most commonly fail because the human beings involved were not fully considered. But what the heck does that have to do with a session on leadership? The most critical component in business today is leadership, and the rubber meets the road when you're the one responsible for bringing a new structure, approach, team, or an entire acquired organization into an existing environment. This session helps to identify the pitfalls of how traditional financial models view human capital, helps to define the business reasons to evaluate culture through the financial impacts of cultural differences, and provides the right questions to ask when your task is to lead through business integration and change management. You can measure financial performance quarter after quarter, but the true measure is looking at organizational health—and that measure doesn't exist without leadership.	1. Identify the pitfalls of how traditional financial models view human capital. 2. Define the business reasons to evaluate culture. 3. Recognize the right questions to ask when leading through change management and business integration to ensure employee retention, engagement, and effective communication.	Intermediate	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
62	Personal Development	Leadership Military Principles Applied: Lessons Learned from Iraq/Afghanistan to the White House	1.6	Derren Burrell (selected for colonel before leaving for TAG Resources, LLC) uses his 21 years of military service and, in particular, his numerous deployments, to disseminate major leadership principles applied in military operations and how they can apply to any high-performing organization. If your firm is facing dynamic, high-intensity, high-stress environments that are constantly changing, you can use the principles taught in this workshop on your own battlefield.	1. Explain proactive, rather than reactive, leadership techniques. 2. Identify potential "land mines" and how to deal with internal and external forces. 3. Discover ways to solve problems in a systematic, repeatable manner.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/18	12/31/22	QAS Self-Study	
63	Personal Development	Setting the Tone at the Top: To Lead Tomorrow, Prepare Today	1.5	Leaders lead people and set the tone from the top of their organizations. The phrase "tone at the top" is often associated with ethics, honesty, culture, audit roles, and governance. But tone at the top has a much broader and deeper meaning for true corporate leaders. It has been said that many have the title of "leader," but few earn the right to be called a "leader." This session focuses on leadership in the context of the modern corporation: A leader's ability to lead can restrict the corporation's success since good leadership can enable increased results.	1. Describe and assess leadership skills by understanding the actions and thinking of other leaders. 2. Identify opportunities for personal improvement that, when addressed, can create future leadership opportunities. 3. Recognize what to learn from modern-day leaders and personal lessons shared. 4. Identify how to create a plan for personal improvement.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
64	Personal Development	The Infinite Possibilities of Your Innovation	2.0	The innovator's mind is curious, bold, and always working. It is also inside all of us, but not everyone innovates the same way. And while innovation has become an organizational mandate and critical job description, we expect innovation to be accomplished somehow in the same institutionalized way, which shuts out 99% of your people. We then wonder why fresh ideas never get created, or, when they do surface, why they are never implemented. Tamara Kleinberg's proprietary Innovation Quotient Edge (IQE) assessment engages the nine key triggers of innovation to identify and leverage your untapped potential. The only assessment that can quantify how you innovate will show you how understanding Unique Innovation Profiles, especially your own IQE, will help your team discover how to work smart and bring more innovative thinking to work and life.	1. Identify how to avoid the innovation pitfalls of exclusivity and siloing that kill morale, performance, and results for most organizations and within most people. 2. Discover their greatest untapped asset—their innovation Profile—and be themselves, at their best. 3. Recognize how to engage their peak performance and deliver more innovative thinking to their work and life. 4. Create an environment where everyone on their team has permission to innovate and deliver their best performance.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study	
65	Personal Development	What Got You Here Won't Get You There—The Anticipatory Leader	1.7	Recent research predicts that the business environment will be characterized by "unprecedented, massive, and highly accelerated change" through 2025. To thrive in this new age of hyper change and growing uncertainty, it's now an imperative to learn a new competency—how to accurately anticipate the future. This session shows how to anticipate these trends and move from being a crisis manager to an opportunity manager. Participants set actionable steps to elevate and accelerate their organization's strategy.	1. Identify the major trends shaping business today. 2. Cite examples of disruptive trends. 3. Categorize trends into predictable hard trends and soft trends. 4. Recognize how to incorporate trends to use in organizational strategy.	Intermediate	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	11/01/18	12/31/22	QAS Self-Study	
66	Personnel/HR	#UsToo: The B.R.I.D.G.E. to Closing the Global Gender Gap—Together!	1.8	International best-selling author Debjani Biswas launched the #UsToo initiative so that women and men can work together to bridge the global gender gap. As a female engineer, she has unique and authentic insights into practical steps toward this goal. We can achieve this B.R.I.D.G.E. by building and reinforcing inclusion while destroying the guardrails of exclusion. • Building and Reinforcing Inclusion. • Destroying the Guardrails of Exclusion. #UsToo points to a path that leverages emotional intelligence, industry best practices, and actionable tools. This engaging, multimedia session inspires professionals to take steps towards increased equity—now, and for future generations.	1. Recognize unconscious and widely prevalent gender biases using self-awareness and emotional intelligence. 2. Identify key sources of deep-rooted gender norms, values, and beliefs. 3. Discuss how to take specific actions to boldly shatter tired gender stereotypes, thus helping bridge the global gap.	Overview	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	04/15/20	12/31/22	QAS Self-Study	



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Course #	Field of Study	Title	CPE Credit	Product Description	Learning Objectives	Knowledge Level	Prerequisites	Advance Preparation	Release Date	Expiration Date	Delivery Method	
67	Personnel/HR	Cognizance of Bias Benefits the Workplace	2.0	Everyone has some bias. When we become aware of our personal and company biases, we can make conscious efforts to reduce them. By minimizing biases, you and your company will become more inclusive and diverse. Research indicates that with a variety of talents, skills, experiences, backgrounds, cultures, languages, and work styles, teams are more collaborative and innovative. When your teams are thriving, you create a place where employees will feel confident in their skills, achieve their best, and feel comfortable and happy. They are more likely to continue as a productive employee for your company, thereby increasing their success and that of your company.	1. Define bias and identify how cognitive reasoning and stereotypes impact biases. 2. Describe implicit bias. 3. Describe unconscious bias. 4. Explain the value of diversity and inclusion for teamwork and across cultures. 5. Recognize bias and its effects in the workplace. 6. Discuss strategies for overcoming biases to achieve success.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	07/15/20	12/31/22	QAS Self-Study	
68	Personnel/HR	If Not You, Who? How to Crack the Code of Employee Disengagement	2.0	Companies in the top tier of employee engagement outperform their peers by 147% in earnings per share and have a 90% better growth trend than their competition. Yet only 13% of global workers are engaged, which means the vast majority sleepwalk through the day, giving you zero discretionary effort. How do you inspire employees to get off the sidelines and get into the game? Jill Christensen, author of the best-selling book, "If Not You, Who? Cracking the Code of Employee Disengagement," has uncovered a proven four-step strategy to turn a disengaged workforce into a unified high-performing team, resulting in increased profits, customer satisfaction, productivity, and retention. Attend this session today and start reengaging employees tomorrow.	1. Recognize why traditional approaches to employee engagement doesn't work. 2. Identify an innovative, proven four-step process to reengage employees. 3. Describe tactics to engage senior leaders in employee engagement.	Intermediate	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	08/15/20	12/31/22	QAS Self-Study	
69	Personnel/Human Resources	Cross-Cultural Communication: Understanding Common Communication Pitfalls in a Globalized World	1.8	In an age of technology-driven communication and ease of travel, companies are doing more business with professionals from other parts of the world. However, one small cultural misstep could be the difference between a successful business deal and a failed endeavor. In this session, learn about tools especially aimed at communication styles and decision methodologies that can help you understand and overcome cultural differences. Participants explore two different conceptual frameworks and where to find resources to be utilized in the planning stages prior to engaging in cross-cultural communication.	1. Recognize common cultural missteps and how to avoid them. 2. Explore the difference between individualist and collectivist societies. 3. Identify cultural differences that may impact how business is conducted including communication, leadership, and decision making, how business is conducted, and cultural views of time and scheduling.	Basic	None	None	02/15/22	06/30/23	QAS Self-Study	
70	Specialized Knowledge	Exploring Private Equity and Venture Capital Acquisition Transactions	1.5	This session provides insight into the private equity and venture capital investor discipline. Gain knowledge about what private equity and venture capital investors look for in regards to valuation of a company, including the financial and nonfinancial KPIs that are focused on, typical financing structures, and the finance department demands after a completed transaction with private equity or venture capital.	1. Describe how private equity and venture capital investors conduct valuation and due diligence. 2. Recognize the typical financing structures used by private equity and venture capital investors. 3. Explain the demands placed on finance professionals after a transaction has closed.	Advanced	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	10/01/17	12/31/22	QAS Self-Study	
71	Specialized Knowledge	Six Sigma Principles Every Management Accountant Should Know	2.4	This session is designed to help every management accountant understand how Six Sigma can help diagnose problems and improve organizational performance. The power of Six Sigma thinking is demonstrated by discussing its primary purpose and core principles using basic statistics. The session also addresses actual scenarios and examples where relevant Six Sigma knowledge may be applied. After this session, attendees should have greater confidence in their ability to distinguish meaningful change from noise after this session.	1. Explain the primary purpose of Six Sigma. 2. Define key terminology and basic concepts related to the use of Six Sigma. 3. Describe the five phases of the Six Sigma improvement process. 4. Demonstrate potential Six Sigma applications.	Basic	Work experience in a professional staff environment or educational studies in accounting, business, or a related field.	none	03/13/20	12/31/22	QAS Self-Study	