Speaker Proposal Guide

2020 International Conference
19–22 July
Miami Beach Convention Center, Miami, FL
Submission Deadline: 25 August 2019

OVERVIEW
This document has been developed as a guide for proposal submissions for the 2020 International Conference. We encourage all potential speakers to review this document prior to submitting a proposal for consideration.

We seek dynamic presenters who can engage their audience and conduct thought-provoking discussions. You are encouraged to participate by submitting a proposal to speak, noting the topic on which you would like to present within the education formats noted below.

Topics of interest for the conference include:

- Agility
- Artificial intelligence
- Audit report writing
- Blockchain
- Building relationships with key stakeholders
- Business acumen
- Communication
- Critical thinking
- Culture
- Cyber
- Data analytics
- Disruption
- Diversity
- Emotional intelligence
- ERM
- Ethical Hacking
- Ethics
- Fraud
- GDPR
- Governance, risk, and control
- Internal audit career path
- Influence
- Innovation
- Internet of Things (big data)
- Personal Branding
- Privacy
- Public sector
- Ransomware/dark web/social engineering
- Regulatory Issues
- Robotic process automation
- Strategic planning
- Sustainability reporting
- Trusted advisor
  - Internal audit’s role as an advisor vs. assurance in the technology movement
- Talent management
  - Generational gaps
  - Managing up
  - Recruitment and retention
  - Next generation of audit
  - Succession planning
- Third Party/Vendor Management

Proposals will be evaluated on the following criteria:
A proven track record as a speaker. The proposal form will include space where we encourage you to enter any additional comments, past speaker scores, or speaking references.

- Include up-to-date data, case studies, and resources.
- Provide practical strategies (real-world examples), tools, and/or take-home messages for implementation in the practice setting for successful outcomes (emphasize how to, what works, and why).
- The ability to share leading practices and innovative tactics implemented in your internal audit function.
- The level of interaction the session will provide the attendees, including Q&A, polling technology, case studies, and takeaway tools.
- Refrain from sales or self-promotions of products and services.
- Service providers and/or consultants are required to provide a current practitioner with whom they will be co-presenting. It is highly encouraged for service providers to include their co-presenter’s information in their submission, as this will be taken into consideration during the review process. If this information is not already identified in the submission and the proposal is accepted, the co-presenting practitioner will need to be identified within two weeks after presentation acceptance.
- Presentations that can address a global audience will be given priority.

Speaking at the International Conference is a volunteer opportunity. Compensation for speaking fees and travel is not provided unless otherwise indicated. If you will need assistance with travel, please indicate that in your submission. All speakers receive a complimentary, non-transferable, full registration for the 2020 International Conference. Speakers from outside North America will receive two nights’ hotel accommodations.

Important timeline events include:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadline for submission of proposals</td>
<td>25 August 2019</td>
</tr>
<tr>
<td>Proposals reviewed by The IIA and Conference Program Committee</td>
<td>26 August–18 September 2019</td>
</tr>
<tr>
<td>Invitation issued to selected speakers</td>
<td>Week of 23 September 2019</td>
</tr>
<tr>
<td>Email notification to speakers who were not selected</td>
<td>Week of 14 October 2019</td>
</tr>
</tbody>
</table>

**GUIDELINES FOR PROPOSALS**

The 2020 International Conference program is designed to showcase a variety of formats to foster positive learning outcomes. Speaker proposal submissions will need to fulfill the criteria of one or more of the following formats:

- **Standard Session**
  The speaker presents a traditional session which includes time for audience question and answer.

- **Case-based Learning**
The speaker presents a case scenario highlighting a situation, event, and/or process and takes the audience through the journey of how to manage the scenario for best outcomes. Interactivity is facilitated through polling, audience Q&A, and report-out activities.

- **In Conversation With**
  In this interview-style format, attendees will have the opportunity to converse with leaders in internal auditing and learn how they have applied knowledge, attitude, and skills for effective results. Ideally, the speaker will introduce a scenario where he/she has been able to foster good outcomes. The facilitator will ask pertinent questions and engage the audience in the discussion. Submissions to this format must include the names of both the facilitator and the presenter.

- **Deep Dive Learning Labs**
  Deep Dive Learning Labs are two-part interactive sessions highlighting strategies, tools, resources, and innovative methods for positive outcomes. These sessions should incorporate interactive discussion techniques such as case studies, problem solving exercises, hands-on use of tools, and polling technology. Each proposal should include two sessions: a Part I introduction followed by a Part II deeper dive providing practical takeaways for implementation in the practice setting.

- **Soundbite Sessions**
  This Ted-talk style format will feature three presenters. Each presenter will have 10-15 minutes to walk the audience through an overview of the topic. Submissions should be conducive to providing a high-level overview within the allotted timeframe. The final 15 minutes will be a facilitated discussion with audience Q&A. Each presenter will have five minutes to respond to questions.

- **Tools and Techniques**
  Gain practical tools and techniques to maximize efficiencies in internal auditing. Learn how these tools and techniques have been applied to increase efficiencies and facilitate positive outcomes. Presenters should be prepared to share collateral and make the tool available for download through the conference app.

- **Spanish Track**
  This track will cover all relevant topics and be presented in Spanish. Proposals in this track should be submitted in English with the intention to present the session in Spanish. Only those who are fluent in the desired language should submit to this track.

**All proposals must be submitted using the online form.** Think quality over quantity. You may submit up to four (4) proposals on separate topics.

- **Plan your submission in advance.** We suggest that you first collect your thoughts for your proposal before going to the online form. The online submission form will allow you to start and stop via the online portal that you will have access to once you create your profile, as you may be required to research additional information, such as co-presenter contact details. The IIA and Host Conference Committee will only review completed proposals that have been submitted; please make sure you click ‘Submit’ once all information has been entered.
• **The primary point of contact is the person submitting the proposal.** The IIA will communicate with all speakers for the session regarding deadlines and submitting speaker information. The primary point of contact is responsible for submitting the final session description and learning objectives as well as the final presentation eight (8) weeks in advance of the conference.

• **All proposed speakers must be listed in the proposal.** Proposed speakers will be reviewed by The IIA International Conference team prior to acceptance. Please note, panel sessions are limited to a maximum of four (4) participants (including the moderator) per session on the program.

• **Service providers and/or consultants are required to provide a current practitioner or client with whom they will be co-presenting.** It is highly recommended to include the current practitioner or client in the submission for consideration. If this information is not already identified in the submission and the proposal is accepted, the co-presenting practitioner will need to be identified within two weeks after presentation acceptance. If the co-presenter is not identified within the required timeframe, The IIA reserves the right to remove the session from the program.

• **Use clear, error-free language.** Session proposals require clear and concise titles (limit 10 words), a clear outcome with focused descriptions in a short format (limit 75 words), and three to four action-oriented, well-thought-out learning objectives/takeaways that answer the prompt “In this session, participants will...” The IIA retains the right to edit all copy submitted for marketing purposes. The intent is to provide clear, concise information to attendees.

• **Don’t underestimate the importance of interactivity during your session.** Sessions that include the use of polling, case studies, problem solving exercises, and deep dive discussions with practical takeaways for implementation in the practice setting will be given special consideration. Be sure to adhere to the requirements of the various formats when submitting your proposal.

• **Avoid all commercial bias.** Sessions perceived by attendees as commercially biased in content or as sales pitches for service provider/consultant services and/or tools are unacceptable. Any submission that is not educational in nature, neutral, unbiased, and free of commercial motive/intent will not be accepted. Those who violate this policy may forfeit future speaking opportunities with The IIA.

• **All accepted speakers must adhere to published deadlines.** You must be committed and responsive to working with The IIA Conference team to deliver an exceptional session by adhering to deadlines, including submission of your PowerPoint presentation no less than eight (8) weeks prior to the start of the conference for review and approval by The IIA International Conference team and subject matter experts as well as for inclusion in the conference app prior to the start of the conference. Upon review of the presentation, comments will be provided to the speaker to review and update the PowerPoint prior to the conference.

• **All speakers will be registered for the conference and hotel arrangements will be made by The IIA.** All speakers receive a complimentary registration and will automatically be registered for the conference. Speakers outside of North America will receive two nights’ hotel accommodations. Speakers will provide The IIA with their requested dates for hotel accommodations by the requested deadline. The IIA will reserve speakers’ hotel rooms in the group block and will provide a confirmation number no later than two (2) weeks before the start of the conference. Speakers are responsible for all expenses, unless previously agreed to by The IIA.
SAMPLE SUBMISSION FORM

To prepare for completing the required online form, please use this sample to gather proposal details and full speaker details for each presenter/co-presenter in advance. Information submitted with the proposal will be used for marketing the conference program. Please ensure all information is accurate prior to submitting.

STEP 1. PERSONAL DETAILS

All “Personal Details” questions will appear for each presenter. Please collect the information you need for each in advance before you begin your online submission. All co-presenters must be submitted for consideration and approval.

CONTACT INFORMATION

First Name: _________________________________________
Last Name: __________________________________________
Credentials (if applicable): ______________________________
Job Title: ____________________________ Organization: _________________________
Country: ____________________________
Email: _____________________________________________
Office Phone: __________________________ Mobile Phone: _________________________

Do you prefer to be contacted directly or through your assistant?

○ Directly
○ Please contact me through my assistant

ASSISTANT CONTACT INFORMATION

First Name: ____________________________ Last Name: ____________________________
Office Phone: _________________________ Email: ________________________________
BIOGRAPHY

Please provide a short biography (limit 250 words) in paragraph format that describes your experience and expertise. The biography submitted with your proposal will be used as part of the conference materials if your submission is accepted. Omit educational background unless you are a faculty member of a college or university.

PROPOSAL/PRESENTATION INFORMATION

Please submit a thoughtful proposal that clearly articulates the intent of your session. Use proper spelling and grammar to aid in the readability and comprehension of your content.

- Have you presented at an IIA conference in the last three (3) years?
- Are you a consultant or practitioner?
  - Consultant
  - Practitioner
- Speakers categorized as consultants are required to co-present with a client/practitioner. Do you have your co-presenter’s contact information at this time?
  - Yes
  - No

If a consultant’s proposal is accepted, you must submit your co-presenter’s contact information within two (2) weeks of acceptance to be confirmed for participation in the conference program. If co-presenter information is not received within that timeframe, we cannot guarantee your participation and your session is subject to be removed from the program.

Proposed Presentation or Session Details

SESSION FORMAT

In what format will this topic be presented? (Please select from the drop-down menu.)

SESSION TOPIC

From the drop-down menu, select the appropriate topic noting the content of your proposal.

TITLE & DESCRIPTION

Please describe the overall focus and goal of the session, including key points and supporting topics. If selected, your description may be edited for use in the marketing brochure, app, and on our website.

NOTE: Please do not include speaker, company, or product names in the session description.
SESSION TITLE (Limit 10 words): ________________________________________

SHORT SESSION DESCRIPTION (Limit 75 words):

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

LEARNING OBJECTIVES

To help bring the content to life and make it actionable, please clearly define the new knowledge, skills, and abilities session participants will be prepared to apply back at the office following your session. We recommend you start with an action/measurable verb one might use to assess learning outcomes and that will complete this sentence: “In this session, participants will…”

Please list three to four learning objectives:

1.____________________________________________________________________________
2.____________________________________________________________________________
3.____________________________________________________________________________
4.____________________________________________________________________________

NOTE: A list of action/measurable verbs for learning outcomes is included at the end of this document.

SAMPLE SESSION DESCRIPTION & LEARNING OBJECTIVES:

Most internal audit functions include consulting services as a part of their audit charter. But is it really clear which type of service is assurance versus consulting? Is it possible to have elements of both in an engagement, and still comply with The IIA’s Standards?

In this session, participants will:

- Distinguish between assurance, consulting, and blended engagements.
- Describe the criteria for conducting blended engagements, versus pure assurance or consulting engagements.
- Follow a principles-based framework for conducting blended engagements, while ensuring compliance with The IIA’s Standards.
- Develop ideas for reporting the assurance and consulting components of blended engagements.
ADDITIONAL SESSION INFORMATION

How do you plan to make this session interactive? Please check all that apply.

- Question and Answer
- Polling
- Case Studies
- Tangible Tools and Techniques
- Group Exercise
- Other _________________________

Is the content applicable to small audit functions?

- Yes
- No

At what level will this topic be discussed?

- Basic
- Intermediate
- Advanced
- Update
- Overview

For what experience level is your session best suited?

- Staff Auditor
- Experienced/Senior Auditor
- Manager
- Director
- Chief Audit Executive

Please select the most appropriate NASBA Field of Study for your session:

- Accounting
- Accounting (Governmental)
- Auditing
- Auditing (Governmental)
- Behavioral Ethics
- Business Law
- Business Management & Organization
- Communications & Marketing
- Computer Software & Applications
- Economics
TOPIC #1: CO-PRESENTER INFORMATION

How many co-presenters will you have?

- One
- Two
- Three
- I will be the only one presenting

CO-PRESENTER CONTACT INFORMATION

First Name: _________________________________________

Last Name: _________________________________________

Credentials (if applicable): ______________________________

Job Title: ____________________________ Organization: ______________________________

Email: _______________________________ Twitter Handle: ____________________________

Office Phone: __________________________ Mobile Phone: ____________________________
## ACTION / MEASURABLE VERBS FOR LEARNING OUTCOMES

**Bloom’s Taxonomy of Educational Objectives (1956): Cognitive Skills**

<table>
<thead>
<tr>
<th>Foundational</th>
<th>Knowledge Level: The successful student will recognize or recall learned information.</th>
</tr>
</thead>
<tbody>
<tr>
<td>list</td>
<td>record</td>
</tr>
<tr>
<td>state</td>
<td>define</td>
</tr>
<tr>
<td>name</td>
<td>relate</td>
</tr>
<tr>
<td>tell</td>
<td>recall</td>
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<tr>
<td>recall</td>
<td>repeat</td>
</tr>
<tr>
<td>label</td>
<td>select</td>
</tr>
<tr>
<td></td>
<td><strong>Comprehension Level:</strong> The successful student will restate or interpret information in their own words.</td>
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<tr>
<td>explain</td>
<td>describe</td>
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<tr>
<td>translate</td>
<td>report</td>
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<tr>
<td>identify</td>
<td>summarize</td>
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<td>restate</td>
<td>discuss</td>
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<td>discuss</td>
<td>illustrate</td>
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<tr>
<td>tell</td>
<td>critique</td>
</tr>
<tr>
<td>reference</td>
<td>reiterate</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Applied</th>
<th>Application Level: The successful student will use or apply the learned information.</th>
</tr>
</thead>
<tbody>
<tr>
<td>apply</td>
<td>sketch</td>
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<tr>
<td>use</td>
<td>perform</td>
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<tr>
<td>practice</td>
<td>role-play</td>
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<tr>
<td>demonstrate</td>
<td>conduct</td>
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<tr>
<td>complete</td>
<td>execute</td>
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<td></td>
<td><strong>Analysis Level:</strong> The successful student will examine the learned information critically.</td>
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<tr>
<td>analyze</td>
<td>inspect</td>
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<tr>
<td>distinguish</td>
<td>critique</td>
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<td>differentiate</td>
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<td>appraise</td>
<td>quantify</td>
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<td>calculate</td>
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<td>test</td>
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<td>extrapolate</td>
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<td></td>
<td>theorize</td>
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<tr>
<td></td>
<td>debate</td>
</tr>
</tbody>
</table>
### Strategic

**Synthesis Level**: The successful student will create new models using the learned information.

- develop
- plan
- build
- create
- design
- organize

- revise
- formulate
- propose
- establish
- integrate
- modify

- compose
- collect
- construct
- prepare
- devise
- manage

### Evaluation Level**: The successful student will assess or judge the value of learned information.

- review
- justify
- assess
- defend
- report on
- investigate

- appraise
- argue
- rate
- score
- select
- measure

- choose
- conclude
- compare
- evaluate
- interpret
- support