



The Motivator

North Carolina Triangle Area Chapter #406
Institute of Management Accountants

March 2004

March 18, 2004 Dinner Seminar-Student Chapter Night

Date & Time: Thursday, March 18, 2004, 6 PM

Place: RTP Marriot, off Miami Blvd.

\$25 IMA Chapter #406 as of the 1st of the current month ; \$30 IMA -members; \$35 non-members –Register before 3/15 \$30 IMA Chapter # 406 as of the 1st of the current month; \$35 IMAmembers ; \$40 non -members–Register after 3/14

Speaker: Bob Callanan, Principal – Consulting Division, Thomas, Knight, Trent & King

Topic: Software Trends Field of Study: Personal Development Recommended CPE: 1 Hour Prerequisites: None
Level: Basic Advance Preparation: None Teaching Method: Lecture/Discussion

April 15, 2004 Dinner Seminar

Date & Time: Thursday, April 15, 2004, 6 PM

Place: RTP Marriot, off Miami Blvd.

\$25 IMA Chapter #406 as of the 1st of the current month ; \$30 IMA -members; \$35 non-members –Register before 4/11 \$30 IMA Chapter # 406 as of the 1st of the current month; \$35 IMAmembers ; \$40 non -members–Register after 4/10

Speaker: Bob Bazemore, Progress Energy

Topic: TBA

Field of Study: Personal Development

Recommended CPE: 1 Hour Level: Basic

Prerequisites: None Advance Preparation: None

Teaching Method: Lecture/Discussion

The North Carolina Triangle Chapter of the IMA is registered with the NC State Board of CPA Examiners as a sponsor of continuing professional education. Complaints or comments regarding registered sponsors may be addressed to the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh, NC 27605-2827

ADVERTISE IN THE MOTIVATOR

Would you like to get your message out to 500 of the area's accounting and finance professionals? We are planning on running ads in The Motivator. We are also looking for sponsors to pick up mailing costs of the monthly newsletter in exchange for exclusive advertising opportunities. If you are interested in taking advantage of these opportunities, please contact Teresa Muncer-Shimp, 859-5550 ext. 206, tshimp@nc.rr.com

VISIT THE IMA CAROLINAS COUNCIL WEBSITE @ <http://www.imacarolinascouncil.org>

The website has all the speaker and registration information. There will be the Spring meeting of the council. For more information go to the council's [website http://www.imacarolinascouncil.org/news.htm](http://www.imacarolinascouncil.org/news.htm)

This month's newsletter is sponsored by:



Hudson
HUDSON GLOBAL RESOURCES

We are proud to support the IMA and the talented people behind it.

Hudson is one of the world's leading professional staffing, outsourcing and human resource consultancies. Our Accounting & Finance practice covers your accounting, audit, tax and finance projects. See where our talent takes you.

Contact:
Drake Berryhill, 919-878-5005 x 137
drake.berryhill@hudson.com
www.hudson.com

Mark your calendars for the 3rd Thursday of each month at the Marriott Hotel for dinner meetings and register for any of our meetings at our web site www.imanctriangle.org.

Dinner Meetings

Date	Topic/Event	Speaker
March 18, 2004	Software Trends <i>Student Chapter Night</i>	Bob Callanan Principal - Consulting Division with Thomas, Knight, Trent & King
April 15, 2004	Industry Leader <i>CMA/CFM Recognition Night</i>	Bob Bazemore, Corporate Controller, Progress Energy
May 20, 2004	Economic Update <i>Past Presidents Night</i>	Dr. Mike Walden William Neal Reynolds Distinguished Professor & Extension Economist for NC State University's Dept. of Agricultural & Resource Economics

MICHAEL L. WALDEN – May’s Dinner Speaker

Dr. Michael L. Walden is a William Neal Reynolds Distinguished Professor and Extension Economist in the Department of Agricultural and Resource Economics at North Carolina State University. His Ph.D. degree is from Cornell University and he has been at N.C. State since 1978.

Dr. Walden has teaching, research, and extension responsibilities at NCSU in the areas of consumer economics, economic outlook, and public policy. He has published three books and over 200 articles and reports. He has served on several local and state level commissions, including the Governor's Welfare Reform Task Force and the School Capital Construction Legislative Study Commission.

Dr. Walden can be frequently seen, heard, and read in the media. He has both daily and weekly radio programs aired on stations around North Carolina for which he has won two national awards. He is often interviewed on local TV and radio news broadcasts, has appeared on *NBC*, *CBS*, and the *Newshour With Jim Lehrer*, and is frequently quoted in such newspapers as the *Raleigh News and Observer*, *The Charlotte Observer*, *The Boston Globe*, *The Wall Street Journal*, and *The Washington Post*. His biweekly column, *You Decide*, is carried by over forty newspapers in the state.

Dr. Walden directs the semiannual economic forecast, *The North Carolina Economic Outlook*. He has won a *Premiere Forecaster Award* from the American Agricultural Economics Association, and he has won three *Applied Consumer Economics Awards* from the American Council on Consumer Interests. He lives in Raleigh, North Carolina with his wife, Mary.

From the President

Dear Fellow IMAers !

We had a very good meeting in February, with Stuart Levine, (Stuart Levine & Associates) (www.levineassociates.net) speaking on the topic of Networking. He was very informative to all of us, sharing tips and tricks of how to quickly meet new individuals and reacquaint your self with old friends while circling through a room full of people. We truly appreciate his time and willingness to share his experiences and knowledge with us.

Our dinner speaker for March 18, 2004 is Bob Callanan, Principal - Consulting Division with Thomas, Knight, Trent & King, speaking on the topic of Software Trends. (The pre-registration deadline is Sunday, March 14, 2004 before the Thursday dinner meeting. This pre-registration allows us to plan the room size and setup we need for the meeting. Cancellations need to be in by noon of the day of the dinner if we are to successfully reduce our guarantee to the hotel.) March 18th is also **Student Night -- Dinner is FREE to the first 20 students who register on line.**

Do you have a certification? Have you considered getting a jump start on fulfilling your 2004 CPE requirements? ***Please tell friends and co-workers of this local opportunity to obtain CPE at a reasonable cost!***

- ? Our next Professional Development Seminar, will be 8 hours of CPE on Saturday, March 20th. The morning session will be ***Financial Systems-Selecting, Implementing, Using and Maximizing Impact*** and the afternoon session will be ***Negotiation Skills*** -Basics for Making the Deal. Please go to our website for course brochure and registration www.imanctriangle.org .
- ? March 24th the NC State Student Chapter is hosting Brian Blasko, Motivational speaker from Ohio, speaking on the topic of Lessons in Leadership. The meeting is held at NC State, Nelson Hall, 3rd Floor Accounting Department Room 2406, Hillsborough Street, Raleigh, NC. Social at 7:00 pm, meeting 7:30 – 8:30 pm and 1 hour CPE. Please come out and show your support for our student Chapter !
- ? **April 29 - 30, 2004.** Plan to join us this Spring as the Carolinas Council continues its 30 -year tradition of excellence in CPE at Ocean Creek Conference Center, Myrtle Beach, SC. Up to 14 hours of CPE. Please go to our website for course brochure and registration www.imacarolinascouncil.org
- ? **June 26 – 30, 2004** The IMA 85th Annual Conference & Exposition June 26 – 30, 2004, Hyatt Regency Chicago on the Riverwalk, Chicago, IL. Up to 38 hours of CPE. Please go to the website for course brochure and registration www.imanet.org
- ?

Volunteers are needed for the National Conference, please go to our website for details. Support IMA and save your self \$\$\$ on registration costs. www.imanctriangle.org/volunteer-chicago.pdf

See you at dinner !

Kathy Santos-Rezendes

IMA Chapter #406 President

CPE sessions

Date	Topic	Instructor
March 20, 2004	Financial Systems 4 hrs CPE	Lea Strickland
March 20, 2004	Negotiation Skills 4 hours of CPE	Lea Strickland
April 29-30, 2004	Spring Conference, Myrtle Beach SC	Carolinas Council

LOG ONTO THE CHAPTER'S WEBSITE

The Chapter's web site can be found at www.imanctriangle.org. Keep up with the latest information about chapter events and upcoming CPE opportunities.

EMPLOYMENT OPPORTUNITIES – From the Chapter's Employment Director

The Chapter serves its members by connecting those seeking positions with employers that have positions available. The Chapter's Director of Employment is Chris McKittrick. For further information or to submit a resume please e-mail Chris McKittrick at ctm1999@hotmail.com.

IMA Student Chapter Meeting Dates

March 18 – Student Nite at the Triangle Chapter Dinner Meeting. First 20 student registrations free!

March 24 – Brian Blasko, Motivational speaker from Ohio, Topic: Lessons in Leadership. This meeting will count as one free CPE hour for all professionals that attend.

April 21 – Technical meeting to elect new officers

The Student Chapter invites all members of the professional chapter to take part in student chapter activities. All meetings are held at NC State, Nelson Hall, corner of Dan Allen Dr. and Hillsborough St.

7-7:30 Social, 3rd floor Accounting Department Lobby; 7:30 – 8:30 Meeting in Room 2406.

For fund raising - RBC CENTER VOLUNTEER DATES

1. Sun., Mar. 7, Canes v NJ, Booth 128, 7 PM

2. Thu., Mar. 25, Canes v. Fla., Booth 109, 7 PM

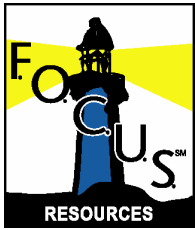
Please email tshimp@nc.rr.com your availability for volunteering. Thank you for your time and support in advance.

Triangle Chapter # 406 BOARD OF DIRECTORS		Competition Year 2003-2004
President	Kathy Santos-Rezendes	kas@rti.org
Carolina Council Delegates	Phil Horton Ron Lowell	phil.horton@wellsfargo.com ronlowell@solectron.com
Vice Pres. Administration	Chris Johnson	chris.johnson@pergo.com
Director of Employment	Chris McKittrick	ctm1999@hotmail.com
Treasurer	Lowell Miller	nclhga@earthlink.net
Secretary	Jim Santaniello	jim.santaniello@highwoods.com
Directors Member Attendance	Lisa Frady-Davis	lfrady@nortelnetworks.com
Director Fund Raising	Bob Sefton Teresa Muncer-Shimp	resefton@aol.com tshimp@nc.rr.com
Vice President Membership	Ted Bachman	tedbachman@mindspring.com
Director Member Acquisition	Drake Berryhill	Drake.Berryhill@hudson.com
Director Member Retention	Maggie Klug	maggie.klug@rhmr.com
Director Special Activities	Jeanette King	
Director Student Activities	Max Shishnyak	maxshish@hotmail.com
Director Community Service	Bob Boone	rdboone2000@yahoo.com
Vice President Education		ronlowell@solectron.com
Directors CMA/CFM Programs	Ron Lowell Ted Greer	geg354@hotmail.com
Director Seminars	Bob Wage	rwage@ati-ia.com
Director Manuscripts	Steve Drago	dragosss@aol.com
Director Program Registration	Jennifer Coltrane	jennsh@prodigy.net
Chair-Corporate Development	Phil Horton Joseph Fields	phil.horton@wellsfargo.com josephfields@spherion.com
Vice Pres. Communications	David Roth	david.roth@smtresource.com
Director Newsletter	Tim Romocki	tim.romocki@treasurer.state.nc.us
Director Public Relations	Nancy Smith	nancy.e.smith@mci.com
Director Website	Kathy Santos-Rezendes	kas@rti.org
Director Roster	Sue Durphy	sue.durphy@ajilonfinance.com
Student Chapter President (NC STATE)	Chrisy Cook	wchrisy@hotmail.com



North Carolina Triangle Area Chapter #0406

EDUCATION SERIES



AM Workshop:

Financial Systems – Selecting, Implementing, Using and Maximizing Impact

This workshop is intended to walk the participant through the elements of selecting a “financial” system for the organization. Financial systems range from the basic accounting packages (Quickbooks, etc.) to the complex enterprise resource planning systems (BaaN, SAP, Syteline, and others).

The first part of the workshop focuses on participants identifying the key elements of the business operations that they need to manage and model to be effective in their role and for others to be effective. The process is to walk through some of the day-to-day activities that businesses engage in and relate those activities and questions back to the financial systems needed.

The second part of the workshop is about “designing” the system that the company needs. The “design” is the elements that the organization uses, needs and wants, then identifying the must haves versus the nice to haves for the search and review of existing packages and systems.

The final step in the workshop is to discuss different options available including technology, functionality, leasing, and other factors that businesses need to consider in making a selection. The workshop is intended to provide participants with a basic understanding of the process of selecting financial systems and the impact of understanding the “use” of the system before selection.



PM Workshop:

Negotiation Skills – Basics of Making The Deal

This workshop walks the participant through the elements of negotiation and the process. By identifying the key components and factors of the “deal”, participants get an understanding of how to achieve the desired outcomes and achieve win/win relationships.

First, the essentials of the negotiation process and “psychology” of deal-making is reviewed. This enables the participant to position themselves in any bargaining relationship for success.

Second, common negotiation situations are discussed: salary negotiations, job offers, purchasing deals, and other real life examples.

Third, a negotiation exercise will be used to solidify the materials presented in the minds of the participants.