THE INSTITUTE OF INTERNAL AUDITORS × ISACA
DETROIT CHAPTERS

The Institute of **Internal Auditors** *Detroit*

ISACA® Detroit Chapter

2027 SPRING CONFERENCE

Explore. Learn. Lead.

In-Person Learning
April 12–14, 2027

Virtual Learning
April 19–May 6, 2027



Course Guide

Course details, speaker bios, and learning objectives

At a Glance

The Institute of Internal Auditors Detroit | ISACA Detroit Chapter

Full program, session times, and CPE values.

Pricing

Per attendee. Early-bird ends January 15, 2027.

IN-PERSON SESSIONS

RATE	1 DAY	2 DAYS	3 DAYS
Member — early bird	$360	$720	$1,080
Member — from January 16, 2027	$400	$800	$1,200
Non-member — early bird	$460	$920	$1,380
Non-member — from January 16, 2027	$500	$1,000	$1,500
Students — student track			$75 per course

VIRTUAL SESSIONS

RATE	½ DAY	1 DAY	2 DAYS	3 DAYS
Member — early bird	$160	$325	$650	$975
Member — from January 16, 2027	$180	$360	$720	$1,080
Non-member — early bird	$210	$425	$850	$1,275
Non-member — from January 16, 2027	$230	$460	$920	$1,380

Not a member? Non-members can join the IIA or ISACA to receive member pricing. Join at theiia.org/membership or isaca.org/membership.

STAY AT THE HENRY $239/night group rate | April 11–14, 2027 **BOOK THE CONFERENCE HOTEL**

REGISTER Scan QR code

In-Person | April 12–14

	MON • APR 12	TUE • APR 13	WED • APR 14
Personal Development Kristie Stocker	It's Go Time! Six Moves to Boost Your Leadership Edge and Stand Out 8:30 am – 4:30 pm 8 CPEs	Crack the People Code: What Makes People Tick—and How to Click 8:30 am – 4:30 pm 8 CPEs	The Collaboration Fix: Clearer Communication for Stronger Teams 8:30 am – 4:30 pm 8 CPEs
Fraud & AI Dr. Toby Groves	Will the Real Fraudster Please Stand Up? 8:30 am – 4:30 pm 8 CPEs NASBA	Insider Threat: The Call Is Coming from Inside the House 8:30 am – 4:30 pm 8 CPEs NASBA	Auditing the AI-Enabled Organization 8:30 am – 4:30 pm 8 CPEs NASBA
Technology Mitch Levine	How to Perform Integrated Audits for AI-Augmented Business Processes 8:30 am – 4:30 pm 8 CPEs	How to Perform Comprehensive & Cost-Effective IT Audits 8:30 am – 4:30 pm 8 CPEs	Auditing IT Vendor Management 8:30 am – 4:30 pm 8 CPEs
Cybersecurity Sajay Rai	Case Study on How to Perform Cybersecurity Audit 8:30 am – 4:30 pm 8 CPEs	Threat Intelligence and Threat Hunting 8:30 am – 4:30 pm 8 CPEs	Harnessing AI within Your Enterprise 8:30 am – 4:30 pm 8 CPEs
Audit Paul Zikmund	Business Resiliency: Building an Effective Program 8:30 am – 4:30 pm 8 CPEs	Fraud Risk Management: Implementing a Holistic Program 8:30 am – 4:30 pm 8 CPEs	Next-Gen Internal Audit: Leveraging Blue Ocean Strategy to Drive Value and Elevate the Function 8:30 am – 4:30 pm 8 CPEs
Third Party Paul Claiborne	Third-Party Risk Governance and Regulatory Expectations: Building an Effective TPRM Framework 8:30 am – 4:30 pm 8 CPEs	Third-Party Risk Assessment and Lifecycle Management: Identifying, Evaluating, and Monitoring Third-Party Risks 8:30 am – 4:30 pm 8 CPEs	Auditing Third-Party Risk Management Programs: Developing a Risk-Based Internal Audit Approach 8:30 am – 4:30 pm 8 CPEs
Certification Multiple presenters	Kyle Miller & Cooper Dayton Advanced in AI Audit (AAIA) Exam Prep 8:30 am – 4:30 pm 8 CPEs	Kyle Miller & Cooper Dayton Advanced in AI Audit (AAIA) Exam Prep 8:30 am – 4:30 pm 8 CPEs	Steve Doyle CIA Part 1 Exam Prep: Internal Audit Fundamentals 8:30 am – 4:30 pm 8 CPEs
Student Multiple presenters	Alan Demir Launching Your Internal Audit Career 8:30 am – 12 pm 4 CPEs	Brooke Teska, Martin Jordan & Emily Hill Trust, Build, Govern: Internal Audit in the Age of Agentic AI 8:30 am – 12 pm 4 CPEs Robert Jarakas Working Smarter with AI: Practical Applications for Future Internal Auditors 1 pm – 4:30 pm 4 CPEs	Greg Boehmer Building Professional Foundations: Communication, Recruiting, and Career Growth 8:30 am – 12 pm 4 CPEs Eric Ringle From Data to Decisions: A Hands-On Data Analytics Challenge 1 pm – 4:30 pm 4 CPEs

NASBA Sessions carrying NASBA-registered CPE sponsorship CPE values shown per session. Times are Eastern.

At a Glance

The Institute of Internal Auditors Detroit | ISACA Detroit Chapter

Virtual sessions run across three weeks following the in-person conference.

Virtual | April 19–May 6

WEEK 1 — April 19–22, 2027

MON • APR 19

Don Levonius
Setting Performance Expectations: How to Co-Create Clear Performance Plans
8:30 am – 12 pm **4 CPEs**

Don Levonius
Addressing Poor Performance: How to Manage Underperforming Employees
1 pm – 4:30 pm **4 CPEs**

Dr. Hernan Murdock
Essential Soft Skills for Internal Auditors
8:30 am – 4:30 pm **8 CPEs**

TUE • APR 20

Don Levonius
Communicating Across Generations: How to Speak to Boomers, Xers, Yers, Zers
8:30 am – 12 pm **4 CPEs**

Don Levonius
Appreciating Generation Z: How to Inspire Your Next Gen Employees
1 pm – 4:30 pm **4 CPEs**

Dr. Hernan Murdock
Managing and Leading the Internal Audit Function
8:30 am – 4:30 pm **8 CPEs**

WED • APR 21

Dr. Keith Levick
Create an Attitude of Gratitude
8:30 am – 12 pm **4 CPEs**

Jack Reagan
Internal Audit's Role in AI Governance for Government and Not-for-Profit
1 pm – 4:30 pm **4 CPEs**

Dr. Toby Groves
The Future of Thinking
8:30 am – 4:30 pm **8 CPEs**
NASBA

THU • APR 22

Dr. Keith Levick
Creating Your Professional Brand
8:30 am – 12 pm **4 CPEs**

Liz Meyers
Internal Audit: Becoming a Trusted Advisor to the Business
1 pm – 4:30 pm **4 CPEs**

Dr. Toby Groves
Joint Intelligence
8:30 am – 4:30 pm **8 CPEs**
NASBA

WEEK 2 — April 26–29, 2027

MON • APR 26

Dr. Keith Levick
Leading with Purpose: Inspiring People and Unlocking Potential
8:30 am – 12 pm **4 CPEs**

Bill Jelen
Microsoft Excel: What's New, Data Analysis, and Agentic AI
1 pm – 4:30 pm **4 CPEs**

Dr. Toby Groves
Data Science and AI for Non-Data Scientists
8:30 am – 4:30 pm **8 CPEs**
NASBA

TUE • APR 27

Dr. Hernan Murdock
Root Cause Analysis
8:30 am – 4:30 pm **8 CPEs**

Kristie Stocker
From Stuck to Unstoppable: Find Your Drive. Take Bold Action. Get Lasting Results.
8:30 am – 4:30 pm **8 CPEs**

WED • APR 28

Don Levonius
Mastering the Art of Consulting: How to Influence Outcomes without Authority
8:30 am – 12 pm **4 CPEs**

Don Levonius
Promoting Civility in the Workplace: How to Recognize and Resolve Incivility
1 pm – 4:30 pm **4 CPEs**

Paul Zikmund
Cybersecurity Risk Management: Protecting Your Company's Crown Jewels
8:30 am – 4:30 pm **8 CPEs**

THU • APR 29

Alyssa Clarcq
From Death Threats to Damage Control: Internal Audit, the FBI & a Real-World Ransomware War Story
8:30 am – 12 pm **4 CPEs**
NASBA

Paul Zikmund
Next-Level ERM: Evolving Maturity, Integration, and Strategic Impact
8:30 am – 4:30 pm **8 CPEs**

WEEK 3 — May 3–6, 2027

MON • MAY 3

Alyssa Clarcq
AI in Action: 10 Hands-On Use-Cases Auditors Can Deploy Tomorrow
8:30 am – 12 pm **4 CPEs**
NASBA

Andrew Twardzik & James Hollingsworth
Energy and Industrials Sector Update
8:30 am – 12 pm **4 CPEs**

TUE • MAY 4

Seth Peterson
Third-Party & Supply-Chain Risk: Managing the Risks You Don't Own
8:30 am – 12 pm **4 CPEs**
NASBA

Danny Goldberg
Internal Audit: Experienced Internal Audit Training
8:30 am – 4:30 pm **8 CPEs**

Kristy Clark & Chrissy Walters
When the Plant Floor Becomes the Enterprise: Auditing Risk in Modern Manufacturing
1 pm – 4:30 pm **4 CPEs**

WED • MAY 5

Seth Peterson
Cybersecurity Frontlines: Practical Playbooks to Strengthen Defenses
8:30 am – 12 pm **4 CPEs**
NASBA

Brian Vazzana
Cybersecurity and AI Changing Organizations
1 pm – 4:30 pm **4 CPEs**

Danny Goldberg
Internal Audit: Keys to Being an Effective Audit Senior
8:30 am – 4:30 pm **8 CPEs**

THU • MAY 6

Adam Pajakowski
Today's Healthcare Landscape: Insights for Internal Auditors and Security Professionals
8:30 am – 12 pm **4 CPEs**

Danny Goldberg
A Deep Dive into Everything AI
8:30 am – 4:30 pm **8 CPEs**

A full course description and learning objectives can be obtained by scanning the QR code.

NASBA Sessions carrying NASBA-registered CPE sponsorship

CPE values shown per session. Times are Eastern.

In-Person | Course Guide

April 12–14, 2027 | Onsite learning



Kristie Stocker

CEO of Kinetik Edge, an award-winning speaker trusted by Nokia, Bosch and Lockheed Martin to build confident leaders.

APR 12 8:30 AM – 4:30 PM **8 CPEs**

It's Go Time! Six Moves to Boost Your Leadership Edge and Stand Out

Technical expertise alone does not get you noticed, promoted, or followed; the six-part TODARE method turns your strengths into visibility, influence, and a concrete career plan.

LEARNING OBJECTIVES

- Apply the TODARE method to overcome career obstacles and build a personal leadership action plan.
- Leverage strengths and mentor networks to build influence, position for promotion, and take immediate action.

APR 14 8:30 AM – 4:30 PM **8 CPEs**

The Collaboration Fix: Clearer Communication for Stronger Teams

Everyone leaves the same meeting with a different understanding, and the rework follows; fix the communication breakdowns and friction that slow capable teams down.

LEARNING OBJECTIVES

- Recognize and prevent communication breakdowns that cause misunderstandings, rework, and workplace conflict.
- Adapt message framing and listening to gain buy-in and build trust, accountability, and collaboration.

APR 13 8:30 AM – 4:30 PM **8 CPEs**

Crack the People Code: What Makes People Tick—and How to Click

People do not think, work, or respond the way you do, and knowing what drives them cuts conflict and brings out better work from everyone.

LEARNING OBJECTIVES

- Identify personality differences, values, and motivators shaping behavior, plus your own blind spots.
- Adapt your approach and motivational strategies to reduce friction, navigate resistance, and strengthen relationships.



Dr. Toby Groves, PhD

An experimental psychologist whose field research and live cognitive experiments with thousands of high-stakes decision-makers examine the quality of professional judgment.

APR 12 8:30 AM – 4:30 PM **8 CPEs**

Will the Real Fraudster Please Stand Up?

Red flags and the fraud triangle fit almost anyone, so they quietly confirm the suspicion you already held; the first suspect to investigate is your own thinking.

LEARNING OBJECTIVES

- Distinguish situational from person-identifying use of the fraud triangle and apply base rates to behavioral signals.
- Explain how outcome bias and private assumptions distort case learning, and test the assumptions behind your terms.

NASBA

APR 13 8:30 AM – 4:30 PM **8 CPEs**

Insider Threat: The Call Is Coming from Inside the House

The threats you are least ready for come from people who already have access and trust, with warning signs scattered across behavior, HR, and IT.

LEARNING OBJECTIVES

- Analyze behavioral, HR, and IT observables, including network anomalies and suspicious access, to detect insider risk.
- Design an insider threat program that mitigates risk while preserving organizational transparency and trust.

NASBA

APR 14 8:30 AM – 4:30 PM **8 CPEs**

Auditing the AI-Enabled Organization

Every organization already has an AI strategy, written or not, and auditing it means testing whether those accumulated decisions about authority, data, and judgment hold together.

LEARNING OBJECTIVES

- Evaluate AI strategy, portfolio, data architecture, and delegated authority against objectives and risk appetite.
- Assess model performance, governance, resilience, and AI's effects on judgment, accountability, and agentic readiness.

NASBA

In-Person | Course Guide

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Mitch Levine, CISA

Founder of Audit Serve and an IT audit consultant for 35 years, who has delivered more than 160 seminars to over 30 ISACA and IIA chapters.

APR 12 8:30 AM – 4:30 PM **8 CPEs**

How to Perform Integrated Audits for AI-Augmented Business Processes

Transaction cycles now run on predictive models and external AI agents executing business rules without human intervention, and integrated audit methodology has to catch up.

LEARNING OBJECTIVES

- Interview process owners and map AI-driven business process rules to preventive and detective controls.
- Audit data lineage, Model Context Protocol servers, AI agent endpoints, and AI-related vendor risk.

APR 13 8:30 AM – 4:30 PM **8 CPEs**

How to Perform Comprehensive & Cost-Effective IT Audits

Compliance mandates keep expanding while budgets do not, so ITGC coverage has to come from automated, repeatable testing instead of resource-heavy manual sampling.

LEARNING OBJECTIVES

- Evaluate core ITGC domains efficiently, shifting from manual sampling to automated, repeatable audit techniques.
- Build continuous assurance using recertification, configuration drift detection, state verification, and runtime controls.

APR 14 8:30 AM – 4:30 PM **8 CPEs**

Auditing IT Vendor Management

Critical applications now live with hyperscalers, SaaS providers, and subcontractors you never signed with, and autonomous AI agents hold direct access to your systems.

LEARNING OBJECTIVES

- Test the eight vendor management domains, from governance and due diligence through oversight and offboarding.
- Evaluate contracts, SLAs, fourth-party dependencies, LLM training restrictions, and AI disclosure requirements.



Sajay Rai, CISSP, CISM, CPA

More than 30 years in information security, privacy, business continuity and IT audit; he sits on IIA's Professional Issues Committee and the ISACA and IIA Detroit chapter boards.

APR 12 8:30 AM – 4:30 PM **8 CPEs**

Case Study on How to Perform Cybersecurity Audit

Working as lead auditor on a company with unmapped environments, policy gaps, and no vulnerability management, you turn technical findings into risk the executives act on.

LEARNING OBJECTIVES

- Scope a risk-based cyber audit and test logical access, provisioning, and vulnerability scanning data.
- Assess incident response and backup resilience, then report using condition, criteria, cause, effect, recommendation.

APR 13 8:30 AM – 4:30 PM **8 CPEs**

Threat Intelligence and Threat Hunting

Waiting for alerts misses attackers who are already inside, so hunting starts with a hypothesis about adversary behavior rather than a match on an indicator.

LEARNING OBJECTIVES

- Map adversary TTPs with MITRE ATT&CK and the Diamond Model, and formulate testable hunt hypotheses.
- Assess threat intelligence and hunting maturity, pivoting from indicator matching to behavior-based analysis.

APR 14 8:30 AM – 4:30 PM **8 CPEs**

Harnessing AI within Your Enterprise

Generative AI brings risks traditional governance never addressed, including data poisoning, prompt injection, and algorithmic bias, while audit itself can safely use AI for analytics.

LEARNING OBJECTIVES

- Build an AI risk profile covering poisoning, prompt injection, bias, and drift, with continuous monitoring.
- Implement AI governance to NIST AI RMF standards and safely apply AI to audit analytics.

In-Person | Course Guide

April 12–14, 2027 | Onsite learning



Paul Zikmund, CFE, CBCP, CRMA, CAMS, MBA, MAcc, MBEC, CECM

Berkadia's Chief Resiliency Officer, accountable for enterprise risk, compliance, internal audit, privacy and security, after nearly 35 years leading forensic and compliance teams at Fortune 500 companies.

APR 12 8:30 AM – 4:30 PM **8 CPEs**

Business Resiliency: Building an Effective Program

Cyber incidents, supply chain failures and geopolitical shocks test whether an organization bends or breaks; resiliency works only when continuity, recovery, crisis response and third-party risk connect.

LEARNING OBJECTIVES

- Evaluate resiliency programs and business impact analyses against ISO 22301 and NIST to find failure points.
- Design risk-based audits of crisis simulation, incident response and third-party controls.

APR 13 8:30 AM – 4:30 PM **8 CPEs**

Fraud Risk Management: Implementing a Holistic Program

Business email compromise, synthetic financial manipulation and internal collusion outrun reactive investigation, so fraud defense needs assessment, analytics, controls and culture working together.

LEARNING OBJECTIVES

- Construct a fraud risk assessment covering processes, transaction flows and emerging threat vectors.
- Audit anti-fraud controls and whistleblower governance using analytics and continuous auditing against COSO and ACFE guidance.

APR 14 8:30 AM – 4:30 PM **8 CPEs**

Next-Gen Internal Audit: Leveraging Blue Ocean Strategy to Drive Value and Elevate the Function

Compliance-centric audit routines compete for resources while delivering backward-looking assurance; Blue Ocean thinking lets audit drop low-value work and claim uncontested space as strategic advisor.

LEARNING OBJECTIVES

- Apply the Eliminate-Reduce-Raise-Create framework to redefine audit services and target strategic risks.
- Construct an audit value proposition and roadmap that convinces executives while preserving independence.



Paul Claiborne, CIA

A retired Bank of America Senior Vice President and Global Third Party Executive who led 250 professionals overseeing roughly 700 third parties across the enterprise.

APR 12 8:30 AM – 4:30 PM **8 CPEs**

Third-Party Risk Governance and Regulatory Expectations: Building an Effective TPRM Framework

Boards answer for vendors they never meet, and regulators now ask whether third-party governance, policy and risk appetite actually work, not whether they exist.

LEARNING OBJECTIVES

- Explain third-party risk categories and the Board, management and Three Lines roles in governance.
- Assess governance frameworks, policies and oversight reporting against risk appetite and regulatory expectations.

APR 13 8:30 AM – 4:30 PM **8 CPEs**

Third-Party Risk Assessment and Lifecycle Management: Identifying, Evaluating, and Monitoring Third-Party Risks

Risk does not end at onboarding: tiering, due diligence, contract terms, monitoring and fourth-party dependencies decide whether a vendor relationship stays safe or quietly degrades.

LEARNING OBJECTIVES

- Classify and tier third parties, distinguishing inherent from residual risk, and evaluate due diligence quality.
- Evaluate contract provisions, SLAs, performance monitoring, issue escalation, fourth-party oversight and termination practices.

APR 14 8:30 AM – 4:30 PM **8 CPEs**

Auditing Third-Party Risk Management Programs: Developing a Risk-Based Internal Audit Approach

A vendor audit that reviews files instead of controls reassures nobody; scoping by real risk and reading SOC reports critically produces findings management acts on.

LEARNING OBJECTIVES

- Build a risk-based third-party audit plan and test onboarding, contracting and monitoring controls.
- Interpret SOC reports, determine root causes of deficiencies, and report and monitor corrective action plans.

Certification | Review Courses

April 12–14, 2027 | Onsite learning

Advanced in AI Audit (AAIA) Exam Prep

April 12 or **April 13** | **8:30 AM – 4:30 PM** | **8 CPEs**

This course is designed to help participants prepare for the ISACA Advanced in AI Audit (AAIA) certification exam. Led by experienced professionals and current AAIA certification holders, the course covers all AAIA domains through structured instruction, practical exercises, and real-world examples. Participants will strengthen their understanding of key concepts, explore practical applications of AI auditing principles, and develop the knowledge and confidence needed to pursue certification.

Note: Both courses offer the same content over two different days, to allow for a smaller class size.

AAIA INSTRUCTORS



Kyle Miller, CISSP, CISA, CDPSE, QSA, AAIA

Plante Moran's cybersecurity industry champion; co-authored the first edition of ISACA's AAIA Exam Study Guide.



Cooper Dayton, CPA, CISA, AAIA

Six years in IT audit and SOX compliance, now focused on AI risk assessment and audit.

OPTIONAL STUDY MATERIAL AND EXAM PRICING

- **Full Kit — $779:** Includes the Review Manual, Questions, Answers, and Explanations (QAE) database, and exam.
- **Training Kit — $295:** Includes the Review Manual and QAE database.
- **Online review course:** Available for participants who would like additional review after attending our course.
  - Purchased separately — $400
  - Added to another purchase — $375

These study materials and exam vouchers are available through Plante Moran.

CIA Part 1 Exam Prep: Internal Audit Fundamentals

April 14 | **8:30 AM – 4:30 PM** | **8 CPEs**

Thinking about taking the CIA exam, or already studying for Part 1? This workshop covers what you need to know for Part 1: Internal Audit Fundamentals. It follows the current exam syllabus and the IIA's Global Internal Audit Standards.

We'll go through each area the exam tests: the foundations of internal auditing; ethics and professionalism; governance, risk management, and control; and fraud risks. We'll use real-world examples and exam-style practice questions, and we'll talk through why the right answers are right and why the wrong ones can be so tempting. You'll also pick up tips for managing your time and reading questions carefully on exam day.

We'll also cover the practical steps of getting certified: who's eligible, how to apply, how to register and schedule your exam, and which study resources are worth your time.

Who should attend: Internal auditors preparing for the CIA exam, and anyone thinking about earning the certification.

CIA PART 1 INSTRUCTOR



Steve Doyle, CIA, CFE

An Internal Audit Manager at a Fortune 500 company with more than 25 years in internal audit, controls and finance across automotive manufacturing and vehicle finance.

In-Person | Student Education

April 12–14, 2027 | Onsite learning | Open to students

BROUGHT TO YOU BY **Grant Thornton**



Alan Demir, CIA, CPA, CGMA

Risk Advisory Director at Grant Thornton and IIA Detroit chapter leader; specializes in SOX, internal controls and ERP risk.

APR 12 8:30 AM – 12 PM **4 CPEs**

Launching Your Internal Audit Career

Learn how early career choices shape an internal audit path, from industry roles to professional services.

LEARNING OBJECTIVES

- Recognize what to expect during the first six months in internal audit.
- Compare industry and advisory career paths and prepare for recruiting.

BROUGHT TO YOU BY **Deloitte**



Greg Boehmer, CISSP, CIA, CISA, CISM

Deloitte managing director with 23 years of internal audit, cybersecurity and AI governance experience.

APR 14 8:30 AM – 12 PM **4 CPEs**

Building Professional Foundations: Communication, Recruiting, and Career Growth

Business Chemistry, recruiting preparation across the full cycle, and the move from college into professional services.

LEARNING OBJECTIVES

- Leverage Deloitte's Business Chemistry module, which focuses on "Using Science to Improve the Art of Relationships" to help you in your career journey.
- Learn how to: (1) Prepare and deliver a successful interview to secure the offer (2) Understand the steps to help close the interview process to lock in the job and (3) Strategically plan for your professional career via lessons learned from past experiences.



Eric Ringle, MBA

Lecturer in accounting at Michigan Ross and MSU Broad; former Deloitte Risk & Financial Advisory managing director.

APR 14 1 PM – 4:30 PM **4 CPEs**

From Data to Decisions: A Hands-On Data Analytics Challenge

Explore database concepts and queries, then analyze a real-world business case and present data-driven recommendations.

LEARNING OBJECTIVES

- Explain data tables, relationships and basic SQL queries.
- Use Excel to identify findings and communicate results to leaders.

BROUGHT TO YOU BY **KPMG**



Robert Jarakas, CPA

Senior Associate in KPMG's Internal Audit and Controls practice in Detroit, leading operational and compliance audits.

APR 13 1 PM – 4:30 PM **4 CPEs**

Working Smarter with AI: Practical Applications for Future Internal Auditors

Apply responsible AI to research, analysis and internal audit deliverables.

LEARNING OBJECTIVES

- Identify practical AI uses across the audit lifecycle.
- Validate outputs and safeguard sensitive information.

BROUGHT TO YOU BY **PwC**



Brooke Teska, CPA

Manager in PwC's Assurance practice serving public and private entities across Michigan.



Martin Jordan, CA

Manager in PwC's Enterprise Risk and Controls practice in Detroit, specializing in internal audit, SOX and AI.



Emily Hill

Senior Associate in PwC's Enterprise Risk and Controls practice, focused on IT general controls and SOX compliance.

APR 13 8:30 AM – 12 PM **4 CPEs**

Trust, Build, Govern: Internal Audit in the Age of Agentic AI

Explore AI-enabled auditing through practical demonstrations, governance discussion and hands-on exercises.

LEARNING OBJECTIVES

- Examine AI governance and self-healing controls.
- Build dashboards and interactive audit reports.

Virtual | Course Guide

April 19 – May 6, 2027 | Online learning



Don Levonius, MA, BCCLC

A principal consultant, certified coach and facilitator with more than 25 years of leadership experience, including 13 years with Disney, and invited back by over 98% of his clients.

APR 19 8:30 AM – 12 PM **4 CPEs**

Setting Performance Expectations: How to Co-Create Clear Performance Plans

Top-down performance plans written by managers alone rarely change behavior; employees who help build the plan own the outcome, which frees managers to coach.

LEARNING OBJECTIVES

- Apply a five-step interaction process to plan and conduct expectation-setting discussions.
- Shift ownership to employees by securing comprehension, consensus and commitment on desired outcomes.

APR 19 1 PM – 4:30 PM **4 CPEs**

Addressing Poor Performance: How to Manage Underperforming Employees

Underperformers who are never held accountable seldom improve on their own, and the longer a manager waits the weaker the case for action becomes.

LEARNING OBJECTIVES

- Diagnose which of four common root causes explains an employee's underperformance.
- Document discrepancies and apply a five-step process to conduct formal interventions and consequences.

APR 20 8:30 AM – 12 PM **4 CPEs**

Communicating Across Generations: How to Speak to Boomers, Xers, Yers, Zers

Generations are distinct cultures with their own norms and language, and the misreadings between them cost more goodwill than most teams realize.

LEARNING OBJECTIVES

- Raise intergenerational awareness and adapt to Boomer, Gen X, Millennial and Gen Z preferences.
- Speak generational native tongues to improve collaboration across mixed-age teams.

APR 20 1 PM – 4:30 PM **4 CPEs**

Appreciating Generation Z: How to Inspire Your Next Gen Employees

Gen Z is the largest generation in the world and easy to dismiss, yet attracting and keeping them means rebuilding onboarding and the whole employee journey.

LEARNING OBJECTIVES

- Contrast Gen Z attributes with Millennial attributes to target recruiting and engagement.
- Redesign onboarding and the employee journey to enable customization and entrepreneurship.

APR 28 8:30 AM – 12 PM **4 CPEs**

Mastering the Art of Consulting: How to Influence Outcomes without Authority

Anyone asked to improve a situation without authority is consulting, and recommendations get adopted on the strength of the client relationship, not the analysis.

LEARNING OBJECTIVES

- Distinguish internal from external consulting and build client relationships that foster commitment.
- Respond directly to client resistance and present observations and recommendations with confidence.

APR 28 1 PM – 4:30 PM **4 CPEs**

Promoting Civility in the Workplace: How to Recognize and Resolve Incivility

Eye rolling, gossip, exclusion and bullying look minor one at a time, but unaddressed incivility erodes morale, engagement, retention and safety.

LEARNING OBJECTIVES

- Identify uncivil behavior and recognize bullying, mobbing and harassment before it escalates.
- Confront incivility, resolve conflict and false accusations, and analyze organizational civility policies.

Virtual | Course Guide

April 19 – May 6, 2027 | Online learning



Dr. Keith Levick, PhD

CEO of Goren and Associates and author of The Insightful Leader, a psychologist who has spent 25 years applying clinical insight to leadership at General Motors, Mercedes-Benz and MGM Grand.

APR 21 8:30 AM – 12 PM **4 CPEs**

Create an Attitude of Gratitude

Attitude drives thoughts, behavior and well-being, and it shows up on the bottom line, which makes a negative one a business problem rather than a personality trait.

LEARNING OBJECTIVES

- Identify the six elements of attitude and its links to neuroscience and well-being.
- Determine whether you live above or below the line and apply techniques to shift negative attitudes.

APR 22 8:30 AM – 12 PM **4 CPEs**

Creating Your Professional Brand

Every employee already has a reputation that can fuel or derail a career, and most people have never checked what comes to mind when their name is mentioned.

LEARNING OBJECTIVES

- Describe the BRAND model and the benefits of a deliberate professional brand.
- Identify obstacles to rebranding and create ways to present and promote yourself.

APR 26 8:30 AM – 12 PM **4 CPEs**

Leading with Purpose: Inspiring People and Unlocking Potential

People follow leaders they trust, and trust is built through self-awareness, purpose and meaning rather than position, which is where engagement and performance begin.

LEARNING OBJECTIVES

- Identify personal strengths, leadership behaviors and growth areas that affect leadership effectiveness.
- Apply leadership principles that build trust, connect work to purpose and improve engagement.



Dr. Hernan Murdock, PhD, CIA, CRMA

Author of Operational Auditing and Auditor Essentials and former VP of Audit Content at MIS Training Institute, with 25 years training auditors in English and Spanish.

APR 19 8:30 AM – 4:30 PM **8 CPEs**

Essential Soft Skills for Internal Auditors

Technically sound audit work stalls when the auditor cannot hold a difficult conversation, so credibility rests on communication, negotiation, influence and handling conflict well.

LEARNING OBJECTIVES

- Apply verbal and written techniques that overcome communication barriers and build stakeholder trust.
- Use negotiation, influencing and conflict management to gain commitment to audit recommendations.

APR 20 8:30 AM – 4:30 PM **8 CPEs**

Managing and Leading the Internal Audit Function

Governance, risk and technology pressures make running an audit function harder, and the department that only delivers assurance stops being worth its budget.

LEARNING OBJECTIVES

- Draft a strategic plan aligning the audit function with organizational objectives and stakeholder expectations.
- Evaluate resourcing, talent and processes to deliver assurance, advice, insight and foresight.

APR 27 8:30 AM – 4:30 PM **8 CPEs**

Root Cause Analysis

Findings that name symptoms produce issues that come back next year; getting to why a process fails is what makes a recommendation stick.

LEARNING OBJECTIVES

- Apply 5 Whys, fishbone diagrams, process mapping and SIPOC to separate symptoms from root causes.
- Validate conclusions through interviewing and facilitation, then recommend sustainable fixes clients accept.

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Dr. Toby Groves, PhD

An experimental psychologist whose field research and live cognitive experiments with thousands of high-stakes decision-makers examine the quality of professional judgment.

APR 21 8:30 AM – 4:30 PM **8 CPEs**

The Future of Thinking

When AI delivers the facts and the first draft of the reasoning, the advantage shifts to asking the right questions and testing whether the answers hold.

LEARNING OBJECTIVES

- Surface the assumptions AI builds into a conclusion and corroborate its output rather than its explanations.
- Recognize amplification and skill decay, and audit AI through existing risk areas and agent-user controls.

NASBA

APR 22 8:30 AM – 4:30 PM **8 CPEs**

Joint Intelligence

Encoding judgment into rules and metrics produces controls that hold only under planned conditions; a sound division of labor between people and algorithms builds real resilience.

LEARNING OBJECTIVES

- Distinguish complex from complicated problems and allocate framing, relevance and meaning to human judgment.
- Detect over-reliance, aversion and surrogation, and assure opaque AI using NIST AI RMF and ISO/IEC 42001.

NASBA

APR 26 8:30 AM – 4:30 PM **8 CPEs**

Data Science and AI for Non-Data Scientists

You do not need to become a data scientist to be a powerful analyst, but you do need to know where the tools break down.

LEARNING OBJECTIVES

- Describe how predictive models are built, validated and judged for accuracy, reliability and decision use.
- Select appropriate methods, spot thinking and design errors, and use AI to improve professional judgment.

NASBA



Paul Zikmund, CFE, CBCP, CRMA, CAMS, MBA, MAcc, MBEC, CECM

Berkadia's Chief Resiliency Officer, accountable for enterprise risk, compliance, internal audit, privacy and security, after nearly 35 years leading forensic and compliance teams at Fortune 500 companies.

APR 28 8:30 AM – 4:30 PM **8 CPEs**

Cybersecurity Risk Management: Protecting Your Company's Crown Jewels

Auditing IT controls one by one misses the question that matters: whether the handful of assets the business cannot lose are actually protected.

LEARNING OBJECTIVES

- Map critical information assets and audit cyber governance against NIST CSF, ISO 27001 and CIS Controls.
- Evaluate Zero Trust access, encryption, monitoring and incident response, then report risks as business impact.

APR 29 8:30 AM – 4:30 PM **8 CPEs**

Next-Level ERM: Evolving Maturity, Integration, and Strategic Impact

A risk register that sits still is a compliance artifact; ERM earns its keep when risk appetite, KRIs and capital decisions move with the strategy.

LEARNING OBJECTIVES

- Assess ERM maturity and how risk appetite statements drive strategic planning and capital allocation.
- Test KRI and KPI alignment and ERM responsiveness to emerging risks, including AI and geopolitical disruption.

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Kristie Stocker

CEO of Kinetik Edge, an award-winning speaker trusted by Nokia, Bosch and Lockheed Martin to build confident leaders.

APR 27 8:30 AM – 4:30 PM **8 CPEs**

From Stuck to Unstoppable: Find Your Drive. Take Bold Action. Get Lasting Results.

Motivation gets you started, but purpose and momentum keep you going when ambitious goals stall and setbacks pile up.

LEARNING OBJECTIVES

- Apply the Triple M Cycle to identify motivators, sustain momentum and strengthen self-leadership.
- Create achievable goals with milestones and a roadmap for overcoming procrastination and setbacks.



Bill Jelen

Host of MrExcel.com, author of 67 Excel books, and the Excel columnist for Strategic Finance magazine.

APR 26 1 PM – 4:30 PM **4 CPEs**

Microsoft Excel: What's New, Data Analysis, and Agentic AI

Routine Excel work does not have to stay manual; Copilot can be trained with Rules sheets and Skills to clean, shape and summarize recurring data.

LEARNING OBJECTIVES

- Use new Excel features and functions, including stored arrays, FLATTEN, HAS and HASALL.
- Teach Excel and Copilot to clean, shape and summarize recurring data using Rules sheets or Skills.

BROUGHT TO YOU BY **UHY**



Jack Reagan, CPA

A UHY managing director with 40 years in public-sector audit and host of The State and Local Ledger podcast.

APR 21 1 PM – 4:30 PM **4 CPEs**

Internal Audit's Role in AI Governance for Government and Not-for-Profit

AI already shapes how agencies and nonprofits decide, serve and share data, and internal audit must give assurance over it without blocking responsible innovation.

LEARNING OBJECTIVES

- Identify key AI risks and the essential components of an effective AI governance framework.
- Distinguish assurance, advisory and consulting roles while preserving audit independence and objectivity.



Liz Meyers, CPA, CFE, CSM

Partner, IT Risk Advisory at McConnell Jones, LLP with 30+ years in controls, IT and risk-focused business improvement.

APR 22 1 PM – 4:30 PM **4 CPEs**

Internal Audit: Becoming a Trusted Advisor to the Business

Learn how audit teams earn trust by understanding business priorities, focusing on business outcomes and offering useful advice.

LEARNING OBJECTIVES

- Identify what leaders need from internal audit to achieve business objectives.
- Build stronger relationships by focusing on the risks and activities that create value.

BROUGHT TO YOU BY **BDO**



Brian Vazzana, CPA, CITP, CISA

A Principal in BDO's Chicago office and head of its Central Geography Technology Risk Assurance practice, with 24 years in IT general controls, SOC reporting and SOX compliance.

MAY 5 1 PM – 4:30 PM **4 CPEs**

Cybersecurity and AI Changing Organizations

Security incidents keep exposing the same control gaps, and AI adoption is adding new ones faster than governance programs mature.

LEARNING OBJECTIVES

- Recognize common control deficiencies revealed by cybersecurity incidents across industries.
- Apply AICPA, NIST and other AI governance guidance to mature programs and future security audits.

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Danny Goldberg, CPA, CIA, CISA, CGEIT, CRISC, CRMA, CCSA, CGMA

Founder of GoldSRD and co-author of People-Centric Skills, with 26 years in the profession and five spent building internal audit functions from the ground up.

MAY 4 8:30 AM – 4:30 PM **8 CPEs**

Internal Audit: Experienced Internal Audit Training

A year of audit experience is not the same as readiness to lead an engagement, and this closes the gap between doing the work and running it.

LEARNING OBJECTIVES

- Explain the internal audit process and manage an audit engagement end to end.
- Select effective situational communication techniques for client and team interactions.

MAY 5 8:30 AM – 4:30 PM **8 CPEs**

Internal Audit: Keys to Being an Effective Audit Senior

New audit team leaders must supervise and produce audit work on a hectic schedule; this seminar covers reviewing a file, managing a project and drafting audit reports, plus the interpersonal skills to lead the team.

LEARNING OBJECTIVES

- Identify audit risk, select planning tools, and evaluate existing audit documentation.
- Apply team management techniques and execute the audit report creation process.

MAY 6 8:30 AM – 4:30 PM **8 CPEs**

A Deep Dive into Everything AI

AI arrives in audit plans before auditors understand it; a full day grounds you in the technology, its risks, and the frameworks that govern it.

LEARNING OBJECTIVES

- Identify and assess AI and RPA risks using IIA, ISACA and NIST frameworks.
- Apply AI tools to audit work and recommend governance addressing ethical and regulatory requirements.

BROUGHT TO YOU BY **Crowe**



Adam Pajakowski, CIA, CPIM, CFE

A Partner in Crowe's Consulting Practice with more than 20 years across data privacy, internal audit, SOX, enterprise risk and third-party review, and formerly Internal Audit Manager at the Cleveland Clinic.

MAY 6 8:30 AM – 12 PM **4 CPEs**

Today's Healthcare Landscape: Insights for Internal Auditors and Security Professionals

What healthcare clients are actually worried about right now, drawn from live enterprise risk workshops, alongside the standards changes and third-party shifts reshaping how the sector handles data.

LEARNING OBJECTIVES

- Identify the top risks healthcare organizations face, as surfaced in enterprise risk management workshops.
- Assess how IIA standards changes and shifting third-party risk affect quality assurance reviews and data use.

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Alyssa Clarcq, CPA

Internal audit director helping finance teams put AI to work through strong governance, practical controls and repeatable workflows.

APR 29 8:30 AM – 12 PM 4 CPEs

From Death Threats to Damage Control: Internal Audit, the FBI & a Real-World Ransomware War Story

An incident case study follows escalating threats, ransomware, FBI involvement and the recovery decisions internal auditors should examine.

LEARNING OBJECTIVES

- Recognize early signs of an escalating security incident.
- Assess incident response and law-enforcement coordination.

NASBA

MAY 3 8:30 AM – 12 PM 4 CPEs

AI in Action: 10 Hands-On Use-Cases Auditors Can Deploy Tomorrow

Explore practical AI use cases throughout the audit lifecycle, from risk assessment and reporting to task automation.

LEARNING OBJECTIVES

- Apply AI to specific audit tasks with effective prompts.
- Identify appropriate human review and controls for AI-assisted work.

NASBA



Seth Peterson, CIA, CISA, CRMA, CERP

Internal audit director with 20+ years in enterprise risk, technology assurance and IIA board leadership.

MAY 4 8:30 AM – 12 PM 4 CPEs

Third-Party & Supply-Chain Risk: Managing the Risks You Don't Own

Examine governance, monitoring and concentration risk as supply chains and cloud dependencies become more interconnected.

LEARNING OBJECTIVES

- Evaluate third-party governance and risk management approaches.
- Identify concentration exposures and strengthen vendor monitoring.

NASBA

MAY 5 8:30 AM – 12 PM 4 CPEs

Cybersecurity Frontlines: Practical Playbooks to Strengthen Defenses

Explore audit playbooks for AI-enabled attacks, ransomware, identity threats and cybersecurity oversight.

LEARNING OBJECTIVES

- Assess cybersecurity governance and incident readiness.
- Scope risk-based audits and report threats to leadership.

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BROUGHT TO YOU BY **Ernst & Young**



Andrew Twardzik, CPA

A Partner in EY's Risk practice and the firm's Americas Internal Audit Leader, with over 20 years serving multinational SEC registrants and several turns as a Chief Audit Executive.



James Hollingsworth, CMC, CCEP

A Senior Manager in EY's Risk practice with 15 years in IT and OT cybersecurity, security governance and regulatory compliance across power, utilities, oil and gas.

MAY 3 8:30 AM – 12 PM **4 CPEs**

Energy and Industrials Sector Update

Cyber and advanced AI threats are reshaping the risk profile of energy and industrial companies, and internal audit's assurance has to keep pace.

LEARNING OBJECTIVES

- Identify emerging Energy and Industrials sector risks, including cyber and advanced AI threats.
- Evaluate internal audit's role in assuring cyber risk, AI governance and management's threat response.

BROUGHT TO YOU BY **Rehmann**



Kristy Clark, CPA, CIA

A Risk Advisory Principal at Rehmann who leads the firm's Risk Advisory practice and performs external quality assessments against the Global Internal Audit Standards.



Chrissy Walters, CPA, CISA

A Risk Advisory Principal at Rehmann leading its Cleveland market team, formerly Director of Internal Audit at American Greetings and a manager in PwC's Risk Assurance practice.

MAY 4 1 PM – 4:30 PM **4 CPEs**

When the Plant Floor Becomes the Enterprise: Auditing Risk in Modern Manufacturing

Manufacturing risk no longer sits in financial, IT or cyber silos, and auditing the plant floor now means auditing operational technology, supply chain and automation together.

LEARNING OBJECTIVES

- Identify interconnected operational technology, cybersecurity, supply chain and automation risks in manufacturing.
- Challenge existing controls, evaluate resilience and ask sharper questions during manufacturing audits.

Sponsors | Exhibitor Showcase

April 12–14, 2027 | The Henry

The Detroit Chapters of The IIA and ISACA host their annual Spring Conference and Exhibitor Showcase at The Henry. Attendees come to deepen their expertise and to meet the organizations supplying goods and services across governance, IT security, internal auditing and enterprise risk management.

Exhibiting puts your organization in front of the local profession for three days. Past showcases have worked well for exhibitors and attendees alike, and the floor remains a practical way to introduce your products to the Detroit marketplace.

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- Five minutes to speak at a designated lunch

To register, complete the Exhibitor Registration Form. Questions and comments are welcome — please contact either of the committee members below.

Kamilla Williams
kamilla.williams@wayne.edu
(313) 577-6805

Diana McFadden
mcfaddend@michigan.gov
(517) 242-5898

We look forward to having you join us for the 2027 event.

2027 Spring Conference Committee

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