July 22, 2020

How to get Ready for your Annual Meeting Session

Panel sessions
Objectives

• Understand how the platforms being used for Annual Meeting will support your session

• Understand how your session will unfold

• Answer your questions
• **June 11-12:** Hold Spark, what became a pilot for the Annual Meeting

• **June 25:** With just 47 days to plan for the Annual Mtg
  – AAA successfully negotiated release from the hotel contracts, so we could move on transitioning to virtual

• **June 25:** Reached out to Authors and Liaisons with the timeline

• **June 30:** Authors recommitted to present (about 70%)

• **July 1 – July 8:** Liaisons asked to restructure sessions
  – Extended to July 13

• **Still to come:**
  – Finalizing program - communicating with authors - and the rest
Learning from our pilot virtual meeting: Spark

• **Best practice is similar to a “flipped classroom:”** Focus on one-way presentation in the Presentation Gallery, enabling more interaction in the “live” meeting

• **Feedback from Spark** (100 papers, 300 attendees)
  – High satisfaction
  – Improvements
    • Discussants necessary!
    • Have authors provide an overview of their paper for those who haven’t reviewed it in the past

• **Format agreed upon** – which would allow 75% of accepted papers to be presented
  – 4 papers per traditional paper session
  – 5 papers per dialog session

• And include **panels, plenaries, and CTLA**
How will the Annual Meeting work – virtually?

This is still being built!
And Presenters, Discussants, and Moderators will see “behind the scenes”
How will this all happen? Big picture!

• **We are finalizing the program** - and will let you know the time of your presentation by tomorrow

• **Panel presenters will**
  – Provide poll questions for audience response (more on that in a moment)
  – You have the **option** to post an infographic to the Presentation Gallery, hosted by Morressier – or your session will have a title slide with the presentation title and panelists

• **We will create a detailed “script” for the session** – and provide it to all presenters, moderators and discussants (if you are in a traditional concurrent session)
**Key Dates:**

**By July 23**
1. You will know the time and content for your session
   1. Session number
   2. Session title
   3. Time scheduled
   4. Papers and presenters in the session

**By July 26 – OPTIONAL**

A. Submit to the Presentation Gallery
   1. Create Account Profile using the unique link to the AAA Presentation Gallery you received in an email from the AAA. Then you can...
   2. Design and upload your Infographic
   3. Upload any additional materials you would like to share (handouts, papers...) as “data sets”

B. Optional Activity
   1. Submit to the Presentation Gallery
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      2. Design and upload your Infographic
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**By July 28**

A. Register for the meeting
B. Submit your polling questions
   1. Prepare 3 multiple-choice polling questions about your presentation. This will be “activated” in when you specify during your session.
   2. Use the link in the email you received with these instructions – or from the AAA website, on the resources pages

**Week of August 3**
Rehearsal in the platform – AAA will be emailing you to schedule.

**August 10-13**
Look great and arrive 15 minutes early for your session. Enjoy the live Q&A interaction – being recorded so more can benefit!
## Schedule: Program Layout for Paper Sessions – 4 days

### DAY 1

<table>
<thead>
<tr>
<th>Time Slot/Room</th>
<th>Rm 1</th>
<th>Rm 2</th>
<th>Rm 3</th>
<th>Rm 4</th>
<th>Rm 5</th>
<th>Rm 6</th>
<th>Rm 7</th>
<th>Rm 8</th>
<th>Rm 9</th>
<th>Rm 10</th>
<th>Rm 11</th>
<th>Rm 12</th>
<th>CTLA 1</th>
<th>CTLA 2</th>
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<tr>
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</tbody>
</table>

### Legend

- **Concurrent regular, dialogue and panel sessions**
- **CTLA sessions**
The Presentation Gallery

AAA 2020 Virtual Annual Meeting and Conference on Teaching and Learning
August 7-13, 2020 · Virtual edition
Annual Meeting Website
Benefits for Presenters

Client Consulting
Opportunities and the Reemergence of Big 4 Consulting Practices:
Elizabeth N Cowie
Big 4 Consulting · Audit Market Structure

Labour Adjustment
Strategies and Performance.
Dongning Yu
Labour management · Labour adjustment

The Effect of Enforcement on Auditor Conservatism.
Mareike Peters-Olbrich
Auditor conservatism · Audit quality

In Forming Views of Information in Interviews
Daniel Shallcross
Interviews · Professionalism

Managerial Ability and Firm Performance: A Labour Management Perspective.
Dongning Yu
Managerial ability · Labour investment

Analysts' EPS Forecasts: The Effects of Forecast Uncertainty and Forecast Precision on Investors'
Clarence Goh
Earnings forecasts · Analysts' forecasts

CEO Excess Compensation:
How the Managerial
Adoption of Clawback
The AAA will submit a title slide to the Presentation Gallery

Panel on Research Relevance

Moderator:
Elaine Mauldin, University of Missouri
https://business.missouri.edu/departments-faculty/people-directory/elaine-g-mauldin

Panelists:
Steven Kachemeyer, University of Texas Austin
https://www.mccombs.utexas.edu/Directory/Profiles/Kachemeier-Steven

Dawn Matsumoto, University of Washington
https://foster.uw.edu/faculty-research/directory/dawn-matsumoto/

Terry Shevlin, University of California Irvine
https://merage.uci.edu/research-faculty/faculty-directory/Terry-Shevlin.html
The Role of Assurance in Equity Crowdfunding

Evisa Bogdani

Abstract | 79 Views

Overview
We examine whether assurance facilitates capital formation in equity crowdfunding market.

Equity crowdfunding refers to the process of raising capital by selling securities through the internet to a large number of investors. The SEC requires companies to disclose financial statements but.

Main Findings
Startups that choose to hire an independent CPA:

➢ Are 81% more likely to achieve their target fundraising vs startups that only provide management-certified financial statements.

➢ Attract 81% more investors.

➢ Raise 69% more funds, over and above the target level.

Investors do not differentiate between companies that provide reviews relative to those that do not.

Results H1
Management Certification / CPA_Engagement

<table>
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<tr>
<th></th>
<th>Success</th>
<th>Assurance</th>
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<tbody>
<tr>
<td>Pr_Success</td>
<td>0.594*</td>
<td></td>
</tr>
<tr>
<td>Amount of Funds</td>
<td>0.528***</td>
<td></td>
</tr>
<tr>
<td>Excess Funds</td>
<td>0.915**</td>
<td></td>
</tr>
<tr>
<td>Number of Investors</td>
<td>0.594***</td>
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</table>

Results H2
Audit vs Review

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<th>Review</th>
<th>Audit</th>
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<tbody>
<tr>
<td>Pr_Success</td>
<td>0.585*</td>
<td>0.753</td>
</tr>
<tr>
<td>Amount of Funds</td>
<td>0.508***</td>
<td>0.876***</td>
</tr>
<tr>
<td>Excess Funds</td>
<td>0.887***</td>
<td>1.287***</td>
</tr>
</tbody>
</table>

Evisa Bogdani*, Monika Causholli*, W. Robert Knechel*
*University of Kentucky, †University of Florida
raising capital by selling securities through the internet to a large number of investors. The SEC requires companies to disclose financial statements but allows to choose the assurance level: certification by management, or an audit or review by an independent accountant.

- Attract 81% more investors.
- Raise 69% more funds, over and above the target level.

Investors do not differentiate between companies that provide reviews relative to those that provide audits.

### Results H2

<table>
<thead>
<tr>
<th>Variable</th>
<th>Review</th>
<th>Audit</th>
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<tbody>
<tr>
<td>Pr_Success</td>
<td>0.585*</td>
<td>0.753</td>
</tr>
<tr>
<td>Amount of Funds</td>
<td>0.508***</td>
<td>0.876***</td>
</tr>
<tr>
<td>Excess Funds</td>
<td>0.887***</td>
<td>1.387***</td>
</tr>
<tr>
<td>Number of Investors</td>
<td>0.549***</td>
<td>0.963***</td>
</tr>
</tbody>
</table>

**Key Words:** equity crowdfunding, assurance, audit, reviews, capital, startups, finance

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Video Presentation
Video Presentation

The Role of Assurance in Equity Crowdfunding

Evisa Bogdani -- University of Kentucky
Monika Causholli -- University of Kentucky
W. Robert Knechel -- University of Florida
Poll questions for the audience

- 3 multiple choice questions
  - For CPE certification
  - For audience engagement
- They don’t require right/wrong answers
  - Could ask what they’re experiencing, their perceptions are...

INFÓGRAPHIC / POSTER RESOURCES

The Infographic/Poster for your presentation should be prepared using 16 points font or larger and saved as a pdf. The Infographic will be the visual first impression of your presentation in AAA's Presentation Gallery. It should feature the highlights of your presentation. Resources, templates, and examples are available on this page to help you craft your infographic.

During your uploading process to AAA's Presentation Gallery, you will be asked to upload your infographic, your short video, a brief description/abstract of your session, key words/hashtags for your presentation, plus any other materials you want to share (i.e., working paper, presentation slide deck, handout, dataset, website url, tools list, etc.).

You can post updates/revisions in AAA's Presentation Gallery until July 21.

**Paper Presenters**
Submit your Poll Question [Here](https://aaahq.org/Meetings/2020/Annual-Meeting/Presenter-Resources-Infographic)

**Dialogue Presenters and CTLA Presenters**
Submit your Poll and Moderator Questions [Here](https://aaahq.org/Meetings/2020/Annual-Meeting/Presenter-Resources-Infographic)

**Panelists**
Submit your Poll Questions here: [LINK COMING SOON](https://aaahq.org/Meetings/2020/Annual-Meeting/Presenter-Resources-Infographic)

**Morressier Submission Process Instructions**
[Click Here](https://aaahq.org/Meetings/2020/Annual-Meeting/Presenter-Resources-Infographic) for a overview of your infographic gallery setup
Preparing for your session

• As you would for an in-person meeting, work with all of the panelists to develop your questions, presentations, discussions

• In the session you will have
  – Everyone will be broadcast, in grid view
  – Panelists can share their screens
  – Audience members will be able to use the chat and Q&A widgets to engage with the panel
## Panel Sessions

**Session Template: Concurrent Dialogue Session (60 minutes)**

**Session Title:**
- Date:
  - Time slot (eastern): Start

**Room Setup**
- Zoom default mode: Active Speaker View
- Poll, Chat, Q&A

**NOTE:** Yellow highlight is showing what each author will provide (when this goes to them, they’ll see their responsibilities)

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Poll?</th>
<th>Activity</th>
<th>People</th>
<th>URL</th>
<th>Files</th>
<th>Share Screen or CMI Projects?</th>
<th>Poll Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>-15</td>
<td></td>
<td></td>
<td>Make title screen active for attendees</td>
<td></td>
<td></td>
<td>Title Screen</td>
<td>CMI projects</td>
<td></td>
</tr>
<tr>
<td>-15</td>
<td>-5</td>
<td></td>
<td>Meet in the Green Room</td>
<td>All 5 presenters and the moderator</td>
<td>Zoom URL</td>
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<tr>
<td>-5</td>
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<td>Tech moves all presenters to live room: All Speakers muted Sound to audience is off</td>
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<tr>
<td>-2</td>
<td>+3</td>
<td>Q1</td>
<td>Activate – keep active until + 3</td>
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<td></td>
<td>Chime + CMI Activates</td>
<td>Are you planning on attending all of this session? Yes/No</td>
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<td>Countdown from Staff When live, sound to audience is on</td>
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<td>Video</td>
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<td>Housekeeping video</td>
<td>CMI Runs</td>
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<td>Welcome</td>
<td>Moderator</td>
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<td>Title slide – Papers and authors</td>
<td>CMI Runs</td>
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**Paper 1 Discussion:** *Title, Presenter*
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<th>Poll?</th>
<th>Activity</th>
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<th>URL</th>
<th>Files</th>
<th>Share Screen or CMI Projects?</th>
<th>Poll Question</th>
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<tr>
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<td>+12</td>
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<td>Panelist 1 overview</td>
<td>Panelist 1</td>
<td>Potentially PowerPoint Slides</td>
<td>Presenter shares screen</td>
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<td></td>
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<td></td>
<td>Q2: Panelist 1 asks question – keep active 2 minutes</td>
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<td>Provided by panelist 1</td>
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<td>+12</td>
<td>+22</td>
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<td>Panelist 2 overview</td>
<td>Panelist 2</td>
<td>Potentially PowerPoint Slides</td>
<td>Presenter shares screen</td>
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<td>Q3: Panelist 2 asks question – keep active 2 minutes</td>
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<td></td>
<td>Provided by panelist 2</td>
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<tr>
<td>+22</td>
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<td>Potentially PowerPoint Slides</td>
<td>Presenter shares screen</td>
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<td>Q4: Panelist 2 asks question – keep active 2 minutes</td>
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<td>Provided by panelist 3</td>
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## Option 2: Interactive Discussion

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<td>Speaker or Grid view?</td>
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<td>Moderator asks for poll question to be activated – keep active 2 minutes</td>
<td></td>
<td></td>
<td>Chime + CMI Activates</td>
<td>Moderator provided question</td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td></td>
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<td>Chime + CMI Activates</td>
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<tr>
<td>Q4</td>
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<td>Moderator asks for poll question to be activated – keep active 2 minutes</td>
<td></td>
<td></td>
<td></td>
<td>Moderator provided question</td>
<td></td>
</tr>
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August 10-13
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Thanks for being part of the Virtual Annual Meeting -

We are learning together, and it will make a difference!
Questions?

If you think of more, email Stephanie Glaser
stephanie@aaahq.org