

# Monday, June 10 2019

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6/10 1:30PM–2:45PM

## **ENG19K01. The Fat Tail: The Power of Political Knowledge for Strategic Investing**

**Ian Bremmer** - *President & Founder, Eurasia Group*

The fallout from the still-unfolding global financial crisis provides several perfect examples of "fat tail" risk, those that flow from the low-probability, high-impact events that generate upheaval more often than we think. Bremmer shares with audiences how an understanding of the political dynamics generated by the financial crisis helps us forecast market risks, why politics matter more than ever for market performance, why the world's wealthiest countries have begun to behave like emerging market states, and what all this means for investors and companies.

At this presentation audiences will learn:

- 1) The risks that flow from low-probability, high-impact events...like the global financial crisis
  - 2) Why politics matter more for the performance of markets and for issues ranging from defaults to nationalization to regulatory reforms
  - 3) Why developed states are behaving more like emerging markets
  - 4) The shift from New York, Shanghai, and Mumbai to Washington, Beijing, and Delhi—and the risks that this trend creates
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# Tuesday, June 11 2019

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6/11 8:00AM–8:05AM

## **AAM1900. Welcome/AAM Summit Kick-off**

6/11 8:05AM–8:55AM

## **AAM1901. Curiosity: How to Stay Calm Amid Uncertainty**

**Matt Newman** - *Consultant, The Frontier Project*

Initiate honestly. Respond without judgement. Build together without an end in sight.

These mindsets can get you back on track when new information arises to totally negate all your plans and assumptions. They can help you project presence and confidence in an uncertain situation. And they all come straight from the long tradition of improvisational performers—better known as improv comics.

The rate of change in today's workforce is increasing exponentially. Research indicates that modern companies go through substantial organizational changes every three years. The average workforce undergoes a complete turnover every eight years. The life-cycle of products and US patent filings is getting shorter. And all this increased speed is making itself felt in our everyday experience.

Matt will show you how using an improviser's iterative mindset can increase your tolerance for change, lead to more productive conversations, foster creative teams, and generally make you more comfortable and confident when you have no idea what will happen next.

Using lessons learned from nearly two decades performing in front of crowds without a script, Matt will share stories and inspiration from unusual places to awaken your own sense of curiosity about the changing world around you.

He's also going to ask someone from the audience to get on stage. You've been warned.

Initiate honestly. Respond without judgement. Build together without an end in sight.

Learn how using an improviser's iterative mindset can increase your tolerance for change, lead to more productive conversations, foster creative teams, and generally make you more comfortable and confident when you have no idea what will happen next.

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6/11 8:55AM–9:05AM

## **AAM1902. State of AAM**

**Craig Browning** - *Director of Marketing and Personnel, KWC Certified Public Accountants*

**Jennifer Lemanski** - *Senior Manager, PKF Texas*

AAM's President and President-Elect will recap the organization's accomplishments during the past year, introduce new board members and discuss initiatives for the year ahead with video highlights.

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6/11 9:05AM-9:55AM

## **AAM1903. Inside the Mind of the Managing Partner: Marketing That Really Matters**

**Carl George** - CEO, *Carl George Advisory, LLC*

As the CEO of Clifton Gunderson for 16 years, I was privileged to work with many partners and staff that understood the dynamics of marketing to our current clients, to prospective clients, and to clients that were previously lost. This session will focus on lessons learned and best practices in executing on those three dynamics. In addition, the session will address successful marketing training techniques for the rising staff stars in your firms.

Learning Objectives:

- 1) To obtain a clear understanding of the constant need to market to current clients, future clients, and to former clients.
- 2) To provide current successful marketing training techniques for the firm's staff.
- 3) To provide marketing lessons learned and best practices from the MP's perspective.

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6/11 9:55AM-10:20AM

## **AAM1904. How Much Should You Spend on Marketing: Results of AAM's 2019 Marketing Budget Survey**

**Lee Frederiksen** - Managing Partner, *Hinge*

AAM partnered with the Hinge Research Institute to conduct their third bi-annual study of marketing budgets within CPA firms. In this session, the Managing Partner of Hinge Lee Frederiksen will uncover insights from the research, help attendees benchmark their marketing budgets against high-growth and average-growth firms, and provide guidance on building an effective marketing budget.

Learning Objectives:

- 1) Learn how high-growth and average-growth accounting firms budget marketing expenses.
- 2) Learn which marketing techniques are more effective for accounting firms
- 3) Benchmark your firm's marketing budget against high-growth and average-growth firms.

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6/11 11:20AM-12:10PM

## **AAM1905. Content for Conversion**

**Christine M Nelson** - Senior Communications Consultant, *Ingenuity Marketing Group, LLC*

One of the hardest stages for content marketing is the Decision stage – actually converting visitors to take action on an offer or to request an RFP. This session will focus on strategies to improve conversion, including identifying the actions that you want visitors to take once they arrive at your site and the gaps you may have in your campaigns that fail to move potential clients from Awareness and Consideration to Decision. We will use examples of actual campaigns to help participants map out their own inbound marketing strategy for conversion, discuss follow-up touches that bring buyers back to the table, and determine when it's timely to have partners engaged in outreach and closing.

Attendees will leave with an inbound marketing strategy map that focuses on the right conversion tactics for their firm.

Deep dive and creation of content that applies to the conversion stage of inbound marketing

Fill gaps in the inbound marketing approach that support conversion and real prospects

Tie marketing efforts to conversion ROI to justify digital focus

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6/11 11:20AM-12:10PM

## **AAM1906. Accountability and Consistency Developing and Executing on an Internal Sales Process**

**Dawn Howard** - Region Industry Development Leader, *BKD, LLP*

This presentation will be focused on developing and executing on a strong sales pipeline process. The 'billable hours shield' is alive and well as it relates to the time our client service professionals are willing to put to their business development efforts. Key points of this presentation include setting up a consistent and efficient follow up plan with a focus on holding people accountable as they build their sales pipeline. This presentation will also discuss a methodology to limiting the number of key prospects per client service professional and an example of a marketing campaign and process utilized to improve your win rate.

After attending this presentation, attendees should be able to:

- 1) Assess their own current business development process and determine in what areas, as it relates to holding their client teams accountable, they need to tighten up the process.
- 2) In addition, attendees should recognize instances where it is time to escalate any concerns to their executive team.
- 3) Finally, attendees should be able to use the example of a marketing campaign and construct one of their own or infuse their own plan.

6/11 11:20AM-12:10PM

## ENG1909. Uncovering Unconscious Bias (EDG, PST, AAM)

**Lindsay Stevenson** - Vice President - Finance & Tax, 1st Financial Bank USA

**Rebekah Brown** - Director of Development, MACPA/BLI

Is unconscious bias hindering you, your team or your organization? Unconscious bias is bias that happens automatically. It is triggered by our brain making quick judgments and assessments of people and situations based on our background, cultural environment and personal experiences. Have you ever arrived home from work and don't remember the drive at all? Or perhaps you moved, but drove to the old house on your way home. Once neural pathways are formed, like your daily commute, they become almost automatic. We don't spend time thinking about each turn on the way home, our body just does it. While this can be helpful for remembering your route home, it can be detrimental in other areas of our lives. In this session we will explore these biases, how they might be hurting, us, our team and our organization and what we can do to create new neural pathways and combat unconscious bias.

Learning Objectives:

- 1) Define unconscious bias Identify the unconscious biases that might be driving you
- 2) Create an action plan to combat the unconscious biases in you, your team and your organization

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6/11 11:20AM-12:10PM

## ENG1910. GDPR - An Increase in North America Privacy - Are you in Compliance? (PST, AAM)

**Thomas Patterson** - Senior Director, NTT Data Services, Inc.

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6/11 1:25PM-2:40PM

## AAM1907. How to Conquer the Podcast Game: ENGAGE Your Audience & Invigorate Your Brand

**Becca Davis** - Director of Practice Growth, Rea & Associates, Inc.

In this session, attendees will learn how Rea & Associates developed an engaging, award-winning podcast -- before podcasting was cool. We'll cover how a podcast can help invigorate your brand, make your people famous, form meaningful conversations and build trust and credibility with the people you want to reach, and streamline your content strategy.

You'll learn how Rea launched its podcast, unsuitable on Rea Radio, and the lessons we learned along the way. We'll share our internal and external promotion strategy and the tools and equipment you need to get started. If you've been considering podcasting as a strategy, you don't want to miss this fun and engaging session.

The session will cover the how and why of starting a podcast and attendees will learn:

- 1) Why a podcast/selling to your firm
- 2) Pre-launch objectives
- 3) Launch date promotion
- 4) Keeping it fresh
- 5) Overcoming obstacles
- 6) Our top lessons learned
- 7) Using as a content hub
- 8) How we work smarter, not harder
- 9) Top tools/equipment used
- 10) Skill sets required

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6/11 1:25PM-2:40PM

## AAM1908. Party of One: Maximizing Your Impact as a Solo Firm Marketer

**Anne Angera** - Director of Marketing, DunlapSLK

Solo firm marketers are continuously pulled in many different directions, filling multiple roles and wearing many hats. Where should you focus your limited time and resources to maximize your impact for the firm? This session will help you think strategically to direct your talents to those areas that will yield meaningful results for firm management, enhance your visibility and credibility within the firm, and directly impact the firm's team members and bottom line. Sharing lessons learned from more than 26 years working as a solo firm marketer, along with best practices from other solo firm marketers and industry experts, the goal is for participants to leave this session with a renewed focus and a specific action plan geared toward activities yielding the greatest results.

Participants will learn how to apply strategic thinking to align their goals with those of firm management. Focusing on the AICPA's "Top Five Issues," participants will be provided with specific examples of how marketing can play a role in each of these areas. Sharing personal experiences and the experiences of others in the industry, the goal is for participants to leave with tangible ideas for programs and projects that can be tailored for their unique situations and help them directly impact their firms and, ultimately, their careers. Participants will learn how to think "big picture" and establish themselves as an important resource for their firms beyond the marketing function.

Key takeaways will be in the form of action plans and ideas for customizing and implementing at the participant's firm. This is a critical-thinking, idea-sharing, and problem-solving session geared toward generating thoughts on how to make examples and experiences shared work for everyone in their own unique situation.

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6/11 1:25PM-2:40PM

## **AAM1909. Marketing and Sales: Two Disciplines, One Process**

**Daniel Scott Moore** - *Shareholder & EVP, The Rainmaker Companies*

Thirty years ago, the AICPA revised its Code of Ethics to allow advertising, and accounting marketing was born. Ever since, firms have wrestled with how to link marketing investments to tangible sales results. Today we look across the industry and find no shortage of sophisticated marketers blazing trails. However, the challenge to align marketing and sales continues to perplex many growth leaders.

Most definitions of marketing and sales place one before the other in a continuum, rather than each in its own silo. There is a relay, although there isn't a distinct handoff. Rather, the two functions continually support each other. Herein lies the key to true integration: Align all marketing and sales roles and responsibilities along a single, unified client development process.

Participants will be provided with a 'Marketing and Sales Alignment Guide' with a summary of key points that can be used for future reference.

Participants will explore and learn:

- 1) the distinctions and connections between the marketing and sales functions
- 2) a five-phase client development process and the role of each function across the phases

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6/11 3:40PM-4:30PM

## **AAM1910. Driving Event Attendance**

**Ronelle Sellers** - *Director of Marketing, Henderson Hutcherson & McCullough, PLLC*

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6/11 3:40PM-4:30PM

## **AAM1911. Rise of the AI Marketing Machine - Driving Growth in Accounting Firms**

**Becky Livingston** - *President & CEO, Penheel Marketing*

AI has made it possible for marketers to accomplish tasks they've been talking about for decades. In this presentation, I'll discuss how you can tackle three essential firm-growth goals, including marketing campaign performance, sales and revenue impact, and customer loyalty, using AI resources. Leveraging crowd-sourced knowledge, they'll be examples of how to increase efficiencies and to unify data from disparate sources, automate and future-proof data models for scale, and reduce optimization cycles.

Learning Objectives:

- 1) Identify AI tools to help you increase efficiencies within your firm and impact growth
- 2) Plan your strategic approach to tackle the three, essential firm-growth goals
- 3) Pinpoint crowd-sourced information to make informed decisions

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6/11 3:40PM-4:30PM

## **AAM1912. Negotiate to Win**

**John Meislahn** - *Director of Business Development, Pisenti & Brinker LLP*

Americans are inherently the worst negotiators in the world. Our culture does not support the bartering and bargaining that takes place in other countries. In this presentation you will get a short history of the negotiation process and then you will be provided with 21 steps to help you be a better negotiator.

The goal of the presentation is to have the participants walk away with basic negotiation skills that can be used in all aspects of their daily life. Whether you are negotiating pricing with a prospect, a hotel upgrade on your vacation or just bargaining with your children....this material will give you a head start.

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6/11 4:45PM–6:00PM

## AAM1913. Communication on Point: Successful strategies for paid social media campaigns

**Melissa Harrison** - CEO, Allee Creative

Communication is at a crossroads and this includes the digital space. Organic or paid? Influencer marketing or from the brand? Regardless of where you net out, your brand deserves to be in the spotlight. Gone are the days of relying solely on organic content—the best communicators are executing solid paid digital strategies on social media and beyond. From Facebook boosted posts and targeted ads to Twitter campaigns—each comes with its own parameters for reaching niche audiences and expanding brand reach. If you haven't established a paid social media strategy, this is your next move. We'll cover what to track, how to track it, and the most effective way to set up your information to be understood and analyzed by key decision makers in your company.

Learning Objectives:

- 1) Participants will understand the digital channels that are most effective for paid campaigns and how to best use their time in developing those for their audience.
- 2) Participants will be able to organize a paid digital media strategy from start to finish - creating content, scheduling and planning, and analyzing stats.
- 3) Participants will understand the how, why and how often to track results and how to tie them to your brand's overall growth goals.

6/11 4:45PM–6:00PM

## AAM1914. Building an Optimal Customer Experience and Effective Customer Journeys

**Peg McIntyre** - VP Membership, Association of International Certified Professional Accountants

**Cheryl Wipper** - VP - Communications, Reputations & Brand, Association of International Certified Professional Accountants

Nearly 80% of organizations think they are providing a positive customer experience but customers disagree. Barely 10% of customers feel as if they are being served well. Customer experience is the new brand building—how you interact with customers at every level, from websites to phone conversations to meetings is driving customer value and your bottom line success. How can you determine if you're doing a good job with your clients, if your services are valued, if you have an opportunity to upsell? Customer experience is the new competitive frontier to increase satisfaction, loyalty and advocacy. Learn how to conduct an experience study and get examples of what you might learn about your customers and your company.

Learning Objectives:

- 1) Learn how to conduct an experience study
- 2) Learn how to become an experience-focused organization.

6/11 4:45PM–6:00PM

## ENG1917. Communicating Value and Pricing to Clients (PST, AAM)

**Michelle Golden** - President, Fore LLC

Experience The Power of Pricing in Advance. In this practical, information-packed session, unpack three big concepts within Michelle's advanced Pricing Methodology(SM). Learn the rationale behind each, then discover multiple ways to leverage the power of pricing to improve growth, elevate your worth, and deepen customer loyalty.

Key Concepts:

- Why & How to Provide Certainty in Price
- Ways to Better Understand the Customer
- Customer-Centric Positioning for Max Effectiveness

Attend this session and gain competitive advantage:

- 1) Explore the psychological and financial benefits when you provide tiered, 3-option pricing in advance
- 2) Learn how to bring more impactful, truly holistic approaches (can you say effective cross-selling?) without being pushy
- 3) Discover how to break out of the "just a vendor" role to be a true business-advisor role from day 1 of a client relationship

# Wednesday, June 12 2019

6/12 8:00AM–9:15AM

## ENG19K02. Professional Update

**Barry Melancon** - CEO, Association of International Certified Professional Accountants

**William Reeb** - CEO, Succession Institute, LLC

6/12 9:40AM–10:30AM

## **ENG19K03. Leading Through Organizational Transformation – A Conversation With Simon Sinek**

**Simon Sinek** - *Author & Speaker*

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6/12 11:30AM–12:45PM

## **ENG1920. Engaging NextGen Clients (PST, AAM)**

**Jennifer Wilson**

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6/12 11:30AM–12:45PM

## **AAM1915. 8 Simple Techniques To Grow Your Business With Video Marketing**

**Antoine Dupont** - *CEO, Katapult Marketing*

Video marketing is taking consumers by storm because it engages customers and prospects and helps convert them into buyers. Recent statistics show that video content is not only effective, but the demand for it has grown at a rapid pace. According to Hubspot, 43% of people want to see more video content from marketers and companies that use video in their email marketing, see a 5x higher open rate and 8x open-to-reply rates. Cisco also forecasts 80% of all consumer internet traffic will be videos by 2020. With these kind of stats, don't you think it's time to learn more about video marketing?

Learning Objectives:

- 1) How to create a high-quality video with a small budget
  - 2) The best marketing channels to promote your video
  - 3) How to generate endless sources of content
  - 4) Shattering myths and bad habits
  - 5) How to produce content your audience cares about
  - 6) Where to post and promote your content
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6/12 11:30AM–12:45PM

## **AAM1916. Marketing's Important Role in Building a CPA Firm's Consulting Practice**

**Carrie Steffen** - *President, Co-Founder, The Whetstone Group*

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6/12 1:55PM–2:45PM

## **AAM1917. Track This, Not That - Digital Marketing Metrics Your Managing Partner Will Actually Care About**

**Bob Goricki** - *Director of Digital Marketing, Skoda Minotti Strategic Marketing*

Today's digital marketing tools give us access to a tremendous amount of data on our marketing efforts. What these tools do not give us is more time in front of our managing partner to share our treasure trove of insights. We need to keep it simple and keep it relevant. This presentation covers the best digital metrics to catch your managing partner's attention. Discussion topics include:

- The importance of blog article Entrances compared to total Page Views
- Tracking clicks generated by keyword-specific search results and not just keyword rankings
- The relevance of paid search cost per conversion compared to cost per click

Focusing on the right metrics will result in time well spent with your managing partner and better demonstrate marketing's value to the firm.

Attendees will receive access to a marketing metrics dashboard PowerPoint template.

Learning Objectives:

- 1) Gain a basic understanding of key digital marketing metrics.
  - 2) Learn how to create relevant dashboard reports to summarize and present your digital marketing metrics.
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6/12 1:55PM–2:45PM

## AAM1918. Five Firms in Six Years - This Isn't Kansas Anymore

**Joe Kovacs** - Director of Marketing and Business Development, Councilor, Buchanan & Mitchell P.C. (CBM)

**Peter Reilly** - President and Managing Partner, Councilor, Buchanan & Mitchell P.C. (CBM)

Merging a new practice into an accounting firm has a huge impact on the acquiring firm's culture, delivery systems, professional development, business development philosophy, marketing, and internal communication and technology processes. It challenges individuals' sense of identity, morale and their understanding of their professional roles. While the acquisitions of larger firms usually make industry headlines, it is the smaller and mid-sized firms who are the most changed on every level. CBM has successfully integrated five firms over six years (including one in late 2018), in the process doubling the number of the firm's professionals, adding new practice areas and adopting new technologies and staffing structures. CBM is who we all are now. Join Managing Partner Peter Reilly and Marketing Director Joe Kovacs to learn more about how to succeed during such significant organizational change.

In an era of increasing mergers and acquisitions, the leadership from firms across the country—and internationally—are deciding to adopt practices and other firms that contribute to shorter term growth and longer-term positioning. Managing partners and marketing leaders attending this session will learn about areas of responsibility and decision-making, technology integration, new staffing structures, the absorption of marketing practices or the adoption of new ones, and the critical importance of internal communications to ensure that, despite the fears and challenges associated with organizational change, the end result can be successful and lead to a more financially successful organization with new resources and capabilities to serve the firm's target markets.

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6/12 1:55PM–2:45PM

## AAM1919. Optimizing Your Role as a Business Development Professional

**Jason Jobgen** - Director, BKD,LLP

How do you optimize a business development position? Whether you are a business development professional who wants to provide maximum value to your firm or a firm leader who wants to get the most out of your sales professional, aligning the interests of the firm and the sales person is imperative to success.

Over the last 16 years Jason Jobgen has led sales teams and managed practices at BKD, LLP. During this session Jason will discuss the major disconnects he has seen in our industry between firm leadership and business development executives. The session was designed for CPA firm business development executives but the content is also appropriate for those managing sales people or considering an investment in sales resources.

Learning Objectives:

- 1) Understand firm drivers behind growth
- 2) Align a business development role with firm expectations and goals
- 3) Overcome common challenges of the BD role
- 4) Align incentives and compensation with desired outcomes

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6/12 3:00PM–3:50PM

## AAM1920. Coaching Teams & Individuals to Maximize Performance

**Adelaide Ness** - Executive Vice President, The Rainmaker Companies

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6/12 3:00PM–3:50PM

## AAM1921. Let Your Clients Tell Your Story: Getting Great Testimonials

**Christine M Nelson** - Senior Communications Consultant, Ingenuity Marketing Group,LLC

**Dawn Elizabeth Wagenaar** - Principal, Ingenuity Marketing Group LLC

How do you get clients to say more than, 'They are responsive,' or 'They provide great, quality service'? In this session, learn the interview techniques and active listening skills that get real stories from your clients to differentiate your firm. We highlight our experience from hundreds of client interviews over more than a decade. You will learn how to ask for the interview, create the right questions, listen for telltale signs of dissatisfaction that can retain a straying client, and secure an approved, 'wow' testimonial or case study for marketing.

Learning Objectives:

- 1) Messaging to get partner support if necessary
  - 2) Develop your process for asking busy clients to be interviewed and make them feel special
  - 3) Key questions that get better answers during the interview
  - 4) How to craft the transcript into a 'wow' testimonial that clients will approve
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6/12 3:00PM-3:50PM

## AAM1922. Building and Scaling Your Marketing Team

**Rhonda Maraziti** - CMO, Withum Smith + Brown, PC

Building a high-performing team to match the needs of your growing Firm can be an exciting yet daunting journey. Join Rhonda Maraziti, Chief Marketing Officer with Withum, as she shares her story of starting at the bottom of the Marketing Department ladder 13 years ago as part of a team of four in one office, working her way up to leading a dynamic team of 22 marketing professionals in six major financial centers. She will also share the key elements of building and adding talented marketing team members to accommodate your Firm's vision for growth and the ever-changing demands of technology.

Attendees will learn:

- 1) Different types of departments within the Marketing Department, and what the expectations are in these roles;
- 2) When to create 'specialists' versus 'generalists'... even in Marketing;
- 3) Strategies to help build trust in each other and in the team's purpose;
- 4) How to be an advocate for your team, even with work/life balance.

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6/12 4:50PM-6:05PM

## AAM1923. Google 2019: What You Need to Know

**Danielle Leitch** - Executive Vice President, MoreVisibility

As Google continues to dominate the customers digital journey, as well as provide valuable resources for marketers, make sure you are up to date on the latest and greatest. In this session, we will explore what every firm should have their Google Toolbox. Topics covered will include:

- Full-funnel marketing opportunities in Google Ads
- Effective targeting strategies
- Leveraging Google Analytics for ROI
- Establishing meaningful KPIs
- What's Next from Google? - Voice Search, Behavioral Marketing and more!

Learning Objectives:

- 1) Gain deeper understanding of the hottest topics in Google brands should be considerate of now and as they strategize for 2019.
- 2) Learn actionable takeaways to help brands to leverage the most sophisticated options and predictive tools within Google to meet users' needs early and often – including before they even begin to search.

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6/12 4:50PM-6:05PM

## AAM1924. Inclusion as a Brand Advantage

**Joanne Y. Cleaver** - President, Wilson-Taylor Associates Inc.

Inclusion shapes firm reputation; can open new business relationships; and can further relationships with existing clients – if it is done right. The Accounting MOVE Project has converted the business case for inclusion to business results since 2010. Here are best practices that drive "return on inclusion" to capture the potential 'diversity dividend' for reputation, growth, retention and firm value, and case studies from major firms that show real results.

Learning Objectives:

- 1) Understand why diversity & inclusion is so essential for proposals and what potential clients look for
- 2) Learn how talent & HR can best coordinate with marketing and business development to synchronize the mutual goal of ensuring that women and diverse staff gain essential business development experience that qualifies them for partner
- 3) Learn how to build a 'trust halo' when your firm is still 'in process' on inclusion efforts - as all are
4. Hear case studies from major firms that have converted diversity recognition to revenue

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# Thursday, June 13 2019

6/13 8:00AM-9:15AM

## ENG19K04. Stress-Testing America's Prosperity

**Zanny Minton Beddoes** - Editor-In-Chief, The Economist

For years, America's economy has led the rest of the developed world, but will the U.S. remain the global dynamo or is the country's ongoing recovery built on an unsustainable pile of debt? Minton Beddoes examines the economic outlook from American and global perspectives, offering up-to-the-minute insight on policy-makers' priorities and expertise on the likely direction of issues, ranging from job creation to the deficit's effect on global interest rates to potential financial regulation.

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6/13 9:30AM-10:45AM

## **AAM1925. Building Relationships and Referrals Through Networking: Online and the Real World**

**Jean Caragher** - *President, Capstone Marketing*

Networking continues to be a top lead generation strategy for CPA firms. In fact, according to Gear Up for Growth, networking with prospects and referral sources is one of the top four marketing activities firms of every size plan to increase. This is particularly important since "referrals from peers, friends or family" is the top tool millennial business owners use to find accounting services.

Attendees will enhance their networking skills with a mock networking event during the session and leave with practical ideas and processes to grow their referral network.

Don't miss out on the most effective way to generate leads simply because you don't think you have the skills. Attend this session and prove yourself wrong – and grow your referral network.

Attend this hands-on, interactive session and learn:

- 1) How to create and expand your network – even if you are an introvert
- 2) The five obstacles to networking and how to overcome them
- 3) How to prioritize your network
- 4) The Top 12 questions to ask at a networking event
- 5) Six networking don'ts
- 6) How to establish and grow your network through social media

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6/13 9:30AM-10:45AM

## **AAM1926. No Time, No Problem: How Content Creation Can Compete (And Win) Against The Billable Hour**

**Abbey Kanellakis** - *Content Development Specialist, Rea & Associates, Inc.*

Your managers and principals (you know, the ones you depend on to help you produce killer content to support your marketing strategy) are busy. They don't have time to write that 700-word blog post you need, and they don't understand why you are asking them for it now - with their major deadline approaching and client meetings to attend to. So, how do you get the killer content you need without asking them to forfeit the billable hour? This session will reveal several easy solutions you and your team can put into play immediately and will address content creation for a variety of mediums.

Learning Objectives:

- 1) How to be more effective when asking firm leaders for their expertise and thought leadership.
- 2) How to pull amazing content from principals, managers and other thought leaders (during busy season or in between client meetings) without them even knowing.
- 3) Content generation tools that will make your life easier.
- 4) How everything old can become new again when repurposing content

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6/13 9:30AM-10:45AM

## **AAM1927. Finding Hidden Business Development Horsepower at your Firm**

**Art Kuesel** - *President, Kuesel Consulting, Inc.*

The growth statistics don't lie. The profession is in a two year trend of organic growth decline. Firms need business development horsepower more than ever to grow their firms. And, this growth can come from new and previously hidden sources. In this program we'll identify four major ways of adding organic growth and horsepower and follow the careers of four 'non-traditional' business developers who have added significant revenue to their firms by embracing a career shift toward 100% business development.

Learning Objectives:

- 1) Identify new sources of organic growth,
  - 2) Apply new strategies to source growth within the four walls of the firm, and approach leadership with recommendations that can help drive new organic revenue sources.
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6/13 11:15AM-12:05PM

## **AAM1928. When Accounting and Content Add Up: How to Measure Content ROI**

**Samantha A. Nystrom** - *Content & Digital Marketing Manager, Sikich LLP*

Accounting and content and digital marketing are polar subjects that have common denominators: analysis and ROI. As digital marketing becomes more integrated, from recruiting to audits and everything in between, it gets harder to determine its ROI. With data streaming from social media to Google Analytics and PR placements, what should a company hone in on? Create a digital strategy and learn about the ROI in marketing through simple math: add your most recent digital marketing efforts, subtract the least engaging content, multiply one piece of content into six, and divide your new marketing plan internally and externally to make the most of your digital marketing efforts. Walk away with a better understanding of digital marketing analytics, and which data speaks to the greatest ROI.

Learning Objectives:

- 1) Distinguish which data to focus on to help refine your digital marketing strategy for greater results with less effort.
- 2) Walk away with an understanding of the impact content marketing has on business metrics to more effectively measure content marketing ROI.
- 3) Understand how to do this with minimal effort through a worksheet that guides you through how to take one piece of content and easily multiply it into six pieces that can be used in various outlets.
- 4) After this session, you will be better able to align content and revenue attribution.

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6/13 11:15AM-12:05PM

## **AAM1929. Tales from the Other Side: The CPA as a BD Executive**

**Jay L. Oliphant** - *CPA, DHG LLP*

As accounting firms recognize the value of a solutions-based approach to serving clients, the demand for CPAs who can ask the right questions and develop trusted relationships increases. Some CPAs have translated these skills into full-time business development roles. In this session, participants will hear from a successful CPA from a Top 20 accounting and advisory firm who has dedicated his career to creating new business opportunities. CPAs, marketing specialists, and business development professionals will gain valuable insight on leveraging their skills and experience to grow their firm.

Learning Objectives

- 1) Understand the role of Business Development in today's CPA firm
- 2) Leverage the diverse background of marketing and business development professionals to grow their firm.

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6/13 11:15AM-12:05PM

## **AAM1930. We have too many projects planned for next year - how do we \*wisely\* prioritize them?**

**Launa Stewart** - *Founder / Principal Consultant, Launa Stewart Consulting*

Do you have too many 'Urgent/Top' priority projects lined up for next year? Are you constantly navigating the competing needs of the different groups within your firm? In this session you will learn ways to better consolidate, articulate, and prioritize your organization's initiatives so that you can confidently draw the lines between 'should do' / "could do" / "might like to do someday"-type categories. Using decision science techniques & tools, see how you can fold hard data with "soft input" together to give your firm the best foundation possible for making sound and informed growth decisions.

Attendees will learn:

- 1) How to clarify your firm's most important goals / characteristics when measuring and weighting projects / initiative portfolio(s)
- 2) Different decision science methodologies that can be used when gathering stakeholder's input
- 3) How to evolve your prioritized project list over time; integrating the inevitable changes that will occur in the market place, evolving client needs and expectations, and developments within your firm.

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6/13 1:15PM-2:30PM

## **AAM1931. Playing Politics: The Psychology of the Human Workplace**

**Karyln Borysenko** - *Organizational Psychologist, Zen Workplace*

When most people think of office politics, they have a visceral negative reaction. But here's the thing: When you learn to navigate the unspoken rules of the workplace, you can achieve more than you ever dreamed! Playing Politics offers five concepts you need to know based on the science behind how human beings make decisions at work. It's a crowd pleaser, a talk that with entertain, inspire, and offer practical advice for improving your office effectiveness.

Learning Objectives:

- 1) Understand the psychological drivers of how people make decisions at work.
- 2) Build better relationships at work with people at all levels in your organization.
- 3) Inspire you to think differently about the dynamics of your organization so that you can be an influencer and change agent, using "politics" for good rather than for evil.

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6/13 2:45PM-4:00PM

## **ENG1932. What is the Purpose of a CRM and Can't I Find the Right One? (PST, AAM)**

6/13 2:45PM-4:00PM

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**ENG1933. Roundtable Discussions: BUSINESS DEVELOPMENT (PST, AAM)**

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6/13 4:15PM-5:05PM

**ENG1935. Mindful Technology: Embracing Technology, Innovation and Mindfulness to Create Greater Human Connections (PST, AAM)**

**Amy Vetter** - *President, QuickStart Training Inc*

Embracing new technology, will not isolate people or make us irrelevant as some fear. Instead, when used correctly and ethically, technology can empower leaders and employees to create stronger business relationships. Learn how to leverage technology to tap back into your purpose and creativity, become more mindful and empathetic as leaders and communicators, and create a greater sense of work-life harmony.

In this presentation, you will:

- 1) Unlearn the routines of the past by embracing technology and learning how it's currently being incorporated and connecting people in business and improving company culture
- 2) Tap into self-discovery and mindfulness techniques to feel more fulfilled in the work you do
- 3) Learn how to let technology do the heavy lifting so you can dedicate more time to developing the soft skills necessary to create a collaborative and lasting relationship with your employees and your customers

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6/13 4:15PM-5:05PM

**ENG1934. Reimagining Cross-Selling as Cross-Solving (PST, AAM)**

**Carrie Steffen** - *President, Co-Founder, The Whetstone Group*

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