

Monday, June 10 2019

6/10 8:00AM-12:00PM

ENG19101. Best Practices in Firm Management (PST, FMA)

Ann White - *Human Resources Regional Manager, BDO USA*

Roman H. Kepczyk

Bill Pirolli

Join Bill Pirolli, CPA and other leading practitioners and consultants for a deep dive into the best practices in Firm Management. Topics will include the People, Processes, Clients and Financial Management attributes of highly successful firms.

Well managed highly profitable firms are not born, they are made. Learn about current trends in finding and keeping qualified staff, current and future trends in technology, processes and automation, growing and retaining your client base and how having good financial processes and accountability can lead to higher profits.

This pre-conference workshop will include takeaways that you can implement right away in your own firm. Bring your challenges and successes to share with your peers in round table discussions.

Learning objectives:

- 1) Learn the best practices in Firm Management
 - 2) Discover how you can create a future ready profitable firm
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6/10 8:00AM-12:00PM

FMA19101. Talent Management Workshop: Evaluate and Build/Update Your Organization's Talent Management Plan

Jeremy S. Wortman

Most accounting firms (and all businesses in general) have a clear understanding and plan for their operational strategy. However, when asked if they have a clear strategy regarding their human capital more than 80% say they have "no plan" or "very little of a plan" (e.g., they may have a staffing plan or do some sort of succession planning). Yet, when asked how important their people are to the ongoing, long-term success of their business the overwhelming response is, "critically important." Thus, there is a large disconnect between the practice of talent management and its idealized state. Accordingly, this session helps organization leaders understand the the robust nature of talent management and how they can begin thinking and creating a more strategic approach to the acquisition, engagement, development, and retention of their most valuable asset – their people. During this session participants will explore a framework that they can use to immediately begin assessing their own organization in terms of talent management without over-engineering the process. Participants will be intellectually stimulated to think about the people-side of their business in a more comprehensive and deeper manner; thus, positioning themselves to identify areas of enhancement that drives their operational strategy. The final product of this workshop will be a completed audit of your firm's talent management practices and recommended action plan to be presented to your firm's most senior leaders.

Learning Objectives:

- 1) Discover a Talent Management framework that facilitates a deeper and more comprehensive analysis of your organization's human capital
 - 2) Explore why, and how, hiring the right person (i.e, talent acquisition) the first time using validated instruments increases productivity and drives employee retention – as well as how bad hires waste money
 - 3) Once the right person is hired, we explore how to get them engaged (i.e., talent engagement) so that they work hard for you, get along with others, and become loyal (which mitigates turnover)
 - 4) Once you hire the right person and then get them engaged, you will explore ways to develop (i.e., talent development) your people so that they can build their talents into strengths and apply them to the job – this is the number one driver of employee retention
 - 5) Explore what it means to leverage talent – this domain of talent management involves career pathing, succession planning, mentoring etc. which allows your organization to maximize its collective talent
 - 6) Identify how all of the collective domains of talent management drives talent retention – which not only saves money but headaches as well identify various tools that are readily accessible to support the analysis and practice of all talent management domains
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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

Tuesday, June 11 2019

6/11 7:00AM–7:50AM

FMA19ER01. The What of Professional Firm Management

6/11 7:00AM–7:50AM

FMA19ER02. Changes in How Learning is Done

Learning is a vital part of developing, retaining and growing our firms. We will discuss how the changes around us are impacting how we learn and discuss ways to adapt. We will feature firms' successes in this area.

Learning Objectives:

- 1) Review the science behind how we learn
- 2) Discuss the impact of technology changes Identify ways to become a self-directed learner Describe best practices of learning

6/11 8:00AM–9:15AM

FMA1901. Creating a Pathway for Your Technical People to Transform Into Advisors

William Reeb - *CEO, Succession Institute, LLC*

At a time when technology is automating much of the compliance function, globalization is delivering talent at pennies on the dollar, it is time for every CPA, not just the business development CPA, to do a better job of living up to our profession's mantra of being our clients Most Trusted Business Advisor. It no longer is enough just to deliver information about the past. We need to help our clients consider their past, their trends, their key operating statistics and use that information to help them bridge their organization's and themselves into a better, more profitable and sustainable future. This session centers on augmenting and/or refining the skills required to effectively deliver future focused facilitative/advisory services.

Learning Objectives:

- 1) Learn how to move from being an Expert to an Advisor
- 2) How to ask the kind of open-ended questions that promote the client expounding on issues beyond traditional accounting problems,
- 3) Improve your listening and communication skills,
- 4) Understand how to act in the role of your client's general contractor, and much more.

6/11 9:30AM–10:20AM

ENG1906. How to Say Anything to Anyone (PST, EDG, FMA)

Shari Harley

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

FMA1902. Sharpening Your Ethical Intelligence

Jeremy S. Wortman

This session is the third in a series of four. Our session takes a unique approach to discuss ethics in the accounting profession. We focus on the most critical, and often the most neglected, element of ethical decision-making, THE INDIVIDUAL. This session is designed to help the participant 1) learn about the defensive psychological processes (i.e., Rationalization and Social Desirability biases) that impede the ethical decision making process and 2) to build Moral Courage and Moral Resiliency which both enhance the ethical decision making process – collectively, these two very different approaches help to create strong ethical decision makers. During the session we review the ethical decision making process how the brain morally matures and the biggest myths associated with ethical decision making. Primary focus is then given to self-destructive thinking (which impedes ethical decision making) and is practiced by using accounting related case studies. The course content is later synthesized with the guiding principles of the Accounting profession. Additionally, the session provides the participant an overview of the current state of ethics in Corporate America to serve as a benchmark for both personal and organizational development.

Learning Objectives:

- 1) Review the Ethical Decision Making process, moral cognitive development, and the most common myths associated with ethical decision making
- 2) Become aware of counter-productive psychological processes that impede the ethical decision making process
- 3) Recognize the biases that we all fall victim to when confronted with a moral dilemma
- 4) Develop moral courage which helps stand up in accordance to one's moral compass even in the face of adversity so that ethical behavior actually occurs
- 5) Develop moral resiliency which helps bounce back from adversity and tough situations so that moral behavior is continued
- 6) Apply ethical decision making principles and moral intelligence to multiple case studies
- 7) Update regarding the ethical state of Corporate America
- 8) Synthesize the psychological processes with the AICPA code of conduct

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

FMA1903. Engaging All Generations in the Firm's Future

Jeremy Clopton - *Director, Upstream Academy*

As much as we'd like everyone to fit the same mold, the inescapable fact is that multiple workplace generations create multiple perspectives. Differences in views on flexibility in location, career path, schedule, and work style have created a very diverse workplace. The firm that can engage multiple generations and meet their needs will attract a wealth of eager applicants, foster a more productive environment and have a great pool of experiences, perspectives and talent to draw on. In this session, Jeremy will share how to find and tap into the potential of each generation so you can engage all generations in dealing with the changing landscape of modern business.

Learning Objectives:

- 1) Understand the foundations of beliefs for the generations in firms today.
- 2) Explain best practices for engaging multiple generations for firm growth.

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

FMA1904. Strategic Planning or Vision

Jennifer Wilson

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

ENG1914. New To Firm Management (FMA, PST)

Stacey Hekkert - *Managing Partner & President, Anton Collins Mitchell LLP*
Kristen Holthus

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

FMA1905. How to Use a Talent Assessment to Hire for Culture Fit

Jeremy S. Wortman

6/11 4:45PM-6:00PM

FMA1906. Breakout by Firm Size Sessions: <25 People

6/11 4:45PM-6:00PM

FMA1907. Breakout by Firm Size Sessions: 26-49 People

6/11 4:45PM-6:00PM

FMA1908. Breakout by Firm Size Sessions: 50-75 People

6/11 4:45PM-6:00PM

FMA1909. Breakout by Firm Size Sessions: 76-100 People

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

6/12 11:30AM–12:45PM

FMA1911. Email Extinguisher: Simple Steps to Shrink the Inbox

Marcey Rader - Productivity Consultant and Speaker, Work Well. Play More!® Institute

Do you have an inbox full of emails and don't know where to start? Do you use your inbox as your task list? Get the tools you need to break out of email jail. This session focuses on email behaviors and shortcuts for G Suite and Outlook users.

'I've seen major improvements in the last month after attending Email Extinguisher. I left feeling validated with tangible tools to help improve my day-to-day work. The workshop felt like church to me, saying "amen" and "Hallelujah" after each statement.' T. M. Senior Clinical Trial Manager, Vertex Pharmaceuticals.

Learning Objectives:

- 1) Overcome email anxiety and addiction
 - 2) Shrink your inbox with rules, filters, and newsletter organization
 - 3) Communicate effectively to shut down with Inbox Zero
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6/12 11:30AM–12:45PM

FMA1912. The Alien Invasion: Non CPAs in our CPA World

6/12 1:55PM–2:45PM

FMA1913. Shifting to a Learning Culture

JoAnn Labbie

We are living in face paced changing world which is impacting our cultures and the learning environment. We will review strategies for strengthening learning, so we are building capacity at all levels. We will explore new best practices and actions for everyone to consider.

Learning Objectives:

- 1) Define learning culture and successful learning organizations
 - 2) Discuss tips, tricks, and transitions
 - 3) Outline factors necessary for a successful change
 - 4) Discuss what is working and what is not working with our firms
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6/12 1:55PM–2:45PM

FMA1914. Delivering through Diversity

6/12 3:00PM–3:50PM

FMA1915. Using Strategic Questions to Drive a More Successful Culture

Jeremy Clopton - Director, Upstream Academy

Do you know your strategic questions? Chances are you're struggling to overcome challenges: integrating millennials, effectively managing data, leveraging technology, moving the needle on innovation, etc. But it's also likely you are focused on the wrong questions. Rather than taking the traditional approach to these topics, Jeremy will encourage you to start with different questions. Through engaging discussion, humor and actionable takeaways, Jeremy will use the SQ Method to provide firms the framework they need to ask the right questions, get the answers they need, and build a more successful culture.

Learning Objectives:

- 1) Describe a methodology that focuses on questions to accomplish firm goals.
 - 2) Understand how a culture of questioning can lead to innovation, growth, and overall success.
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6/12 4:50PM–6:05PM

FMA1916. How to Build a High Performing Culture

Bill Keiser

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.

6/13 9:30AM–10:45AM

FMA1917.

6/13 9:30AM–10:45AM

FMA1918. Lean CPA Firm Operations

Roman H. Kepczyk

Lean Six Sigma consultations within the accounting profession primarily focus on process improvement within the firm's tax and assurance practices, often overlooking internal operations where there is a trove of production efficiency and financial benefits. Lean CPA Firm Operations will explain how Lean Six Sigma methodologies can improve your firm's Practice Management, Internal Accounting, Payroll and Information Management processes to streamline your internal operations.

Learning Objectives:

- 1) Clearly understand Lean Six Sigma consulting methodology with an explanation of practical tools and resources that you can apply immediately within your own firm
 - 2) Walk through the firm's internal operations to identify key areas where Lean processes will improve your firm's administrative processes.
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6/13 11:15AM–12:05PM

FMA1919. Team Development TBD

Christine M. Holliden

6/13 11:15AM–12:05PM

FMA1920. The Legal View of Being Non-Politically Correct

David Miklas - *owner, Law Office of David Miklas, P.A.*

What happens if the boss say something that is not Politically Correct? Is it different if an employee does it? Can you be sued for discrimination or harassment? How do federal employment laws impact what can be said at work? Attendees will learn about the Equal Employment Opportunity Commission, the National Labor Relations Act, and various federal laws, including Title VII of the Civil Rights Act.

Attendees will learn:

- 1) How to analyze verbal and written statements (including email and text messages) that may not be politically correct; and
 - 2) How the employer (e.g., a CPA firm) should respond when they receive a complaint about comments that are not politically correct, or uncivil, or otherwise inappropriate.
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6/13 1:15PM–2:30PM

FMA1921. Is Leadership Going Soft?

Judy Hoberman

Study after study has shown that soft skills are vital in helping individuals and businesses succeed. According to a recent report from Boston College, Harvard University, and the University of Michigan, training in soft skills such as communication and problem solving can raise productivity and retention by 12 percent and deliver a 250 percent return on investment. But how can you develop your soft skills, and use them to your advantage? Adapting to the change in leadership skills starts with the culture of the company. During this session, you will hear about how soft skills can help set you apart and give you a competitive edge in the workplace while also discovering the seven essential qualities of leadership that are so important in our daily lives.

Learning Objectives:

- 1) Discovering ways to see the soft skills from a different vantage point
 - 2) Understanding the characteristics of effective leadership How to redefine the climate if you can't change the culture
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6/13 2:45PM–4:00PM

FMA1922. Data Driven Firm Automation Panel

Roman H. Kepczyk

Big data is having a profound impact on the accounting profession and CPA firms are utilizing data analytics applications, machine learning and robotic process automation. This session will discuss actual utilization of these technologies within accounting firms and an overview of where these technologies are going.

Learning Objectives:

- 1) Hear firsthand examples of data analytic and dashboard tools, automated production processes use machine learning and robotic process automation being implemented in CPA firms today
 - 2) Understand the process the panelists went through to evaluate and implement applications
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6/13 4:15PM–5:05PM

FMA1923. 50 Ideas in 50 Minutes
