7:30 AM  optional golf
9:00 - 10:30 AM  continental breakfast for early arrivers/clinic participants
9:00 - 11:00 AM  one-on-one clinics
12:15 PM  lunch
1:15 PM  welcoming remarks
1:30 PM  general session:
           icebreaker – the ceo’s field guide to project management
3:00 PM  break
3:30 PM  roundtable discussions

DESIGNING YOUR FIRM’S FUTURE LEADERSHIP TEAM
kathryn sprankle, sprankle leadership

Effective succession planning isn’t happenstance and shouldn’t come down to “Who’s going to be here in five years?” Today’s successful leadership teams are planned and finely tuned. This session will examine participants’ experiences anticipating and planning their next generation successors: What leadership qualities are needed to guide the firm over the next five to 10 years? What are prime considerations for building a top team? What happens when there aren’t strong internal candidates? And how will we accomplish any impactful talent planning, let alone at the senior level, when we face a critical global worker shortage in the near future?

CULTURAL ALIGNMENT: PULLING TOGETHER? OR TUG OF WAR?
ray kogan, kogan & company

Based on the popularity of last year’s impromptu session on the subject of cultural alignment, this roundtable will delve deeper into questions that plague many CEOs: how to ensure that their fellow firm leaders are aligned in their values, priorities, and behavior…and what to do about those who may not be in alignment (often referred to as “outliers,” “rogues,” or occasionally, less complimentary terms). CEOs attending this roundtable discussion will share their experiences—positive and otherwise—addressing this dilemma within their firms.

WHO DOES BD AND HOW: MODELS FOR SUCCESS
rich friedman, friedman & partners

One of the biggest challenges firms face is creating a business development (BD) culture and attendant structure that positions the firm for future growth and prosperity—one that maximizes the potential of its staff and minimizes low-ROI activities and investments. This breakout will explore several key topics that provide “Maalox Moments” for many firms:

• What makes for an effective business developer?
• Is it really everyone’s job, or is that a load of crap?
• The Seller-Doer: a pipe dream or the most effective way to create a successful sales culture?
• Full-time sales people:
  • Are they necessary? What’s their role in a seller-doer culture?
  • What should you look for—and avoid—in the hiring process?
• Ensuring that seller-doers and sales people work collaboratively

5:00 PM  free time
6:30 PM  cocktail reception and dinner at Brittlebush restaurant
THU  FEB  27

7:30 AM  breakfast
8:30 AM  keynote address

HOW TO SAY ANYTHING TO ANYONE
shari harley, best selling author

You have a request for one of your co-workers but don’t know how to say it, so you don’t say anything. A project you worked on for six months has become a black hole, and there is no information about the status. You’re frustrated, but you don’t say anything. Two employees aren’t working well together, and it’s impacting the atmosphere in the office. You don’t know what to say, so you don’t say anything. Speaking up when we are frustrated is hard and, as a result, most of us don’t. Instead, either we tell other people (aka gossip) or we say nothing, and relationships become strained. You can say anything to anyone and have it be easy. You just need to lay the ground work to do so, and most of us don’t.

Three Learning Objectives:
• Build trust in all of your business relationships, making it easier to say hard things.
• Find out what the people your work with need from you, so you don’t have to guess.
• Tell others what you need, making it more likely that your needs are met.

Shari Harley is the founder and president of Candid Culture, an international training and consulting firm focused on bringing candor back to the work place and creating a safe haven for employees, managers, and clients to speak honestly. Shari is a business person whose previous experience includes selling and facilitating for Dale Carnegie Training, conducting customer service training for American Century Investments, leading leadership training for OppenheimerFunds, and managing operations across 21 nation-wide locations with 200 matrixed employees.

Shari’s practical approach to improving business relationships has led her to speak and train throughout the United States and abroad.

10:00 AM  break
10:30 AM  roundtable discussions

SAY ANYTHING TO ANYONE
shari harley, best selling author

Shari will facilitate discussion about using some of the tools discussed in her talk to address your most challenging conversations and situations.

STRATEGIES FOR EXECUTIVE COMPENSATION:
NO ONE SIZE FITS ALL
laurie dreyer, international human resources director, stantec

Increasingly, firms are tying their executive and leadership compensation programs to the achievement of key company-wide goals. As packages among firms become more divergent, salary surveys and other comparisons become less useful to Boards and executive teams in search of meaningful compensation approaches. In this roundtable, Laurie will encourage discussion among the group about the foundations on which some firms have built successful compensation programs, what hasn’t worked and why, and the value of a truly impactful compensation program.
OWNERSHIP EXIT STRATEGIES  
colvin matheson and david cohen, matheson financial advisors

After taking a couple of years off, ownership transition planning is alive and well as companies, feeling more secure in their teams, clients, and projections, are again taking steps to implement programs to move ownership from one generation to the next. However it remains a challenge to find the balance between the goals of the buyers, the needs and objectives of the sellers, and the strategic plan of the company. We will delve into the deeper issues such as how to position your firm for an ownership solution, and whether internal transition remains a viable strategy given the balancing act that is occurring amongst the different generations who are involved.

12:00 PM lunch
1:00 PM roundtable discussions

DESIGNING YOUR FIRM’S FUTURE LEADERSHIP TEAM  
kathryn sprankle, sprankle leadership

OWNERSHIP EXIT STRATEGIES  
colvin matheson and david cohen, matheson financial advisors

LEVERAGING GENERATIONAL DIVERSITY IN THE WORKPLACE  
laurie dreyer, international human resources director, stantec

It’s been fun poking at those upstart Gen Y’s, muddling Gen Xers, overbearing Boomers, and out-of-it Geezers. Now, that we’ve got that out of our systems, let’s talk about the exponential value of weaving the strengths of these different experiences and perspectives into a strong, yet flexible, fabric. While facilitating discussion of your own experiences, Laurie will share insights from her years of working nationally and internationally with employee groups of all ages (and their parents in some cases), as well as her deep-dive research into generational differences and values.

2:30 PM break/get ready for desert tour
3:00 PM desert tour + dinner event

We’re excited to offer an exciting field trip this year through Arizona Hummer Tours, an outfit that provides unique treks through the famous Sonoran Desert. We will take a bus from the hotel to our launch site where we’ll be met by our guides for the Hummer Tour. We’ll tour through stunning desert landscapes to visit ghost towns and Native American ruins. Our day will end with a ranch-style cookout and cowboy games under the stars. Our tour operator, Mike Knoles, is a native Arizonan who loves sharing his state, its beautiful land, and regional history.
7:30 AM  breakfast
8:30 AM  roundtable discussions

**CULTURAL ALIGNMENT: PULLING TOGETHER? OR TUG OF WAR?**
ray kogan, kogan & company

**WHO DOES BD AND HOW: MODELS FOR SUCCESS**
rich friedman, friedman & partners

**GROWING A SUCCESSFUL ESOP BUSINESS**
colvin matheson and david cohen, matheson financial advisors

ESOPs can be a useful tool for ownership transition planning, from the tax incentives to the financing capabilities. However, as many firms learn, there is much more to the ESOP than it just being a financial buyer. Come participate in a session to gain a better understanding of your ESOP and how to utilize the ESOP from a growth perspective. This session will address many issues related to ESOPs including voting control and the trustee’s responsibilities, long-term strategy, growth and acquisitions, company culture, second stage transactions, 100% ESOP owned S-corporations, and how the ESOP is coordinated with their other benefit plans and compensation. Whether you are an ESOP company or thinking about implementing one, this session will assist you as you move forward.

10:00 AM  break
10:30 AM  general session

**THE RACE TO THE BOTTOM: OVERCOMING THE COMMODITIZATION OF PROFESSIONAL SERVICES**
kathryn sprankle, sprankle leadership
ray kogan, kogan & company
and a panel of ceos

Consultant selection decisions increasingly seem to be based on fees rather than qualifications, and private sector and public clients alike often see little enough distinction among their competing consultants that, in the absence of other distinguishing criteria, fees govern their decisions. In this interactive panel discussion, we’ll kick off with several industry case studies illustrating different approaches and strategies in navigating and rising above a price-based marketplace.

12:00 PM  closing lunch
1:25 PM  optional golf