



Upstream Academy's Premier Event
for Firm Leadership Teams



October 28-29, 2014 • Chicago, Illinois

BEST PRACTICES 2014

TOTAL TIME MANAGEMENT:
PUTTING YOUR NON-BILLABLE TIME TO WORK

IF ALL YOU'RE CONCERNED ABOUT IS
BILLABLE HOURS, YOU DON'T NEED TO
WORRY ABOUT YOUR FIRM'S FUTURE.

IT DOESN'T HAVE A FUTURE.

Billable hours are all about today.
Non-billable hours are about tomorrow.
They're about controlling the destiny of your firm.

Let's talk about getting more from your investment time.

Join us in Chicago October 28-29.





CONFERENCE SPEAKERS

Comprised of some of the nation's top thinkers in the profession, our roster of conference presenters will confidently and knowledgeably address many of the most challenging issues facing firms today.

Don't re-create the wheel. Learn from those who have thought through the issues and developed practical solutions.



Sam Allred
Director at
Upstream Academy



Tim Bartz
Director at
Upstream Academy

The Conference

Billable hours are the financial lifeblood of your firm and crucial to its success. But managing those hours is the easy part of total time management. Managing your firm's investment time is where it gets challenging. And it's the wise use of those non-billable hours that ultimately determines the future of your firm.

So how do you do it? How do you take a total time management approach and ensure that both billable and non-billable hours are used to best advantage? You have questions; our presenters have answers. Here are some of the topics for this year's conference sessions:

- How are the best firms building their future every day by turning non-billable time into investment time?
- What do you need to do to effectively engage a generation of employees that has a very different mindset about work schedules, work/life balance, career paths, etc.?
- How do you connect individual accountability to organizational objectives?
- Are you giving firm culture the energy, commitment, and investment time it needs to thrive?
- Today, 61% of accountants and auditors are female; do you know how to effectively harness the tremendous potential of nearly two-thirds of your workforce?
- Effective coaching and meaningful goals are essential to getting the most from non-billable hours; do you know how to use these processes to create a competitive advantage?
- More billable hours means more income, greater growth, and increased profitability, right? Think again.
- What should you be doing to help firm members use investment time to cope with the stress of success?
- How do you limit the amount of time spent on administration to ensure firm members stay focused on investment time and billable hours?



Mary Bennett
Owner of
MLBennett Consulting LLC



Jonyce Bullock
Advisory Practice
Leader at
Squire & Company, PC



Carl George
CEO of Carl George Advisory,
LLC and former CEO of
Clifton Gunderson LLP



Jack Hinsche
Partner Emeritus at
Windes, Inc.



Tim Larsen
Managing Partner at
Squire & Company, PC



Randy Myeroff
CEO of
Cohen & Company



David Posen
Author of
Is Work Killing You?



Heather Sunderlin
Human Resources
Director at Wall, Einhorn
& Chernitzer, P.C.

CONFERENCE AGENDA

Tuesday, October 28, 2014

7:00 – 8:00 am Breakfast

8:00 – 8:15 am **Welcome**
Sam Allred, Director at Upstream Academy

8:15 – 9:30 am **Investing in Your Future: Getting the Most from Your Firm's Non-Billable Hours**
Sam Allred, Director at Upstream Academy

As David Maister observed, billable time may decide current profits, but how non-billable hours are used determines the firm's future. If that thought causes you more worry than excitement, you won't want to miss this session. Is your firm getting maximum benefit from investment time? How do you keep non-billable hours from going up when charge hours go down? In this session, Sam will share how high performance firms are turning non-billable time into investment time and what you can do to build your firm's future hour by hour.

9:30 – 9:45 am Break

9:45 – 11:00 am **Wired Differently: Engaging the Next Generation of Employees**
Mary Bennett, Owner of MLBennett Consulting LLC

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 different workplace. The firm that can meet multiple generations' needs will attract a wealth of eager applicants and foster a more productive environment. In this session, Mary will share workplace best practices that balance client, firm, and individual needs and that will help you maximize the potential of all the generations.

11:00 – 11:15 am Break

11:15 – 12:30 pm **Keeping the Horse Before the Cart: Aligning Firm Culture to Drive Accountability**
Randy Myeroff, CEO of Cohen & Company

Great firms clearly define organizational success and carefully align important elements of their culture *before* tackling the elusive challenge of individual accountability. Join Randy for this session to explore the trials and tribulations of building a culture of accountability, and learn how to avoid missteps in aligning individual partner accountability with your firm's objectives.

Tuesday, October 28, 2014 (continued)

12:30 – 1:30 pm Lunch Break

1:30 – 2:45 pm Concurrent Sessions (choose one of three)

Preserving the Culture in a Thriving Firm: Proven Methods and Lessons Learned
Carl George, CEO of Carl George Advisory, LLC and former CEO of Clifton Gunderson LLP

A firm's culture is the instruction manual for the firm, the unwritten handbook that boosts morale, strengthens firm loyalty and trust, helps personnel grow, and gets your firm through trying situations. Believe it or not, a thriving culture and rock solid core values play a critical part in your firm's M&A strategy and succession planning for next generation leaders. Take note of the methods and stories that illustrate Carl's dos and don'ts, lessons learned, and successes and failures in preserving his firm's culture as a firm leader for 29 years. Don't miss this session!

Making the Most of the Most: Tapping into the Power of the 61%
Jonyce Bullock, Advisory Practice Leader at Squire & Company, PC

Forget the stereotype: man in a business suit, briefcase stuffed with papers. Today, 61% of accountants and auditors are female (and most will be found toting laptops or tablets), yet less than 20% of firm leadership is female. If you don't know how to harness the potential of nearly two-thirds of your workforce, how can you maintain a competitive advantage? Unfortunately, many firms are still catering to the old stereotype. What needs to change? Join us for this session and learn practical ways to handle differing expectations, work styles, schedules, advancement choices, and communication norms.

Getting Your Money's Worth from Coaching and Goal Setting
Heather Sunderlin, Human Resources Director at Wall, Einhorn & Chernitzer, P.C.

Coaching and goal setting. Nearly all firms do it, but only a few see the desired results. How do you transform a mediocre coaching program into something that attracts and retains top talent, builds careers, and gives your firm a competitive advantage? How do you help people set appropriate goals, teach coaches how to truly make a difference, and raise the quality of coaching and goal setting throughout the firm? Join Heather for this presentation and learn how to turn coaching and goal setting into powerful tools.

CONFERENCE AGENDA

Tuesday, October 28, 2014 (continued)

2:45 – 3:00 pm Break

3:00 – 5:00 pm **Discussion Forums: Shared Challenges, Shared Solutions**
Sam Allred, Tim Bartz, Jack Hinsche, Tim Larsen, Carl George

Always one of the most popular features of Upstream conferences, our afternoon discussion forums provide an unmatched opportunity to share your firm's greatest challenges and learn how other firm leaders have successfully dealt with the same difficulties. Bring your most vexing issues and a notepad, and be ready to return to the office with great new ideas for solving your firm's challenges!

5:15 – 6:15 pm Reception



Wednesday, October 29, 2014

7:00 – 8:00 am Breakfast

8:00 – 9:15 am **Is Stress Killing Your Bottom Line?**
David Posen, Author of *Is Work Killing You?*

The equation seems simple enough: more billable hours means more income, and more income means greater growth and profitability. Right? Not necessarily. Join best-selling author and renowned speaker on stress, David Posen, MD, for an up-close, honest, (and often amusing) look at what the quest for more has done to the bottom line. He'll debunk some myths, explain the real business cost of workplace stress, and provide practical, real-world ways for taking a top-down approach to improving your bottom line.

9:15 – 9:30 am Break

9:30 – 10:45 am **The Stress of Success**
David Posen, Author of *Is Work Killing You?*

There's an old maxim that says, "Be careful what you wish for." For many in our profession who are working long hours to meet their billable budgets and build their careers, those words speak volumes. Problems don't diminish with success; they simply change. How do you deal with overload as success creates new client responsibilities and increasingly complex work? How do you protect your work time for the things that matter most? Join us for a thoughtful presentation on how to manage your stress and your "successful" life.

10:45 – 11:00 am Break

11:00 – 12:15 pm **Taking Care of Business without Administrative Over-Kill**
Tim Bartz, Director at Upstream Academy
Sam Allred, Director at Upstream Academy

As a firm leader, you wear many hats: client liaison, technical consultant, cheerleader, mentor, business developer, and financial advisor—just to name a few. The one hat you probably wish you could shed is "paper pusher." So how do you structure your firm to ensure you and others devote less time to administration and more to activities with the greatest short and long term impact on the firm? Join Sam and Tim as they explore what innovative firms are doing to take care of business without admin over-kill.

THE LOCATION

Chicago

Chicago's magic lies in its mix: sophisticated yet friendly, bustling city streets adjacent to long stretches of green parks and sparkling blue Lake Michigan, and a stunning year-round array of things to see and do, unique in all the world. We're excited to present the conference this year at The Drake Hotel, a Chicago icon that has defined elegance and hospitality since it opened in 1920. Situated in the Gold Coast neighborhood at the beginning of the Magnificent Mile, The Drake is footsteps away from Oak Street Beach and Lake Michigan.

With an endless assortment of theatre, music, dance, restaurants, shopping and nightlife at your fingertips and able to match every taste, budget and mood, come and discover why so many visitors fall in love with this city every year.

Hotel Information

This year's conference will be held at [The Drake Hotel](#), located at 140 East Walton Place. Reservations can be made [online](#) or by calling (800) 445-8667. You will need to specify Upstream Academy to receive the special conference rate of \$229.00 per night. We recommend making your reservation by Tuesday, October 7. If you have any problems with hotel reservations, please don't hesitate to contact us for assistance.

Conference Meal Information

Breakfast and lunch are provided on Tuesday and breakfast will be provided Wednesday. All meals are served buffet style. If you have special meal requests, please contact Kelsey at (406) 495-1850 or kelsey@upstreamacademy.com.



Air Travel Information

The hotel is located approximately 14 miles from Midway International Airport and approximately 19 miles from O'Hare International Airport.

Cancellation Policy

Registrants will be refunded their registration less a \$100 cancellation charge if they notify Upstream after October 15, 2014.

To Register

Go to www.upstreamacademy.com/bestpractices.asp or call Kelsey at 406-495-1850.



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CONTINUING PROFESSIONAL EDUCATION

Upstream Academy will recommend 13 hours of CPE credit for participation in this course. Prerequisite: None. Skill Level: Overview. Learning Objectives: After attending the BestPractices Conference, you will be able to identify your firm's best people and create processes to attract and retain quality employees.

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