



Upstream Academy's Premier Event
for Firm Leadership Teams



October 27-28, 2016 • Chicago, Illinois

BEST PRACTICES 2016

ENGAGING THE ENTIRE TEAM

WHAT IF EVERY MEMBER OF YOUR FIRM
WAS ENGAGED, ENERGIZED AND
PROACTIVELY WORKING TO MOVE YOUR
FIRM TOWARD A COMMON VISION?

Imagine what that would mean – not only for profitability,
but for your ability to set and accomplish ambitious goals,
to quickly change course when necessary and
to maximize the latent potential of all your team members.

Let's talk about how to increase engagement.

Join us in Chicago on October 27-28.



CONFERENCE SPEAKERS/FACILITATORS



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, real-world solutions you can immediately implement in your practice.



Sam Allred
Director at
Upstream Academy



Andy Armanino
Managing Partner at
Armanino, LLP

The Conference

While it might be unrealistic to believe that the part time mail delivery driver has the same passion as your most influential partner, getting your whole team more engaged and connected doesn't have to be a fantasy. Join us for BestPractices 2016 and we'll discuss ways to:

- Increase employee engagement
- Challenge the status quo
- Nurture change agents
- Motivate millennials
- Harness the power of Gen X
- Link staff interests to firm strategy
- Engage your alumni
- Create loyalty
- Inspire individuals to greatness



Tim Bartz
Director at
Upstream Academy



Jonyce Bullock
Advisory Practice
Leader at Squire &
Company, PC



Steve Castino
Partner at
Vestal & Wiler



Ted Dickman
Chief Executive Officer
of BKD, LLP



Dr. Robert T. Jones
Licensed Psychologist at
Southern Crescent



James Kane
Behavioral Scientist



Tim Larsen
Managing Partner at
Squire & Company, PC



Bill Mills
Director, Consulting Ser-
vices at Anderson Zur-
Muehlen & Co., P.C.



Katie Sterling
Partner at
Wertz & Company LLP



Mike Tobiason
Partner at
REDW

Phone: 406-495-1850

E-mail: info@upstreamacademy.com

Website: www.upstreamacademy.com

Address: P.O. Box 1147, Helena, MT 59624



To register visit www.upstreamacademy.com

CONFERENCE AGENDA

Thursday, October 27, 2016

7:00 – 8:00 am Breakfast

8:00 – 8:15 am **Welcome**

8:15 – 9:30 am **Fired Up, Not Burnt Out: Increasing Employee Engagement**
Sam Allred, Director at Upstream Academy

We've all had that experience: the disengaged worker – unhappy, unhelpful and unwilling to step beyond "the job." Hopefully the lack of engagement wasn't shown by the crew member fueling your airplane or Bob, the in-charge on one of your most challenging audits – since studies show that engaged employees perform 20% better and are 87% less likely to leave, which can make a huge impact on culture and profitability. In firms with high engagement, people feel trusted, empowered, appreciated, respected and challenged. A tall order, right? Join Sam as he explores what engagement means and how you can harness its power.

9:30 – 9:45 am Break

9:45 – 11:00 am **Challenge the Status Quo – It's Time**
Andy Armanino, Managing Partner of Armanino LLP

Doing the same thing year after year is easy, safe and ultimately promotes stagnation, stifles creativity and discourages your rising stars from working to their potential. So how do you engage your whole team in the quest for innovative ideas? How do you encourage outside-the-box thinking in the way your firm hires, promotes, uses technology, develops new services and helps your clients? Join Andy for this thought-provoking presentation as he challenges you to step outside the status quo and look at our profession in a new light.

11:00 – 11:15 am Break

11:15 – 12:30 pm **Securing Your Firm's Secret Weapon: Discovering and Nurturing Change Agents**
Ted Dickman, Chief Executive Officer of BKD, LLP

When we picture catalysts for change, we often think of partners consistently able to gain consensus for difficult but necessary policy changes. But healthy firms engage change agents at every level – the manager with a clear, realistic vision of a new service offering or the IT person championing updates in a way even the most technologically-challenged respect. So how do you grow generations of change agents and connect with them in a way that encourages and develops their abilities? Join Ted as he discusses how to discover and nurture change agents to become your firm's future leaders.

Thursday, October 27, 2016 (continued)

12:30 – 1:30 pm Lunch Break

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

Stop Reminiscing and Start Conversing: Understanding and Motivating Millennials

Katie Sterling, Partner at Wertz & Company LLP

In our profession, we spend a lot of time talking about Millennials. Unfortunately much of the talk emerges from established firm leaders who are far removed from this generation. They often include fond reminiscence about how great things used to be or ways to mitigate the damage the next generation will cause. But what would Millennials say about their own generation? What are their goals, philosophies and ambitions? And what do they most wish you knew about them? Join Katie to hear from a Millennial leading the discussion.

Harnessing the Power of the Lost Generation

Jonyce Bullock, Advisory Practice Leader at Squire & Company, PC

Everyone knows Baby Boomers are retiring and Millennials are taking over, right? Wait, what about the Gen Xers? Often overlooked, this generation is sometimes seen as "place holders" rather than a force to be reckoned with. But Gen Xers may hold the key to successfully navigating your upcoming generational changeover. Join Jonyce as she explores the role Gen Xers play. She'll discuss who they are, what they want, and how to maximize their positive impact on the generation retiring, the generation coming into the workforce and the sometime painful (but inevitable) transition period.

Turning Your Frisbees into Boomerangs: Engaging Your Alumni
Tim Bartz, Director at Upstream Academy

They've submitted their resignation and left the firm, so you'll probably never see them again, right? Unless your former employees have made a lifetime commitment to the French Foreign Legion, you'll likely see them at a business mixer, a client's office or even in the office down the hall. Keeping a close relationship could initiate anything from a nice word about the firm at a cocktail party to a happy return to your firm. Join Tim for this insightful session as he discusses ways to engage your alumni, encourage them to refer you to quality clients, and even leave the door open for their return to the fold.

CONFERENCE AGENDA

Thursday, October 27, 2016 (continued)

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

Put Passion to Work in Your Firm: Connecting Individual Interests to Firm Strategy

Steve Castino, Shareholder at Vestal & Wiler

Passion gives us purpose, driving our effort, attitude and desire. So can you imagine the impact of having everyone on your team passionate about making progress? The key to getting the most from all your people is to connect their passions to the work the firm is doing for clients and the community. But how do you do this? Join Steve as he discusses how to discover passions that intersect with firm vision, how to integrate individual passions with career goals, and how to effectively customize adaptable careers that take full advantage of individual passions.

2:45 – 3:00 pm Break

3:00 – 5:00 pm **Discussion Forums: Shared Challenges, Shared Solutions**

Sam Allred, Tim Bartz, Steve Castino, Ted Dickman, Tim Larsen, Bill Mills, and Mike Tobiason

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

Friday, October 28, 2016

7:00 – 8:00 am Breakfast

8:00 – 9:15 am **Why Should I Stay with You? Demystifying Loyalty**
James Kane, Behavioral Scientist

Too often we wax nostalgic about how people used to be more loyal, lamenting the fickle nature of clients and the declining employee retention rates. Instead let's talk about how to win loyalty. By combining the latest research in neurology, anthropology, and behavioral psychology, James Kane is creating an entirely new understanding of what it means to be loyal, how and why it exists, and what organizations and individuals need to do to achieve it. Join James as he explains what he's learned about loyalty and how you can take positive, proactive steps to earn loyalty from both staff and clients.

9:15 – 9:30 am Break

9:30 – 10:45 am **Loyalty Part 2: Creating Unbreakable Bonds**
James Kane, Behavioral Scientist

We've talked about the principles behind loyalty; now let's put those principles to work. How does this theory apply to your work with clients and staff? How can you use this theory to change your firm's culture so people give you loyalty organically? What can you do to forge unbreakable relationships with those who are critical to your success and the success of your firm – your clients, your partners and your staff? Join James as he applies new skills, tools, and tactics, to help you transform your culture, and shares fresh insights and strategies for taking all your relationships to new levels.

10:45 – 11:00 am Break

11:00 – 12:15 pm **Challenging Individuals to Greatness**
Dr. Robert T. Jones, Licensed Psychologist / Executive Coach at Southern Crescent Psychology

Why do some people seem to excel in what they do and others seem stuck on average? This session with Dr. Bob Jones IV will give you the tools to take you from average to excellent in all aspects of your life. Dr. Bob has worked for over fifteen years helping business professionals and athletes find their path to excellence and develop a workable plan to achieve their goals. The grandson of golfing great Bobby Jones, Dr. Bob Jones is a licensed psychologist and executive coach practicing in metro Atlanta.

12:15 – 12:30pm **Closing Remarks**



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.

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 [Renaissance Chicago Downtown Hotel](#), located at 1 W. Upper Wacker Dr., Chicago, Illinois. Reservations can be made [online](#) or by calling (312) 372-7200. You will need to specify Upstream Academy to receive the special conference rate of \$288.00 per night. We recommend making your reservation by September 28. If you have any problems with hotel reservations, please don't hesitate to contact us for assistance.

Conference Meal Information

The conference will run from 8am to 5pm on Thursday, October 27 and from 8am to 12:30 pm on Friday, October 28. Upstream will provide a continental breakfast starting at 7am each day, breaks on both days, and lunch on Thursday. You and your adult guest are welcome to join us for a networking reception at 5:15pm on Thursday. Participants are on their own for dinner.

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 12 miles from Midway International Airport and approximately 18 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, 2016.

To Register

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



Phone: 406-495-1850

E-mail: info@upstreamacademy.com

Website: www.upstreamacademy.com

Address: P.O. Box 1147, Helena, MT 59624-1147

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.

Upstream Academy is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: www.nasba.org

