



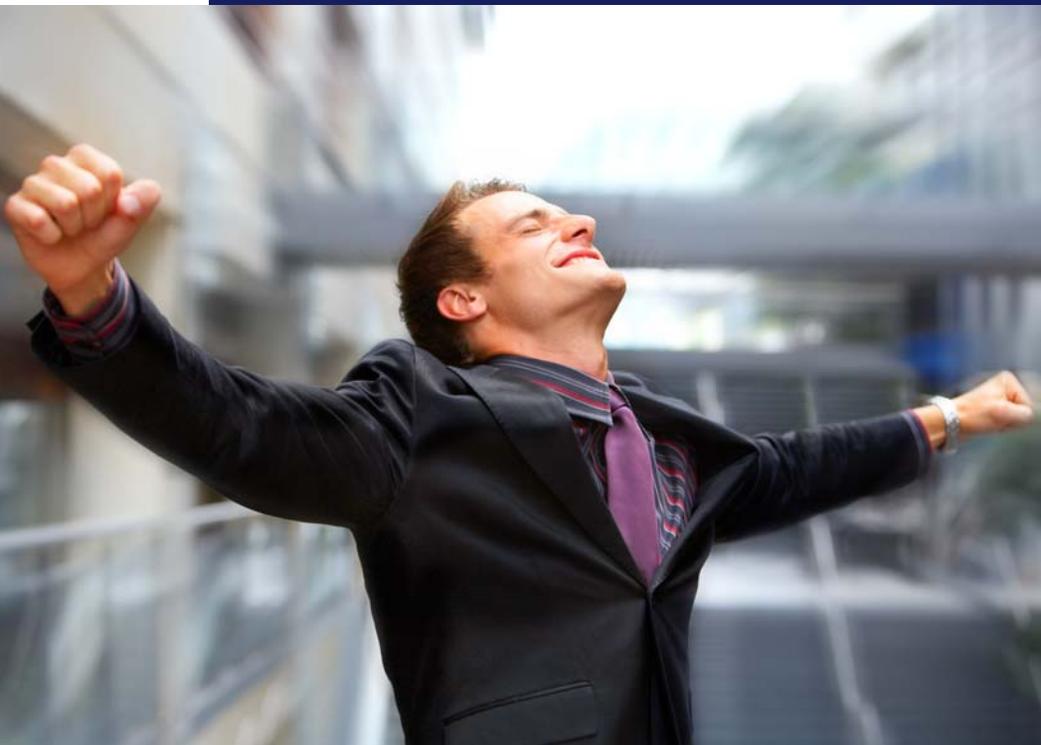
Upstream Academy's Premier Event
for Leading Partners in Accounting Firms

IN THE END,
IT COMES DOWN TO ONE THING.

RESULTS.

Great results come from great execution.
Learn how to get the results you need
for your firm to thrive.

Join us in Denver, July 10-11.
Great execution, great results.



July 10-11, 2014 • Denver, Colorado

HEADWATERS 2014

GREAT EXECUTION,
GREAT RESULTS



CONFERENCE SPEAKERS



The Conference

For most, it's a no-brainer: If you expect great results, you need great execution. Good luck finding shortcuts or exceptions.

So what do we mean by "great execution"? What does it look like in the real world of public accounting? More importantly, what should it look like in your firm, with your particular issues, in 2014?

We have real life answers and recognized experts to explain those answers. Here's a sampling of the topics we'll cover at HeadWaters 2014:

- How do you develop a thriving—vs. surviving—consulting practice?
- How do you create a strategic plan that actually delivers on its promises?
- What do you need to do to keep your firm from sinking in the quicksand of inaction?
- How do you use partner compensation to reinforce desirable results?
- How do you identify and achieve your training priorities, and how can you tell if you're getting your money's worth from your investment?
- What's "exceptional client service" and how do you create a firm culture that tolerates nothing less?
- How do you effectively measure ROI when it comes to marketing efforts?
- What is it about a firm that lifts it above other good firms and makes it one of the "best of the best"?
- How can you use a new way of analyzing and understanding key indicators to produce meaningful action and great results?



Sam Allred
Director at
Upstream Academy



Tim Bartz
Director at
Upstream Academy



Jonyce Bullock
Advisory Practice Leader
at Squire & Company, PC



Joey Havens
Executive Partner
at Horne, LLP



Jack Hinsche
Partner Emeritus at
Windes, Inc.



Sarah Johnson
Chief Growth Strategist at
Inovautus Consulting



Kris McMasters
CEO at
McMasters Consulting



Michael Platt
President of The Platt
Consulting Group, LLC



John Sensiba
Managing Partner at
Sensiba San Filippo, LLP

CONFERENCE AGENDA

Thursday, July 10, 2014

7:00 – 8:00 am Breakfast

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

8:15 – 9:30 am **Survive or Thrive? Developing a Successful Consulting Practice**
Sam Allred, Director at Upstream Academy

To thrive, firms in today's business climate need to move beyond traditional offerings. Keeping consulting from becoming a silo niche, with one expert and no depth, is challenging. How do you develop consulting services that are relevant and valuable to your clients? How do you get technical professionals excited about becoming "trusted advisors"? Join us for this session to learn the keys to developing a successful consulting practice.

9:30 – 9:45 am Break

9:45 – 11:00 am **Wishing Is Easy; Achieving Is Better**
Kris McMasters, CEO at McMasters Consulting

We've all probably tried the *strategy of hope*, creating plans based more on wishes than facts and hoping it all works out. But with competition and client demands rising each year, our strategic plans need a *leave nothing to chance* approach. How do you identify winning strategies and the right tools to turn those strategies into results? Join us for this session and learn concrete steps firms of all sizes can follow to ensure plans are well formed and effectively implemented.

11:15 – 12:30 pm **Cultural Quicksand: Buried in Denial**
Joey Havens, Executive Partner at Horne, LLP

AICPA surveys consistently cite owner/partner accountability as one of the top issues facing firms, and young professionals openly declare our profession "not worth the sacrifice." Are we trapped in our comfort zones and sinking into the quicksand of inaction due to weak vision and lack of passion for our mission? Isn't it time to trade busy-ness for impact, to let go of old ideas, and to lead with our hearts—not just our heads? In this presentation, Joey will uncover our comfort zones and question our beliefs and assumptions.

Thursday, July 10, 2014 (continued)

12:30 – 1:30 pm Lunch Break

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

More Than a Numbers Game: Motivating Partners with Compensation

Tim Bartz, Director at Upstream Academy

Partner compensation is always an issue in professional service firms and an area that demands constant attention. There are no silver bullets, but there are certainly some stagnant ponds when it comes to this key management function. This session will focus on the relationship between crucial partner behavior and your compensation system. Drawing on his many years of managing partners and advising firms, Tim will explain the key steps for setting up a system that rewards desirable partner behavior.

Training: Wonderful Opportunity or Necessary Evil?

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

Too often, firms spend so much time and energy ensuring that firm members meet minimum licensing requirements that they forget training should also motivate, develop, and prepare individuals for future leadership roles. How do you ensure you're getting the best return on investment for the resources you're devoting to training and development? Join Jonyce for this session and learn what works, what doesn't work, and how to identify and achieve your training priorities.

Client Service: Better Than the Rest

Sam Allred, Director at Upstream Academy

In an era of declining client loyalty, increased competition, and accelerating partner retirements, retention of quality clients is vital. Most firm leaders know clients seldom—if ever—walk away from exceptional service. But just what is "exceptional service," and how do you create a firm culture that accepts nothing less? What needs to change, and how do you achieve buy-in from every firm member? Join us for answers to these and other key questions.

CONFERENCE AGENDA

Thursday, July 10, 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, Kris McMasters & John Sensiba

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, July 11, 2014

7:00 – 8:00 am Breakfast

8:00 – 9:15 am **Marketing: Are You Getting Your Money's Worth?**
Sarah Johnson, Chief Growth Strategist at Inovautus Consulting

Many firms actively market their services, but few effectively measure the results of their efforts. To drive desired growth, you need to identify what you're doing well and also where you could improve. In this session, Sarah will show you how to measure results from some of the most common marketing tools—the web, social media, etc.—and discuss sales, communications, client loyalty and more. You'll also learn how to create a dashboard and interpret the data it provides. Join us!

9:15 – 9:30 am Break

9:30 – 10:45 am **A Peek Behind the Curtain: What Makes the "Best of the Best" Better?**
Michael Platt, President of The Platt Consulting Group, LLC

What's the secret behind the elite group of firms awarded "Best of the Best" standing? It takes more than size and profitability to land a place on *INSIDE Public Accounting's* (IPA's) "Best of the Best" list. Earning a spot on this prestigious list means a firm has learned to combine profitability with productivity, employee satisfaction, and sustainability. Join us for this session and learn IPA's philosophy on the metrics and best practices that impact a firm's overall health, well-being, and success, regardless of firm size.

10:45 – 11:00 am Break

11:00 – 12:15 pm **Joining the "Best of the Best": Applying the Principles**
Michael Platt, President of The Platt Consulting Group, LLC
Sam Allred, Director at Upstream Academy

We've examined the numbers and talked philosophy; now it's time for a practical look at the most effective ways to implement "Best of the Best" principles. Sam will join Mike in a frank conversation about the best (and worst) things they've seen firms do to try to move their numbers, and they'll share their personal thoughts on what firms should be doing to improve—not just in size, but in profitability, employee satisfaction, and firm sustainability.



THE LOCATION

Denver

The conference returns to Denver, the Mile High City, this year. With the beautiful Rocky Mountains as backdrop, Denver offers stunning architecture, award-winning dining opportunities, and an exciting array of pre- or post-conference recreation opportunities, including the 16th Street Pedestrian Mall, Larimer Square, the Denver Art Museum, Confluence Park, the Denver Zoo, Red Rocks Amphitheatre, and the Denver Museum of Nature & Science.

Hotel Information

This year's conference will be held at [The Ritz-Carlton Denver](#), located at 1881 Curtis Street in Denver. Reservations can be made by calling 800-265-1926 or [online](#) using group code UPAUPAA. Specify the Upstream Academy Conference to receive the special rate of \$229.00. We recommend making your reservation by June 18, 2014.

Air Travel Information

The hotel is located approximately 25 miles from Denver International Airport.



Conference Meal Information

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

To Register

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

Cancellation Policy

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

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 HeadWaters Conference you will be able to identify and implement improvements to your leadership skills, as well as your firm's leadership development processes.

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

