



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



July 11-12, 2019 • Denver, Colorado

HEADWATERS 2019

CREATING A CLIENT-CENTRIC FIRM

IS YOUR FIRM CLIENT-CENTRIC?

Most accounting firms strive to provide exceptional service.

The best firms recognize that *truly exceptional client service* requires an on-going commitment to people, processes and culture that promote a client-centric approach.

Join us in Denver, Colorado on July 11-12 and we'll explore how to remain relevant, competitive and profitable—both today and in the future—by focusing on client success.



CONFERENCE SPEAKERS/FACILITATORS

The Conference

Most firms value clients and promote the idea that their client service is the best available. But many hope that having the intention and making the statement is enough. If you put the words on the wall, the attitude will follow – right? Join us as we discuss how to ensure your firm becomes client-centric by changing attitudes, implementing processes and creating a client-centric culture that naturally promotes and produces exceptional client service.

During the HeadWaters Leadership Conference 2019, industry experts will provide step-by-step guidance to becoming and staying more client-centric. Here's a sampling of topics:

- Moving from firm-centric to client-centric
- Having frank conversations with clients and coworkers
- Helping firm members move from Gate Keepers to Gate Openers
- Providing better service by tracking the numbers that matter to clients
- Using data to more effectively serve clients
- Making clients raving fans
- Creating a better engagement evaluation
- Strengthening client relationships
- Ensuring the firm's success by helping the client succeed



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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



Tim Bartz
Director at
Upstream Academy



Martin Brown
President
of PYA



Steve Castino
Executive Shareholder
at Vestal & Wiler



Jeremy Clopton
Director at Upstream
Academy



Darci Congrove
Managing Director
of GBQ Partners LLC



Shari Harley
Founder & President
of Candid Culture



John Sensiba
Managing Partner
of Sensiba San
Filippo, LLP



Katie Sterling
Partner at
Wertz & Company LLP

CONFERENCE AGENDA

Thursday, July 11, 2019

7:00 – 8:00 am Breakfast

8:00 – 8:15 am Welcome

8:15 – 9:30 am **Client Centric: Powered by Culture**

Martin Brown, President of PYA

In today's marketplace, your competition is just a click away. Smart brands understand their strongest differentiator is building relationships through client-centric culture. But you can't simply impose a culture. Firm culture is built over time through leadership by example and stories of people empowered to stop labeling themselves and instead become problem solvers. Once instilled, a client-centric culture not only yields deeper, long-term relationships and referrals, but also internal benefits (stronger recruiting, employee retention and higher morale). And it's infectious. Join Marty as he shares how to get there.

9:30 – 9:45 am Break

9:45 – 11:00 am **How to Say Anything to Anyone**

Shari Harley, Founder and President of Candid Culture

Too often people become so focused on not offending anyone that they shy away from necessary communication. With insight and wit, Shari will provide eight easy steps to say anything to anyone. Get the words to ask clients and employees what they need and want, provide hard truths to help clients and team members succeed, give feedback to underperforming and high-potential employees, and resolve even the most difficult conflicts – and have these difficult conversations in a way that resonates.

11:00 – 11:15 am Break

11:15 – 12:30 pm **Inviting Opportunity: Moving from Gate Keeper to Gate Opener**

Sam Allred, Director at Upstream Academy

Firm stakeholders have a responsibility to protect clients. But many firm leaders become unpassable gate keepers by inadvertently "protecting" their clients from other firm experts, new service areas, resources outside the firm, and even hard truths. Join Sam as he explores how to empower and promote a "gate opener" mentality that invites innovation, growth and new opportunity both for the firm and the client.

12:30 – 1:30 pm Lunch

Thursday, July 11, 2019 (continued)

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

Numbers Matter: Moving Your KPIs to a Client-Centric Model

Steve Castino, Executive Shareholder at Vestal & Wiler

You only need to look at the recent bogus account opening scandal at Wells Fargo to realize that the numbers you track influence behavior. So are you tracking the numbers that will make a difference in client service? Or are you tracking numbers that matter to the firm but may impede client service? Join Steve for an insightful look at how using the right KPIs can drive a more client-centric firm.

Insight through Analysis: Better Client Service through Data

Jeremy Clopton, Director at Upstream Academy

It's easy to get overwhelmed by the volume and variety of data available – and clients are struggling with this same information overload. Data holds insights, if you know where to look. So how can you track and analyze the right numbers without getting bogged down in the weeds? Join Jeremy for an enlightening discussion of how to strategically assess data and leverage technology to provide better (more advisory) client service.

Turning Clients into Ambassadors: Creating Raving Fans

Katie Sterling, Partner at Wertz & Company LLP

Your firm has staunch supporters who need little prompting to speak well of you. But raving fans – clients who are so excited about your firm that they want to brag about you to anyone who'll listen—well, for most firms that's a different story. What is it that transforms a client into a raving fan (and keeps them raving)? Join Katie as she explores how to turn content clients into enthusiastic members of your unpaid sales force.



CONFERENCE AGENDA

Thursday, July 11, 2019 (continued)

2:45 – 3:00 pm Break

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

Sam Allred, Tim Bartz, Marty Brown, Jeremy Clopton, Darci Congrove, and 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 12, 2019

7:00 – 8:00 am Breakfast

8:00 – 9:15 am **Who Determines Success? Rethinking Your Engagement Evaluations**

John Sensiba, Managing Partner of Sensiba San Filippo, LLP

The engagement seemed to go well – profitable, on-time, and with everything signed and delivered. Your team breathes a sigh of relief and moves on. Which is why everyone is confused when the client's next engagement is with another provider. Join John for an in-depth discussion of how you can more effectively evaluate engagements to ensure success not just from the firm's point of view but also the client's.

9:15 – 9:30 am Break

9:30 – 10:45 am **Who Are These People? Improving Your Client Knowledge and Relationships**

Darci Congrove, Managing Director of GBQ Partners LLC

Relationships take work – and while you might not go into counseling to improve client relationships, there are proactive, actionable ways to ensure that your team grows to know clients better – including their staff, their culture and their top strategic issues. Join Darci for insights on how to improve your client processes to ensure you more easily forge deep, long-lasting and mutually beneficial relationships with your best clients.

10:45 – 11:00 am Break

11:00 – 12:15 pm **Making a Difference: Helping Clients Get Better at What They Do**

Jeremy Clopton, Director at Upstream Academy

If you want to improve client loyalty, cross-sell more services and cement your client relationships, you need to be able to help your clients – in ways that they can see and appreciate. Today's savvy client needs more than the basics of accurate tax and financial statement information to feel their accounting firm can help them get where they want to go. Join Jeremy for a discussion of how you can measurably help clients get better – in ways that they value and that will make an impact on their business.



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 Hyatt Regency Denver at Colorado Convention Center located at 650 15th Street in Denver, CO. Reservations can be made [online](#) or by calling 303-486-4701. You will need to specify Upstream Academy to receive the special conference rate of \$229.00. We recommend making your reservation by June 11, 2019.

Air Travel Information

The hotel is located approximately 27 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. You and your adult guest are also welcome to join us for the reception Thursday evening. 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 406-495-1850. Registration is \$1,195 for the first participant and \$995 for additional participants with discounts for UAN members.

Cancellation Policy

Registrants will be refunded their registration less a \$100 cancellation charge if they notify Upstream after June 13, 2019.

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.

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