



# PAST UAN MANAGEMENT PRESENTATIONS AVAILABLE FOR PURCHASE

Management Presentations address the key issues facing our profession and provide direction and ideas that can be immediately implemented in your firm. Each Management Presentation is a one-hour presentation on the topic by Sam Allred. The last ten minutes of the presentation typically include participants' questions related to the topic and knowledgeable answers drawn from Sam's many years of experience consulting and interacting with accounting firms around the world.

## Contents

Artificial Harmony: The Elephant Is Still in the Room (January 2010).....	6
Avoiding the Communication Tax: The High Cost of Poor Communication (June 2010) .....	6
Avoiding the Managing Partner Traps and Pitfalls (February 2014) .....	6
Becoming an Indispensable Part of Your Clients' Success (February 2018).....	6
Becoming the Employer of Choice in Your Market (June 2007).....	6
Best Practices for Building Rapport with Clients and Prospects (June 2018).....	7
Building a Culture of Discipline in Your Firm (June 2005) .....	7
Building a Strong Firm through Partner Unity (January 2016) .....	7
Building Firm Loyalty: The Vital Keys (Jan/Feb 2004).....	7
Building Firm Loyalty from Day One: Creating a Great Orientation Program (May 2015).....	8
Building Trust: Things Great Managing Partners Do (August 2012).....	8
Changing Your Business Development Culture from Selling to Helping (September 2014) .....	8
Choosing to Remain Independent: What Will It Take to Stay the Course? (September 2011).....	8
Conducting an Effective Partner Retreat (April 2004).....	8
Conducting Meaningful 360° Evaluations (November 2007) .....	9
Creating a Culture of Accountability in Your Firm (December 2011).....	9
Creating a Culture for Successful Client Transitions (June 2014).....	9
Creating a Firm of Excellence (October 2004).....	9

Creating a Firm-Wide Culture of Continuous Learning (March 2009).....	9
Creating and Communicating a Shared, Compelling Firm Vision (April 2006) .....	10
Creating and Implementing a Client Acceptance Policy (January 2012) .....	10
Creating and Sustaining a Culture of Self-Accountability (September 2004).....	10
Dealing Effectively with High Maintenance Partners (December 2010) .....	10
Dealing Effectively with Your Firm’s Underperformers (April 2007) .....	10
Developing a Client Service Plan for Your Best Client (September 2012) .....	11
Developing a Successful Women’s Initiative (September 2017) .....	11
Developing Partners Who Are Better Business Advisors (November 2017) .....	11
Developing Your Bench Strength: Effective Tools, Proven Strategies (April and May 2011) .....	11
Driving Change: Finding and Inspiring Your Firm’s Change Agents (December 2018).....	11
Driving Organic Growth by Creating Great Partner BD Goals (June 2016).....	12
Establishing a "Better Every Year" Mindset Firm-Wide (December 2017).....	12
Eventually You’ll Run Out of Ledge: Proactive Ways to Reduce Your Team’s Stress (January 2009) .....	12
Everybody Wins: Getting Partners to Pass Work to the Right Level (October 2010).....	12
Examples of Great Partner Goals (November/December 2012) .....	12
Exceptional Client Service: Getting the Entire Firm on the Same Page (May 2007) .....	13
Finding the Delicate Balance: Work and Life (November 2005).....	13
Fired Up, Not Burnt Out: Increasing Employee Engagement (February 2017) .....	13
Firing Your D-Level Clients: Everybody Wins (December 2005) .....	13
Firm Growth: Getting Your Partners Committed (and Excited!) (October 2011).....	13
Firm Success and Partner Goals: Making the Connection (September 2008).....	14
Getting Out of Crisis Mode: Time Management Strategies That Work (June 2017).....	14
Getting Past Parity: Treating Your Best as the Best (November 2011) .....	14
Getting Serious About Niches (September 2006).....	15

Giving Great Presentations: Hints, Tips and Strategy (February 2009) .....	15
Giving Your Best Clients the Best Service (December 2014) .....	15
Great Topics for Partner Retreats and Meetings (June 2013) .....	15
Hardworking, Loyal But Not a Star: Retaining Those Who Will Never Make Partner (August 2008) .....	15
Helping Those You Lead Envision a Great, Long-Term Career at the Firm (January 2018) .....	16
Hiring Your Firm’s Future: What to Look for Today (November & December 2008) .....	16
How Am I Doing? Evaluating Your Impact as Managing Partner (July 2010) .....	16
How Do You Measure Up? Becoming a High Performing Firm (February 2010) .....	16
How Many Partners Will You Need in Five Years? (June 2015) .....	16
How to Create an Annuity in a Consulting Practice (November 2015) .....	17
How to Prepare Your Partners for Successful Retirement (May 2016) .....	17
How to Stay Refreshed and Maintain Balance as a Leader (May 2014) .....	17
If You Build It, They Will Come (and Stay) (January 2015) .....	17
Improving Communication within Your Firm (October 2005) .....	17
Income Partners versus Equity Partners (January 2017) .....	18
Insights from the Last 100 Partner Retreat Facilitations (July 2012) .....	18
Is the Book of Business Culture Hurting Your Firm? (December 2016) .....	18
Jim Collins’ Rules for Your Bus: Getting Past the Talk (August 2013) .....	18
Joining Isn’t the Same as Staying: Making Re-Recruiting a Priority (July 2014) .....	18
Keeping Poor Performers: A Game Nobody Wins (July 2008) .....	19
Key Lessons Learned in Identifying, Developing and Retaining Top Performers (October 2018) .....	19
Key Principles and Best Practices for Partner Compensation (May and June 2011) .....	19
Key Principles of Effective Coaching (October 2007) .....	19
Making a Difference: What Every Coach Needs to Hear (September 2010) .....	19
Making Partner Meetings the Best Meetings You Attend (May 2008) .....	20

Making the Most of Every Team Member's Strengths and Talents (August 2009).....	20
Making Your Firm Governance Model Work for You, Not Against You (August 2010).....	20
Managing Partner Transition: Four Vital Keys for Success (February 2011) .....	20
Managing You Nonbillable Time to Produce Concrete Results .....	20
Mergers and Acquisitions: Things You'd Better Know and Understand (January 2011).....	21
Moving Away from the Book of Business Culture (December 2006) .....	21
Moving from Historian to Trusted Advisor (December 2013).....	21
New Partner Training: What the Best Firms Are Doing (January 2007) .....	21
Ownership: The Privileges and Responsibilities of Being a Shareholder (October 2003) .....	21
Partner Compensation: A Catalyst for Firm-Wide Change (October 2006) .....	22
Partner Evaluations: If Nothing Ever Changes: What's the Point? (December 2009) .....	22
Partners: Beware of CAG! (July 2013).....	22
Playing to Partner Strengths: Examples That Make Sense (November 2013).....	22
Principles of Personal Development: Making the Most of Your Career (May 2009) .....	22
Proactive Steps to Ensure Partners Retire Successfully (September 2018) .....	22
Profitable Growth: What High Performance Firms Are Doing (May 2013).....	23
Rating Your Clients A to D: Why and How (October and November 2013) .....	23
Re-inventing Your Client Services (August 2015) .....	23
Removing the Mystery from Your Path to Partner Program (September 2009).....	23
Stop Conducting Perfunctory Performance Reviews (September 2007) .....	23
Stop Indulging the Soloists: Specific Ways to Create a One-Firm Culture (August 2016) .....	24
Strategic Marketing: A Process That Makes a Difference (July 2009) .....	24
Strategies for Improving Client Payments (January 2014) .....	24
Strategies for Turning Busy Season into Opportunity Season (December 2003).....	24
Succession Planning - The Vital Keys to Success (May 2004) .....	25

Successfully Merging Different Cultures (May 2017) .....	25
Ten Keys to Creating Raving Fans (December 2004) .....	25
Ten Proven Ideas for Building Firm Culture (Jan /Feb 2005).....	25
The Best 7 Things to Do to Reduce Underperformance (December 2012).....	25
The Best Approach to Firm Strategic Planning (October 2016).....	26
The Best Strategy for Maximizing Key Leadership Positions (February 2016) .....	26
The Best Way to Develop Future Rainmakers (September 2013).....	26
The Biggest Barriers in Launching and Growing Niches (August 2014).....	26
The Case for Part-Time Partners (August 2017) .....	26
The Five Highest Uses of Your Time as Managing Partner (Jan 2013) .....	27
The Partner Sabbatical: A True Win/Win/Win (May 2006).....	27
The Proper Way to Evaluate Firm Culture (October 2012) .....	27
The Ten Worst Habits of Otherwise Good Leaders (June 2012) .....	27
The Top Messages Your Partners Must Hear (July 2018) .....	27
Training for the Future: The Best Way to Rapidly Develop Your People (September 2016) .....	28
Transition Planning for Retiring Partners (January 2006) .....	28
Transitioning Clients at Partner Retirement: Getting It Right (April 2008) .....	28
What Are the Biggest Paradigms Holding Firms Back? (May 2018) .....	28
What Every Firm Needs to Know About Proactively Preparing for Busy Season (November 2009).....	28
What It Means to Be a High Performing Partner (April 2009).....	29
What Should You Be Doing with Your B and C Clients (October 2015).....	29
What to Do When Partners Can't Seem to Get Along (July/Aug 2011).....	29
What to Do When Payroll Rates Rise Faster Than Billing Rates (September 2015).....	29
What's the Best Use of Partner Time? (April /May 2012) .....	29
Why Firms Are Re-thinking Their Recruiting Strategy (April/May 2013) .....	29

World Class Training: Getting Your Firm on Track (Feb/Mar 2007) ..... 30

Written Standards: Getting Beyond the Talk in Improving Performance (April 2010) ..... 30

### **Artificial Harmony: The Elephant Is Still in the Room (January 2010)**

You can't beat harmony, especially among the firm's owners, right? Actually, wrong—if achieving that harmony comes at the expense of openly and honestly discussing and resolving important issues.

Why do we work so hard to avoid conflict? How can you determine if artificial harmony is a problem in your firm? What are some of the most commonly ignored elephants and what do you, as a leader, need to do to remove artificial harmony from your firm? These are just some of the important questions we'll answer in this presentation—don't miss it!

### **Avoiding the Communication Tax: The High Cost of Poor Communication (June 2010)**

Artificial harmony. High turnover. Plenty of support for key endeavors, but little commitment. Performance issues that never seem to get resolved. These challenges, all symptoms of poor communication, cost your firm more than you ever dreamed. And yet, many leaders fail to see communication skills—or the lack thereof—as the root cause of these and other problems. This presentation explores how improved communication skills can make a difference in your firm and what you can do to make improvement a reality.

### **Avoiding the Managing Partner Traps and Pitfalls (February 2014)**

In all likelihood, it's the most satisfying leadership role you've ever played—and also the most challenging. What should your attention be focused on as managing partner? What things are most likely to pull you off track? What are the icebergs, the traps and pitfalls that may not appear particularly threatening but have the potential to do real damage, both to you as a leader and to the firm? You won't want to miss this presentation.

### **Becoming an Indispensable Part of Your Clients' Success (February 2018)**

The accounting profession is facing decreasing client loyalty and increasing competition. But there's good news. Clients seldom—if ever—walk away from exceptional service. And those who can consistently discover ways to help their clients' businesses succeed find that clients not only provide seats at the table but also send quality referrals. So what can you do to help your clients become more successful, rather than just more compliant? What can you do to ensure that your firm focuses on the clients' outcomes, rather than the firm's output? Join Sam as he discusses proactive ways to become a key player in your clients' success.

### **Becoming the Employer of Choice in Your Market (June 2007)**

In today's challenging business climate, many firms are expending enormous resources to attract and hold on to quality employees. What if your firm was known as the employer of choice in your market? How would such a reputation impact your recruitment and retention efforts, help build firm culture, and strengthen firm unity? Do you have a strategy in place for becoming the employer of

choice in your market, and are you confident that strategy will take you where you want to go? Learn what you need to do to become the employer everyone else talks about.

### **Best Practices for Building Rapport with Clients and Prospects (June 2018)**

Bringing in new business doesn't necessarily mean long term income. But building a strong relationship with a client or prospect can mean more repeat business, better quality referrals and a more enjoyable interaction (for both sides). Being able to quickly establish rapport with clients and prospects can help you move from being viewed as a vendor selling a product to an advisor providing knowledgeable advice based on your desire to help – laying the groundwork for a strong, trust-based, future relationship. Join Sam as he discusses how to start off (and stay) on the right foot with clients and prospects.

### **Building a Culture of Discipline in Your Firm (June 2005)**

Discipline is one of the qualities that enables firms to continually improve who they are and what they do. Even in the most challenging times and circumstances, the discipline to consistently get things done will help a good firm become a great firm. What's the current level of discipline in your firm? What are the biggest issues you face? More importantly, what are you doing to resolve those challenges—and are you confident the discipline exists firm-wide to implement the right solutions? Learn the important principles and key steps you need to follow to build a culture of discipline in your firm.

### **Building a Strong Firm through Partner Unity (January 2016)**

As Lou Holtz noted, "It's tough enough getting the boat to shore with everybody rowing, let alone when a guy stands up and starts putting his life jacket on." Unfortunately a lack of partner unity can land you in just this situation. Partner disunity can lead to artificial harmony, paralyzing lack of direction, floundering firm initiatives, demoralizing firm culture, meetings after the meeting that derail any group decisions – and ultimately decreased profitability. So how do you help your partners come together as a group? And how do you institutionalize the principle of unity so it becomes a cornerstone of your partners' philosophy? Learn the principles and best practices to help unify your partner group and keep them rowing toward a common shore.

### **Building Firm Loyalty: The Vital Keys (Jan/Feb 2004)**

A famous television commercial from some years ago informed viewers that a particular financial services company made money the old-fashioned way: "They earned it." It's much the same with firm loyalty—but just how do you earn it? What is firm loyalty and why is it so important? What can you do to build it, and what are the mistakes firms make that destroy loyalty? Take a look at this key firm issue.

### **Building Firm Loyalty from Day One: Creating a Great Orientation Program (May 2015)**

At the end of their first day, how would your recruits answer this question: Did you pick the right place? If most would be uncertain or even question their choice, your orientation program isn't fulfilling its primary purposes: building loyalty from day one. Employee orientation programs have tremendous potential to motivate, engage and excite your new employees by highlighting core values, extolling the firm's culture, and explaining the unique advantages of our profession. To realize that potential, however, firms must have a clear understanding of what they are trying to achieve. Learn strategies and steps to make your orientation program memorable, engaging and loyalty-building from day one.

### **Building Trust: Things Great Managing Partners Do (August 2012)**

Trust: like the weather, everyone talks about it. But unlike clouds and sunshine, there's a great deal managing partners can do about trust. How does a great leader build trust with individual partners? How do you develop and maintain a high level of trust with the partner group as a whole? And what about building trust with managers, staff consultants, admin personnel, and others? Hear insights on this important issue.

### **Changing Your Business Development Culture from Selling to Helping (September 2014)**

For decades, our profession has equated business development with selling. That mindset has created discomfort for many and discouraged some of our best and brightest from advancing in their careers. With the fast-approaching retirement of many of our best rainmakers, it's time for a new paradigm, one that emphasizes team effort and focuses on helping rather than selling. It seems like such a natural—most people would rather help than sell—but how do you make it happen in your firm?

### **Choosing to Remain Independent: What Will It Take to Stay the Course? (September 2011)**

Mergers and acquisitions have become routine occurrences across our profession in recent years. But what if you want to buck the trend? What does being a legacy firm mean in such critical areas as succession planning, bench strength, business development, and technology? What do you need to do now to help ensure the future independence of your firm? These are just some of the crucial questions we'll answer in this presentation.

### **Conducting an Effective Partner Retreat (April 2004)**

Away from the press of client needs, staff requests, ringing telephones, and emails waiting to be answered, partner retreats offer a great forum for celebrating past successes, pondering the present, and charting a course for the future. The unfortunate reality is that all too often, we don't really take full advantage of the opportunities provided by these important events. This presentation will help you avoid the most common mistakes firms make in planning partner retreats and give you solid tips on how to make your next retreat the best your firm has ever had.



### **Conducting Meaningful 360° Evaluations (November 2007)**

Most firm leaders and employees sincerely want to be more effective. Unfortunately, traditional top-down performance evaluations frequently fail to give individuals the very feedback they need most to develop their strengths, identify blind spots, and make course corrections. What are the keys to creating an effective 360° evaluation process? How do you get buy-in and participation from both employees and owners? What are the pitfalls that must be avoided to gain maximum benefit from the process? Learn the answers to these and other vital questions about 360° performance evaluation systems.

### **Creating a Culture of Accountability in Your Firm (December 2011)**

Few would dispute that a strong culture of accountability is essential if firms are to prosper in today's challenging business environment. Unfortunately, far too many firms mistake marginally effective (and very expensive!) babysitting for a true system of accountability. How do you create a culture of accountability? What are the key elements that must be present, and what role do partners play in the success of such a system? Listen in as we explore this topic.

### **Creating a Culture for Successful Client Transitions (June 2014)**

With ever-growing numbers of partners preparing for retirement, firms must either learn how to successfully transition clients or risk losing them to competitors. Much of our attention has been focused on the partner making the hand-off; but what about the individual receiving the client and the firm culture supporting client transitions? Learn how to change your culture and prepare receiving individuals for successful client transitions.

### **Creating a Firm of Excellence (October 2004)**

There's no question in your mind—or in the minds of your partners—that your firm has the potential to be excellent, even world class. You're just not sure how to get there, or perhaps even where to begin. While excellence will certainly never be magically attained by listening to a one-hour session, this presentation will teach essential principles, explain critical steps to be followed, and help you chart a course that will take you where now you only dream of going. This presentation takes a fresh look at excellence and what is required to help your firm achieve it.

### **Creating a Firm-Wide Culture of Continuous Learning (March 2009)**

With the demands of deadlines, client needs, and charge hour budgets, it's easy for ongoing skill building to feel more like an obligation than an opportunity. How do you create a firm-wide culture that encourages and rewards continuous learning? How do you foster an appetite for training and skills development throughout your organization? What should you be doing now and in the future to encourage firm members to become recognized experts in their fields? Find out by listening to this presentation.

### **Creating and Communicating a Shared, Compelling Firm Vision (April 2006)**

Despite its tremendous potential to bring about positive change, many firms still lack a shared, compelling vision that everyone in the firm understands and is excited about. How do you go about creating such a statement? What are the key elements of a firm vision statement? How does vision relate to strategy? How do you ensure your vision reaches into every corner of the firm? What are the pitfalls that must be avoided? This presentation will put you on the path to creating a vision that excites everyone in the firm.

### **Creating and Implementing a Client Acceptance Policy (January 2012)**

Lots of firms talk about client acceptance policies as if they had them and were using them. The reality is that for many firms, “client acceptance process” means filling out the right form after work for the new client has already begun. A well written, carefully followed client acceptance policy pays huge dividends for the firm, both short- and long-term. How do you develop and successfully implement such a policy, and what must that policy contain? If you’re interested in adding quality clients—and who isn’t?—this presentation will help!

### **Creating and Sustaining a Culture of Self-Accountability (September 2004)**

David Maister has wisely observed, “If people are not prepared to be held accountable for what they do, it is unlikely they will achieve much.” Of the many characteristics that distinguish excellent firms, one of the most striking we’ve noted is that such firms have a strong culture of self-accountability and that their employees want to be held accountable. What key principles form the foundation of such a culture? What barriers must be overcome in establishing a culture of self-accountability, and once you’ve created it, how do you maintain it? This presentation will help you understand how to create a firm culture that encourages self-accountability.

### **Dealing Effectively with High Maintenance Partners (December 2010)**

Nearly every firm of any size has them: the partners who answer to nobody, the prima donnas, the people who feel entitled to whatever they want, the individuals who say little in meetings but have lots to say afterwards, etc. Sound familiar? The results of this behavior—weakened culture, challenges within the ranks, diminished firm unity, for starters—probably also sound familiar. This presentation will identify the most common mistakes firms make in dealing with this issue, discuss key principles, and provide a solid process for addressing this challenging problem.

### **Dealing Effectively with Your Firm’s Underperformers (April 2007)**

Underperforming employees—individuals who have the ability to truly help but for some reason aren’t living up to their potential—exist in virtually every firm. What are the causes of underperformance? How does it usually manifest itself, and why is it so important to deal with underperformance promptly and properly? What key principles and essential steps do you need to understand to respond effectively to underperformance in your firm? Learn what you can do to help your underperformers reach their full potential.

### **Developing a Client Service Plan for Your Best Client (September 2012)**

How many times have you heard it (or perhaps said it yourself): “Give me a call if I can help”? Welcome to the world of reactive client service. What do you need to do to make the transformation from reactive to proactive service? What are the key elements in a client service plan and how do you get everyone on board so you can truly help clients accomplish their goals? During this presentation, we’ll share insights on building a proactive, customized plan for your A-level clients.

### **Developing a Successful Women’s Initiative (September 2017)**

Even though over 60% of accountants and auditors are female, less than 20% of current partners are women and even fewer women achieve equity status. Yet too often when firms discuss “women’s initiatives” they bring up maternity leave and flexible work schedules – then close the book on the subject. Today’s accounting firms have a lot more to discuss. Join Sam as he discusses practical ways to handle differing expectations, work styles, schedules, advancement choices, and communication norms to propel high performing women into firm leadership positions, making a huge impact on your firm’s ability to stay relevant and attract quality employees.

### **Developing Partners Who Are Better Business Advisors (November 2017)**

You know that the world of client service is changing, so your firm has committed to becoming proactive, forward-thinking business advisors. So how do you implement this firm-wide? What do you need to do to encourage partners (and others in the firm) to develop expertise that is relevant and valuable to clients, so they can proactively analyze current client service offerings, evaluate potential new client needs and not just guide clients through their accounting questions but also offer innovative strategies for business growth, team development, succession planning and financial management? Join Sam as he discusses what needs to be in place for you to become a firm of business advisors.

### **Developing Your Bench Strength: Effective Tools, Proven Strategies (April and May 2011)**

Bench strength. Most leaders understand the concept, but far too few are proactively doing what’s needed to develop the strength their firms will need 5, 10, or even 15 years down the road. How do you correctly measure and monitor bench strength? What do you need to do to ensure that those who have the ability to become owners receive every possible opportunity to achieve their potential? What are the significant generational differences you need to understand, and how do you factor them into your planning? This presentation will help you build a plan for your future partners.

### **Driving Change: Finding and Inspiring Your Firm’s Change Agents (December 2018)**

Change agents are a unique find – those who don’t just tolerate change but embrace it, those with a clear, persistent, realistic vision of the benefits of change, those who build excitement and consensus by carrying that vision to others. We need change agents, yet too often we stifle their abilities – throttling them back when we should be steering them in the right direction and letting them drive

change. So how do you find these uniquely talented people within your firm? More importantly, how do you build a culture that encourages them to use these talents to the firm's benefit? Join Sam to learn how to discover and inspire your best allies in the ever-changing firm landscape.

### **Driving Organic Growth by Creating Great Partner BD Goals (June 2016)**

Business development is an "all hands on deck" activity and no partner should be allowed to opt out. The goal is to maximize each partner's horsepower to bring in good new business for the firm from existing clients and prospective clients. The key is to develop effective business development goals for each partner that maximize his/her strengths and lead to measurable results. This presentation explains about how to develop the right BD goals for each partner, as Sam shares examples of exceptional partner business development goals and discusses the best way to set goals that ensure the business development results you desire.

### **Establishing a "Better Every Year" Mindset Firm-Wide (December 2017)**

A firm's culture is the unwritten handbook for members and it's assembled page by page not only through official policies and communication but by how the firm (and its leaders) reward results, manage priorities and deal with issues. So does your culture encourage and reward those who are striving to make every aspect of your firm better every year? Or, are you unintentionally telling staff that good is good enough? Join Sam as he discusses how to engage everyone and help them embrace the belief that they can and should proactively work to make themselves and the firm better every year.

### **Eventually You'll Run Out of Ledge: Proactive Ways to Reduce Your Team's Stress (January 2009)**

Total hours worked are up, charge hours remain flat, partners and rainmakers are retiring right and left forcing many of us to assume new, less than comfortable roles, and we frequently find ourselves struggling to meet the high, sometimes surprising expectations of a new generation of employees. But other than those and another dozen or so factors, there's no stress in our lives. Learn how to keep your team members—and yourself—off the ledge.

### **Everybody Wins: Getting Partners to Pass Work to the Right Level (October 2010)**

Most partners spend 50-80% of their time doing work someone else could do. The result? Other less experienced firm members are denied growth opportunities, partners remain securely in their comfort zones, and the horsepower that only partners can bring to new opportunities remains largely untapped. And most sadly, heights the firm might have reached are never realized. Learn solutions to this ongoing challenge.

### **Examples of Great Partner Goals (November/December 2012)**

Most firm leaders know how important great partner goals are. They just don't know how to create them or effectively use them to get the best results for the firm. How do you change a goal from

subjective to objective, include the right amount of detail, and ensure that progress on achieving the goal is measurable? How do you make sure each partner has the right goals? Let us help you transform poor partner goals into great ones!

### **Exceptional Client Service: Getting the Entire Firm on the Same Page (May 2007)**

In an era of declining client loyalty, increased competition, and accelerating partner retirements, retention of quality clients is an issue of ever-greater importance for many firms. Most firm leaders know intuitively that clients seldom—if ever—walk away from truly exceptional service. But just what is “exceptional service,” and how do you create a firm culture that accepts nothing less than that? What paradigms need to change, and why is buy-in from every firm member so critical to providing this level of service? Why are client service standards so important and how do you create and implement them? Learn the answers to these and other vital questions about exceptional client service.

### **Finding the Delicate Balance: Work and Life (November 2005)**

Numerous studies in recent years have revealed that Americans are working more but enjoying it less. Unfortunately, achieving a healthy balance between our work and the rest of our lives seems to be especially challenging for us as accountants. This presentation discusses the danger signals to watch for, the key principles that govern work/life balance, and the vital steps you'll need to follow to restore that balance.

### **Fired Up, Not Burnt Out: Increasing Employee Engagement (February 2017)**

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 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? Explore what engagement means and how you can harness its power.

### **Firing Your D-Level Clients: Everybody Wins (December 2005)**

Firing a client—any client—is seldom something we enjoy doing. After working so hard to bring them in the front door, helping a client exit out the side door seems contrary to our natural instincts. Yet it's a sound business practice with huge dividends for employee morale, retention, recruitment and teamwork, for firm unity and culture, for the firm's bottom line, and even for the former client. And it's not that hard to do well; this presentation will teach you how to do it right.

### **Firm Growth: Getting Your Partners Committed (and Excited!) (October 2011)**

Most would agree that it's hard to accomplish anything of significance in the firm without the enthusiastic commitment of the partner group. Why is this particularly true when it comes to growing

the firm? What commitments—time, money, effort, etc.—do partners need to be willing to make to effectively position the firm for growth? Listen as Sam discusses the topic that's keeping firm leaders awake at night!

### **Firm Success and Partner Goals: Making the Connection (September 2008)**

In most firms, partners comprise the single most underutilized group. How can this be? Collectively, partners possess a depth of talent, diversity of skills, and richness of experience unmatched by other firm members, giving them tremendous potential to move the firm forward. Unfortunately, that potential often remains untapped because firms fail to take advantage of the great opportunities presented by partner goal setting. How do you connect partner goals to firm success? Find out how it's done.

### **Getting Out of Crisis Mode: Time Management Strategies That Work (June 2017)**

The competition for your time and energy is intense. When everything feels urgent and important, days can pass without any feeling of accomplishment, progress or growth. So how do you get out of the hamster wheel? How can you move from what Stephen Covey calls Quadrant I (where crisis, deadline-driving projects and stress live), into Quadrant II (where you can plan, prepare, prevent and build)? It doesn't require you to abandon your firm. And doesn't mean adding more hours to your already full day. Join us for the next Management Presentation and Sam will discuss practical, actionable ways to get off the hamster wheel.

### **Getting Past Parity: Treating Your Best as the Best (November 2011)**

It's a lesson all too many firms have learned: parity does little more than help ensure your best people will go someplace else to receive the opportunities and recognition you failed to give them. How do you identify your best people? In what ways should your top performers be treated differently? What should their goals and career paths look like and how should their performance be evaluated? How do you treat your best like the best they truly are? Learn how to ensure that your best people know they have a bright future at your firm.

### **Getting Serious About Niches (September 2006)**

Most niche services have enormous potential to be profitable ventures, and yet many fail. Why do so many niches fall far short of expected results? What are the vital keys and principles that must be applied to help ensure the success of niche services? How should you identify the proper niche leadership? What's the correct way to manage the firm's investment in the niche? What are the essential processes firms need to follow to successfully identify, launch, and grow niche services? How do you take an existing niche to the next level? This presentation answers these and other important questions about niche services.

### **Giving Great Presentations: Hints, Tips and Strategy (February 2009)**

Whether it's to deliver important information, teach a skill, advocate a position, or influence client decision-making, nearly every professional has opportunities to present to groups. The ability to be effective in such settings enhances careers and adds value to the firm. What do you need to do to be fully prepared for opportunities to make group presentations? How can you identify (and avoid) your personal pitfalls? What are the steps you need to follow to help ensure success? Learn how to make your next presentation a great one!

### **Giving Your Best Clients the Best Service (December 2014)**

What are you willing to do for your best clients that you wouldn't do for all the rest? If you struggle to answer this question, you're in good company. Getting past parity is hard, but maintaining it ties the firm's hands and makes it impossible to give A-level clients the service they deserve. This presentation will discuss key principles and provide solid recommendations of things you can start doing today to give the best service to your best clients.

### **Great Topics for Partner Retreats and Meetings (June 2013)**

The impact of partner meetings on the firm can't be overemphasized. What should you be talking about at partner retreats and similar gatherings? What are the topics that will challenge partners and stretch their thinking? What subjects are most likely to produce meaningful discussions, innovative strategies, and important course corrections? Ready to re-think your next partner meeting? Learn topics proven to take your partner retreat to the next level.

### **Hardworking, Loyal But Not a Star: Retaining Those Who Will Never Make Partner (August 2008)**

With so much attention focused on retaining those who have the greatest potential to become owners, it's easy to neglect another very important group of employees: the solid, capable individuals who keep the engine running smoothly but because of skill gaps, temperament, or other circumstances are unlikely to ever be considered for ownership. How do you address parity and similar issues, ensure you don't lose your star performers, and hang on to those who will never be owners—all at the same time? Explore how to retain this important group.

### **Helping Those You Lead Envision a Great, Long-Term Career at the Firm (January 2018)**

Our profession is demanding and time-intensive. Yet many young professionals lured away by industry or government regret losing those things they took for granted – and never ever get to experience the benefits of what can be a rewarding, diverse career at the firm. The youngest generations are more mobile than the generations that preceded them. So what can and should you be doing to extend the time individuals spend with your firm. How can you help new hires see the firm as a long-term career choice? Don't continue to hire and lose top talent. Join Sam as he discusses how to ensure that your young professionals understand the benefits and maintain excitement at the possibility of a long-term career at your firm.

### **Hiring Your Firm's Future: What to Look for Today (November & December 2008)**

You don't need a crystal ball to see the future of your firm. Just look at who you hired last week and last year: they are your firm's future. Are you selecting the right people, those who will carry on what you and others have worked so hard to achieve? Are you hiring individuals who will raise the bar of excellence not just today but five, ten, or fifteen years from now? Do you understand what can be taught and what must already be securely in place in a potential employee long before the interview begins? Find the answers to these and other important questions about the future of your firm.

### **How Am I Doing? Evaluating Your Impact as Managing Partner (July 2010)**

Most managing partners sincerely want to know how they're doing. Unfortunately, few firms have a well-defined process in place for providing feedback. What are the managing partner's most important responsibilities, and how should they be addressed in the evaluation process? What criteria should be used to evaluate a managing partner's performance? Who should do the evaluation, and how should it be conducted? If you are your firm's managing partner/CEO, learn how to ensure you make a noticeable, positive impact on your firm's performance.

### **How Do You Measure Up? Becoming a High Performing Firm (February 2010)**

Challenging economic times have focused a bright light on firm performance, and many leaders are concerned about what that light has revealed. What does it mean to be a high performing firm? Are there clear indicators you can count on to help gauge your firm's progress toward its goal of high performance? What are the keys to success and the pitfalls you must avoid to take your firm where you know it needs to go? Listen to insights on how your firm can join the ranks of high performing firms.

### **How Many Partners Will You Need in Five Years? (June 2015)**

It's a question that haunts many managing partners: Do we have the right number of staff with partner potential and appropriate talent to ensure a strong healthy firm in the future? If you don't have a clear vision of your partner group's future size and makeup, it's almost impossible to plan farther than a couple years or to treat partner development with the seriousness it deserves. Don't play the guessing game. Learn how to accurately determine the strength your firm will need 5, 10 and



even 15 years down the road, and how to use this information to motivate partners and other key players to do what needs to be done to perpetuate the firm.

### **How to Create an Annuity in a Consulting Practice (November 2015)**

Since consulting practices are not doing compliance work, common wisdom assumes that everyone must constantly work to bring in new business. It's almost like consulting practices start from scratch each year, right? Not necessarily. What if there were ways to create a steady stream of income long-term, so you could concentrate on maximizing your service offerings and exploring new opportunities rather than constantly searching for new income? During this presentation Sam shares a better way to build business. Learn what the best consulting practices are doing to get away from reliance on billable rates, to create long-term annuities and leverage their best offerings.

### **How to Prepare Your Partners for Successful Retirement (May 2016)**

We've all seen them – the semi retirements. Rather than a smooth, well-planned transition to a well-planned post-retirement life, partners give up equity and continue as if nothing has changed – working the same hours and serving the same clients in the same offices with the same comp – leaving everyone wondering: When will they actually retire? So how do you ensure your partners make a smooth, healthy transition that not only allows them to enjoy retirement but makes way for the next generation of leaders and the continuity of the firm? Learn the best practices, policies and timeline for a successful partner transition.

### **How to Stay Refreshed and Maintain Balance as a Leader (May 2014)**

Leadership exacts a heavy toll. Nobody needs to tell you that—you live it every day. With all of the competing demands, tight deadlines, challenging goals, meetings, budgets, etc. that are so much a part of your life as a partner, how do you maintain balance? Whether you're a new partner or a seasoned one, how do you keep the passion and avoid burnout? Learn proven strategies for achieving and keeping balance in your life.

### **If You Build It, They Will Come (and Stay) (January 2015)**

We've all come to realize that the next generation doesn't view loyalty like generations of the past. Those that worked steadfastly at the same job for 40 years with the promise of a gold watch waiting at the end are retiring both from our firms and from our clients' businesses. The next generation is mobile and constantly looking for new opportunities (both within your firm and elsewhere). Fortunately your firm can still attract the best people and make them want to stay. Learn the steps necessary to move toward your ideal firm – a firm that draws the best people and clients, allows them to thrive and makes it hard for them to contemplate ever leaving.

### **Improving Communication within Your Firm (October 2005)**

Although it may not top their list of concerns, most firm leaders recognize the impact communication has on many of the issues that are keeping them up at night: firm unity, culture, and morale, trust in

the firm's leaders, recruitment and retention—to name just a few. Sadly, we often become so focused on external communication that how we communicate within our own walls gets little attention. Learn the symptoms of poor communication, key principles of effective communication, and steps you can follow to improve communication within your firm.

### **Income Partners versus Equity Partners (January 2017)**

Offering promising young talent full equity partnership is not always the best choice for the firm or for the individual. Done correctly, however, creating income partners can be a great solution – providing your rising stars increased credibility, status, compensation and voice – without waiting for them to have the top line revenue to sustain their admission as full equity partners. Learn who might be the ideal candidate for income partner, how to differentiate income vs. equity partnership, how to communicate the new status, and any pitfalls to avoid.

### **Insights from the Last 100 Partner Retreat Facilitations (July 2012)**

As one of the profession's most sought-after consultants, Sam Allred has facilitated hundreds of partner retreats, giving him a unique window into what makes firms great and what holds them back. In this presentation, Sam discusses the most impactful things firms do, what has impressed him the most as he's worked with firms, and the things that have concerned him the most. Learn from his experience, how to make your next retreat the best yet.

### **Is the Book of Business Culture Hurting Your Firm? (December 2016)**

Entrenched partners may claim that building long-term relationships with clients can't hurt the firm, but those firms still holding onto a book of business culture will give you first-hand accounts of how allowing partners to monopolize clients can drag the firm down – as partners (and clients) retire, as Rainmakers become Mistmakers, and as young leaders decide they can find better opportunities at firms with more client opportunities and a team approach. If your firm's still struggling to make the move from BOB, listen in. Learn why to change, when to change and the best ways to gradually move your firm toward a more team-centered (and ultimately more profitable) firm.

### **Jim Collins' Rules for Your Bus: Getting Past the Talk (August 2013)**

Everybody knows Jim Collins' rules—get the right people on the bus, the wrong people off, and everyone in the right seat—and most of us can talk about the rules with passion. The challenge is in “the doing.” Collins' advice isn't easy. Getting the wrong people off the bus is a struggle for most firms, and getting everyone in the right seat is no cake walk, either. Get some great advice on how to apply Jim Collins' rules in your firm.

### **Joining Isn't the Same as Staying: Making Re-Recruiting a Priority (July 2014)**

Top talent have lots of options and while most firms devote significant resources to recruiting and hiring the best, unfortunately, few firms pay as much attention to re-recruiting those same great

employees. What are you doing to recognize your best people and convince them that their contribution is important and valued? Learn what the best firms are doing to re-recruit their top talent every day.

### **Keeping Poor Performers: A Game Nobody Wins (July 2008)**

In today's ever more challenging labor market, it's easy to justify hanging onto someone you really ought to let go; how else is all the work going to get done? But what's the true impact—on clients, on coworkers, on the firm as a whole—when you keep a poor performer on the payroll? How can letting someone go be a win for everyone, including the departing employee? Find out the answers to these and other important questions!

### **Key Lessons Learned in Identifying, Developing and Retaining Top Performers (October 2018)**

Every firm has someone they wish they could clone: low maintenance, high performing superstars who are often so efficient, driven and unflappable that they are taken for granted – put on the worst clients (because even D-clients love them) and assigned the difficult tasks (because they consistently do an exceptional job despite the difficulty/tedium/rush of the task). Unfortunately, firms can't rely on a medical miracle to provide back-ups for these superstars. Instead, you need a proactive plan. Join Sam as he stretches your thinking in the areas of identifying, developing and retaining your “clone-worthy” top performers.

### **Key Principles and Best Practices for Partner Compensation (May and June 2011)**

Few would dispute that compensation has the potential to drive performance and significantly impact the results obtained by the firm's greatest source of horsepower, the partner group. While there's no single best way to deal with all of the issues related to partner compensation, there are key principles and best practices that must be understood and applied if you want your system to produce the desired results. Learn best practices for partner compensation.

### **Key Principles of Effective Coaching (October 2007)**

While agreeing nearly universally on the value of an effective coaching program, most firm leaders are quick to acknowledge that their current efforts to provide such a program fall short of the mark. What does it take to be the kind of coach who truly makes a difference in people's lives and careers? How can a skilled coach help individuals maximize their strengths, minimize their weaknesses, and become more effective and productive? Learn how to transform your current coaching program into the powerful tool you've always known it could be.

### **Making a Difference: What Every Coach Needs to Hear (September 2010)**

Most leaders agree on the great value and potential benefits of effective coaching. Unfortunately, far too many firms have weak coaching programs. Where—and why—do firms go wrong? What are the secrets to developing a powerful coaching program for your employees, one that will truly make a

difference? What does every coach need to know to be successful? Learn how to revamp your firm's coaching program.

### **Making Partner Meetings the Best Meetings You Attend (May 2008)**

Partner meetings ought to be the most productive meetings we attend. Unfortunately, this is seldom the case in all too many firms. What changes do you need to make to ensure that partner meeting time is spent productively, that key issues are openly and honestly discussed, and that sound decisions are made and properly implemented? Learn what you can do to dramatically improve your owner meetings.

### **Making the Most of Every Team Member's Strengths and Talents (August 2009)**

As a leader, you recognize that every member of your team possesses a unique combination of strengths, talents, weaknesses, and challenges. You also know—intuitively and by experience—that playing to team members' strengths will always produce the best results, both individually and for the firm. But how do you do that? How do you identify a person's greatest strengths and then determine how to effectively use those strengths to better serve clients and build the firm? Answer these and other key questions about how to fully utilize the talents of every member of your team.

### **Making Your Firm Governance Model Work for You, Not Against You (August 2010)**

Firm governance is all about making good decisions. What are the biggest challenges in firm governance, and what can you do about them? Which systems work best for small firms, large firms and those in-between? Which decisions do all partners need to weigh in on? Learn best practices should you follow in firm governance, and how do you make the transition from one system to another.

### **Managing Partner Transition: Four Vital Keys for Success (February 2011)**

Transitioning to a new managing partner is a challenge that will face hundreds of firms in our profession over the next decade. What's your strategy for successfully managing this significant change? What should you be proactively doing right now to identify the next managing partner and prepare that person to take over the reins of leadership—even if that change won't occur for another 5-7 years? How do you prepare the other partners for this transition, and what things need to be in place to provide the greatest assurance of success? Learn the vital principles for a successful transition.

### **Managing Your Nonbillable Time to Produce Concrete Results**

For most firm members, planning how to use non-billable time to produce concrete results isn't a very high priority. As a result (and not surprisingly), we spend many of those hours doing things that produce little benefit for clients, for us individually, for our teams, or for the firm. How do you turn non-billable time into investment time? How do you use those hours most effectively to build

relationships, create new processes, train future leaders, and develop new business opportunities? Learn to use your investment time to build a better future.

### **Mergers and Acquisitions: Things You'd Better Know and Understand (January 2011)**

Recent years have seen unprecedented numbers of mergers and acquisitions within our profession. Unfortunately, our track record for success is nothing to brag about, with at least as many dismal failures as sparkling achievements. So what makes the difference? Why do some succeed while others crash and burn? Learn vital principles you must not violate and proven processes you can use to make your merger or acquisition the most productive and least disruptive for everyone involved.

### **Moving Away from the Book of Business Culture (December 2006)**

Amassing large books of business has long been the norm for our profession. But does this really serve our clients well? And how well does it serve the firm, with the approaching surge of partner retirements and increased risk of losing valued clients? Explore how a team approach and a change in attitude from “my client” to “the firm’s client” can make a huge difference for your firm.

### **Moving from Historian to Trusted Advisor (December 2013)**

So are you your clients’ most trusted advisor, regularly offering fresh ideas, proactively identifying needs, and consistently recommending innovative solutions (sometimes even before the problem is fully apparent)? Or are you dutifully—and no doubt very capably—documenting financial history? Learn what you need to do to switch from most trusted historian to most trusted advisor.

### **New Partner Training: What the Best Firms Are Doing (January 2007)**

The success of your new partners—not to mention the future of your firm—depends heavily on how well and how quickly your newest owners can make the transition from employee to partner. Unfortunately, that transition isn’t always smooth. What do new partners need to understand about being an owner? What skills do they need to develop to be successful as partners, and how are the best firms teaching those skills? How can the training new partners receive help them avoid the most common pitfalls and fully comprehend what is expected of them as owners? Learn what the best firms are doing for successful new partner training.

### **Ownership: The Privileges and Responsibilities of Being a Shareholder (October 2003)**

Achieving shareholder status is almost always the product of many years of continuous improvement, hard work, and dedication. For most, it’s also the realization of a long-held dream. But what does it really mean to be a shareholder? What do the firm’s leaders, your fellow shareholders, and other staff members have a right to expect from you as a firm owner? What should you expect of yourself? Explore what it means to be a shareholder—new, seasoned, or potential.

### **Partner Compensation: A Catalyst for Firm-Wide Change (October 2006)**

Understandably, few topics generate as much interest among accounting firm leaders as partner compensation. Change is on the horizon for many firms today, as ever-greater numbers of partners move toward retirement and firm profits continue to improve. Learn how partner compensation is changing and being used as a tool to encourage and reward partners for doing what's in the best interests of the firm.

### **Partner Evaluations: If Nothing Ever Changes: What's the Point? (December 2009)**

Periodically evaluating partner performance is commonplace in our profession; unfortunately, evaluation systems that actually produce meaningful change in partner performance are the exception rather than the rule. Do your partner evaluations really make a difference—or are they little more than a perfunctory annual exercise? Does your evaluation process help people play to their strengths? Does the connection between your evaluation system and partner compensation encourage change or promote the status quo? Learn specific things you can do to turn your partner evaluation process into a powerful force for change.

### **Partners: Beware of CAG! (July 2013)**

Complacency, arrogance, and greed (CAG) are the three greatest challenges facing successful firms today. How do you recognize them—and perhaps unwittingly encourage them—in your firm? What are the corrosive, negative impacts of letting complacency, arrogance, and greed take root and grow in your firm? Learn how you can make the necessary changes and what pitfalls you need to avoid.

### **Playing to Partner Strengths: Examples That Make Sense (November 2013)**

Nearly everyone understands the concept. And most firms have no difficulty applying it with partners whose strengths (or weaknesses) fall in the areas of business or staff development. It's how the concept works in other areas that stumps even some of the best firms. Hear practical examples of how to apply the “playing to strengths” concept and then include the results in your partner goal setting process.

### **Principles of Personal Development: Making the Most of Your Career (May 2009)**

Most of us learned long ago that “we are in charge of our own life”; unfortunately, we sometimes fail to fully apply that principle to our careers, as well as our personal lives. Do all professionals need a personal career strategy, or is that something only those who are newly graduated ought to have? Do you have your own carefully thought out, written, career strategy? Do you understand and know how to apply the key principles that will turn your strategy into action and positive results? Learn how to make the most of your career.

### **Proactive Steps to Ensure Partners Retire Successfully (September 2018)**

Rather than excitement, anticipation and a well-deserved feeling of accomplishment, many partners find only a pit in their stomachs as they approach retirement. After working diligently to build

expertise, reputation, client base and career, retiring partners can find it difficult let go of clients, compensation and identity as “partner.” So what can you do to ensure partners confidently transition clients, step into a different method of compensation and move gracefully into a new lifestyle? Let’s discuss ways to ensure a smooth, healthy transition that not only allows partners to enjoy retirement but also makes way for the next generation of leaders and ensures the continuity of the firm.

### **Profitable Growth: What High Performance Firms Are Doing (May 2013)**

Top line growth is good, but if it doesn’t improve profitability, what’s the point? Profitable growth doesn’t just happen; it requires careful planning, informed strategies, and smart decision-making. The best firms in our profession have figured it out. Learn what high performance firms are doing to consistently grow the bottom line.

### **Rating Your Clients A to D: Why and How (October and November 2013)**

It’s impossible to give your best—or worst—clients the service they should receive if you haven’t taken the time to first classify your clients and then decide what those ratings mean. In this presentation, we offer two proven processes for accurately rating all of your clients from A to D. Then, we present a strategy you can use to determine how these classifications should affect the service each client receives.

### **Re-inventing Your Client Services (August 2015)**

When you’re in the trenches, it can be difficult to see that the world of client service is changing. The accounting profession is facing decreasing client loyalty, increasing competition and a turnover in client leadership. Firms must adapt and evolve to thrive. Is your firm ready to embrace the new paradigm of client service? Or is your firm still doing things the way it’s always done them? Learn how to analyze your current client service offerings, evaluate potential new client needs and ensure your client service offerings are built for tomorrow’s challenging new marketplace.

### **Removing the Mystery from Your Path to Partner Program (September 2009)**

Those who are on the path—or who want to be—call out, “Show us the way.” Those who have already made the journey respond, “We’ll let you know when you get there.” And in the process, little is accomplished beyond adding to the frustration of both groups. But does it really have to be this way? Can—and should—current partners say more and do more to help illuminate the pathway for those who have their sights set on a chair at the owners’ table? Let us show you a true “win-win” solution for this frequently vexing dilemma.

### **Stop Conducting Perfunctory Performance Reviews (September 2007)**

Nearly every firm requires performance reviews, but the unfortunate reality is that most are done at a very mediocre level. What do you need to do to transform your firm’s existing evaluation program from a tiresome check box on a “To Do” list to a meaningful process that truly helps individuals make the most of their careers? What changes need to occur individually and firm-wide, and what is your

role as a leader in bringing about those changes? Learn what you can do to make the performance review process one of the most significant things that occurs in the life of each employee.

### **Stop Indulging the Soloists: Specific Ways to Create a One-Firm Culture (August 2016)**

Even the most talented musician can't play a Mozart symphony alone. Forward-thinking firms recognize that approaching issues with a one-firm attitude not only gives clients more services and expertise than one individual can provide, but also ensures greater staff utilization, retention and engagement. But how do you get the whole firm working as an orchestra rather than as talented soloists? How do you encourage each team member to consistently approach both firm and client issues with a larger vision, so everyone benefits from the collective expertise of all team members? Find specific, practical, and actionable ways to move from a collection of individuals to a unified team with a culture that encourages and rewards embracing a one-firm mentality.

### **Strategic Marketing: A Process That Makes a Difference (July 2009)**

In today's challenging economy, many firms are placing ever-greater emphasis on marketing firm services to existing and potential new clients. In so doing, they're discovering that the same old approaches that didn't work particularly well when times were good aren't working any better now. The solution? A proactive, strategic approach to marketing that helps you identify the clients you really want, learn how to get in front of them, and then out-prepare your competitors in winning the business you want. Forget the numbers game and strategy of hope and create a plan that makes a measurable difference.

### **Strategies for Improving Client Payments (January 2014)**

Every firm gives away some time (and the accompanying fees). That's as it should be. The important question, though, is, "Who's deciding what you're giving away—you or your clients?" This presentation will explain clear strategies and simple changes you can make that will improve client payments and your bottom line. Stop using the difficult economic times as a scapegoat for failing to collect appropriate fees and find answers to this ongoing challenge.

### **Strategies for Turning Busy Season into Opportunity Season (December 2003)**

Anyone who says that busy season isn't difficult is certainly a stranger to the truth—but if we will allow it to be, it can also be a time of tremendous opportunity. This presentation won't eliminate the long hours or the ibuprofen, but it will help you to see this time of year in an entirely new light and teach you how to recognize the opportunities that hide behind those busy months.



### **Succession Planning - The Vital Keys to Success (May 2004)**

Succession planning is one of the most important issues facing our profession today. Much more than just identifying the next managing partner, comprehensive succession planning includes retaining your best employees, ensuring that valued clients won't walk out the door with retiring partners, and preparing the next generation of firm leaders. The future of your firm may well depend on the quality of your succession plan.

### **Successfully Merging Different Cultures (May 2017)**

Culture is pervasive. It's the habits, attitudes, processes, expectations, and values that we often take for granted – at least until our culture clashes with another. Culture can be the piece of the puzzle that helps firm members feel like they “fit” at a firm, so what happens when two cultures combine? How do you avoid the miscommunication, frustrated expectations, and feelings of displacement that can lead to stalled growth, an “us versus them” mentality, and the departure of good people? Join us for the next Management Presentation and Sam will explore how to successfully merge two cultures in a way that maintains the best aspects of both and leads to a hybrid culture that's stronger, more robust, and yet still familiar.

### **Ten Keys to Creating Raving Fans (December 2004)**

Your firm certainly has its staunch supporters, those who need little prompting to speak well of you. But raving fans, clients who are so excited about what you do and how well you do it that they want to brag about you to anyone who will listen—well, for most of us that's a different story. What is it that transforms a loyal client into a raving fan (and keeps that client raving)? Explore ten keys to creating raving fans, along with other tips and ideas for turning happy clients into enthusiastic members of your unpaid sales force.

### **Ten Proven Ideas for Building Firm Culture (Jan /Feb 2005)**

Your firm culture is in many ways the glue that holds everything together. A vibrant, positive culture boosts morale, strengthens firm loyalty, and helps employees deal with the challenges that occur in any workplace. A strong culture is also a crucial element in the ongoing battle to retain your best employees and ensure a bright future for the firm. How strong is your culture? Do you know what to do to make it better tomorrow than it was yesterday? This presentation looks at ten great ways to build firm culture.

### **The Best 7 Things to Do to Reduce Underperformance (December 2012)**

Few things are more frustrating to firm leaders than the underperformance that exists in most firms at nearly every level. Just what is underperformance and what are the ways—both seen and unseen—that it hurts the firm? How do you prevent underperformance? How do you responsibly and fairly deal with it? Learn concrete, proven methods for addressing this challenging problem.

### **The Best Approach to Firm Strategic Planning (October 2016)**

Unless you drive for NASCAR, going faster doesn't help without a destination and plan to reach your goals. If you're driving a firm (rather than a Formula 1), you'll need to create a strategic plan that clearly defines your direction and the steps you'll take to achieve your objectives. Learn how to create an effective strategic plan, including specific steps to establish strong pillars, pick great committees, properly prepare partners, allocate the right resources and ensure you have the traction necessary to succeed.

### **The Best Strategy for Maximizing Key Leadership Positions (February 2016)**

You know you need the right people driving your firm. But putting the right people in the right leadership seats is just the first step. Once you give your firm leaders a position, do you also give them keys and a good map? Sam discusses how to ensure those in key positions are properly prepared and set up for success. He explains how to maximize their impact by ensuring they're working on the right initiatives, aren't getting bogged down in administrative work, and have the resources, support and authority to stay on the road to success. He also provides insights on how to set term limits and how to ensure a smooth transition when a leadership course change is necessary.

### **The Best Way to Develop Future Rainmakers (September 2013)**

With most of the profession's best business developers—not to mention client contacts and referral sources—retiring in the next 10 years, nearly every firm knows it needs to be preparing its future rainmakers. Unfortunately, many firms have tried but few have succeeded in creating effective rainmaker training programs. What does a real rainmaker training program look like, one that replaces top producers with new business developers who can deliver the same top line growth? How do you identify your future rainmakers early in their careers and get them started down the right path? Let us help you develop a plan.

### **The Biggest Barriers in Launching and Growing Niches (August 2014)**

With much of firm growth now coming from non-traditional services, niches are a huge issue for many firms. Most firm leaders know what the challenges are to successfully launching and growing niche services, but few understand how to get past those barriers and experience real success. Learn proven principles, best practices, and hints and tips from the best firms that will help you successfully launch and grow your niches.

### **The Case for Part-Time Partners (August 2017)**

For a variety of reasons, many of the talented, ambitious and driven emerging leaders in accounting firms are unwilling to commit to the number of hours that firm partners have historically met. Does this mean they are banned from ever reaching partner status? Think again. If your firm is unwilling to promote a part-time person to partner, they may very well find that's not the case somewhere else. Don't lose your top talent by attempting to force them into the Baby Boomer mold. Join Sam for a

discussion of the pros and cons of part-time partnership. He'll talk about pitfalls to avoid, safeguards to include and ways to make this offer a true win/win for both the new partner and the firm.

### **The Five Highest Uses of Your Time as Managing Partner (Jan 2013)**

As managing partner, you're pulled in a hundred different directions. Trying to respond to client concerns, staff and partner issues, business development opportunities, governance challenges and a myriad of other responsibilities can easily sap your energy and erode your effectiveness. What should you focus on? What do you need to do to have the greatest impact on the firm, both in the short run and long term? How do you successfully move the dial with so many people and needs competing for your attention? Get some answers.

### **The Partner Sabbatical: A True Win/Win/Win (May 2006)**

Often viewed solely as a means of extending the useful life of owners, partner sabbaticals can actually accomplish much more. Forcing a team approach, sabbaticals make the transition at partner retirement much easier for the client, as well as the rest of the firm. In addition, they give other firm employees the chance to step up to new responsibilities and opportunities for growth. So how do you structure a sabbatical program to achieve these ends? Learn a practical approach to forming a program that produces a win for the team, the partner and the client.

### **The Proper Way to Evaluate Firm Culture (October 2012)**

Firm culture is vitally important to every firm in our profession. How do you evaluate your firm's culture? More importantly, how do you change it and improve it once you understand it? How do you evaluate another firm's culture as you consider a potential merger or acquisition? These are just a few of the far-reaching questions we'll answer in this important presentation.

### **The Ten Worst Habits of Otherwise Good Leaders (June 2012)**

What are the most common things otherwise good leaders repeatedly do that hold them back from reaching new heights and fulfilling their potential? What is the true impact of our bad habits on our careers, on those who look to us for leadership, and on the firm? What makes those bad habits so harmful, and what do we need to do to change and overcome them?

### **The Top Messages Your Partners Must Hear (July 2018)**

Partners should be the driving force in a firm's success, yet frequently firms underutilize this valuable resource because they don't provide the guidance needed to tap into the power of the group. So, what aren't you telling your partner group? What difficult issues could be tackled, if the partners were on board? What should partners be doing that they aren't? Don't continue to hold the firm back by encouraging partners to stay on old, ineffective and unambitious paths, when they could (and should) be doing so much more. Join us as we discuss the top messages your partners need to hear.

### **Training for the Future: The Best Way to Rapidly Develop Your People (September 2016)**

Our profession is changing at a dizzying pace. Clients want new services. Staff and clients want new tech. And your young leaders want training that doesn't just provide technical expertise but also motivates, develops, and prepares them for future leadership roles. So what are you doing today to fast track skills development and ensure your firm is prepared to meet tomorrow's needs? Are you in a proactive mode, anticipating needs and moving forward confidently, or are you just reacting to the heat of the flames licking at the door? Learn how to make rapid skill development work at your firm.

### **Transition Planning for Retiring Partners (January 2006)**

Hundreds of partners will leave the profession in the coming years as the Baby Boom generation heads into retirement. What do you need to do to make the last few years of a partner's career a great experience for everyone? What steps must be taken to ensure the successful transition of a retiring partner's clients and responsibilities? What are the five key documents that must be in place as a partner leaves the firm? Let us help remove the mystery from partner retirement policies and processes.

### **Transitioning Clients at Partner Retirement: Getting It Right (April 2008)**

The increase in partner retirements most firms will experience in the coming years—not to mention the number of clients who will also be retiring—has the potential to put many long-established client relationships at risk. Do you know what to do to make sure these valued relationships aren't lost as partners retire? Learn how taking a "leave nothing to chance" approach to transitioning clients can turn a worrisome situation into a great opportunity.

### **What Are the Biggest Paradigms Holding Firms Back? (May 2018)**

As an old Ethiopian proverb states: fish discover water last. It can be hard to see what's holding you back when you're in the midst of day-to-day decisions. Your culture, your history, your processes and even your own assumptions about how the future of business will unfold may be keeping you from making the changes your firm needs to thrive. Join Sam as he takes a look at the top paradigms that might be influencing your decisions and inadvertently stunting your firm's growth, killing morale, creating issues for your next generation of leaders, and sending your firm toward an uncertain future.

### **What Every Firm Needs to Know About Proactively Preparing for Busy Season (November 2009)**

Easily the most hectic and demanding time of year for nearly every firm in our profession, busy season is also a time of unparalleled opportunities. When else do we interact face-to-face with virtually every client? How can we capitalize on the opportunities and feel comfortable doing so, especially during a time of economic contraction? What do you personally need to do to be fully prepared for tax season? What message does the firm need to send to the family members of those who are most impacted by busy season? Let us help you tackle this issue.

### **What It Means to Be a High Performing Partner (April 2009)**

With today's economic uncertainties and the fast approaching retirement of many firm leaders, the need for every partner to be a high performing partner has never been greater. What does it mean to be a high performing partner? Is it realistic for firms to expect every owner to be a high performer, or is that just wishful thinking? What are the key characteristics exhibited by high performers, and what do you need to do to become or remain one?

### **What Should You Be Doing with Your B and C Clients (October 2015)**

Most of us recognize that it's vitally important to give your A-level clients A-level service. Most of us also grudgingly admit that we should fire our D-level clients. But what do you do with mid-level clients? They provide a steady stream of work and aren't a drain on firm resources (unlike some D-Level clients we could mention). Rather than continuing to give them mid-level service for mid-level work, is there a way to get them to the next level? And if they won't ever become A-level, can they still play a vital role? Let us share best practices for dealing with B and C clients, ways to bring some to the next level and the people, resources and time needed to maximize these mid-level clients.

### **What to Do When Partners Can't Seem to Get Along (July/Aug 2011)**

Disagreements, misunderstandings, and frustrations are normal in our busy professional (and personal) lives. Left unresolved, however, such problems can easily destroy the unity of the partner group and hold the entire firm back. There are seldom any easy answers when partners don't get along, but there are timeless principles and proven processes that can be applied to produce positive results. Find answers in this insightful and thought-provoking presentation.

### **What to Do When Payroll Rates Rise Faster Than Billing Rates (September 2015)**

We may be one of the "nicest" professions on the planet, but that doesn't mean we need to give away our services. Too often though firms allow individuals to charge the same billable rate year after year. As payroll rises and billable rates remain flat, the firm's bottom line suffers. There are specific things you can do to curb this negative trend in today's firms. Learn how the best firms are leveraging staff, changing billing practices, and improving efficiencies so billable rates rise naturally and the firm maintains (and improves) profitability.

### **What's the Best Use of Partner Time? (April /May 2012)**

Where should your firm's partners be spending their time? What five areas should they focus on that will provide the greatest value to the firm, both now and in the future? What are the worst uses of partner time and how do you avoid those dead ends? How should partner goals tie to where partner hours are being spent? Explore these challenging questions in this insightful and timely presentation.

### **Why Firms Are Re-thinking Their Recruiting Strategy (April/May 2013)**

Even though some recruiting strategies are still working, high performance firms are asking—and answering—tough questions. Here are a few. Departures at the first, second and third-year levels are

on the up-tick again; can you recruit for firm loyalty? Recruiting 3.8-4.0 GPA graduates has traditionally been the norm; is it time for a change? Thirty-minute interviews haven't been great predictors of job success; how do you successfully narrow the funnel before an offer is extended? Find out how high performance firms are answering these questions.

### **World Class Training: Getting Your Firm on Track (Feb/Mar 2007)**

Training. Every firm does it, but most acknowledge they don't do it very well, especially when it comes to leadership and other non-technical skills. So how do you transform a mediocre program into something that helps attract and retain top talent, builds careers, and gives your firm a significant competitive advantage? What fundamental changes must occur to take your training program from compliance to opportunity driven? How do you set and implement appropriate standards, provide instruction in digestible doses, and significantly raise the quality of training throughout your firm? Learn the answers to these and other important questions that will put your firm on track to deliver world class training.

### **Written Standards: Getting Beyond the Talk in Improving Performance (April 2010)**

Like the weather, poor performance seems always to be a topic of conversation. However, unlike searing summer heat or numbing winter cold, poor performance is a problem you can actually do something about. Does your firm have written performance standards? Do they exist at all levels within the firm? Do firm leaders know how to establish and maintain the standards and effectively use them to help people get back on track?