

From Staff To Partner Summit – Session Descriptions

Day 1 – August 12, 2010

12:00pm – Keynote: “Beyond Numbers and Hours: Developing a Successful Professional Practice” with *Dr. Cheryl Leitschuh, Ed.D., RCC* from Leitschuh Leadership Consulting

You have a hard enough time completing your mountains of client work on deadline, dealing with billable hours’ demands and increasing productivity. So, how can you possibly fit in effective practice development? The good news: It can be done. And you can reap the rewards of a thriving practice. This executive briefing will focus on you — because you are the main force behind whether your practice succeeds or fails. It is your natural talent, personal style, interests and values that drive your practice forward. When you effectively harness these natural abilities, you can build an energetic internal team and create a successful business development model.

Objectives for this executive briefing:

- Define your role, as well as the role of your associates, in developing your practice.
- Discuss the criteria needed to develop a winning practice and successful firm.
- Develop a plan of action for your practice.
- Learn work-life balancing skills.
- Obtain resources that you can use each day to develop a powerful practice.

1:30pm – “Attract and Convert Your Prospects to Clients Through Referrals” with *Joanne S. Black* from “No More Cold Calling”

How would you like to consistently attract your best and most profitable clients while turning every new client into a source of even more business? Joanne Black’s presentation presents the common-sense approach to referrals that leaves people wishing that they had started down this road years ago.

Tap into Joanne’s proven, No More Cold Calling® Referral-Selling System, boost your engagements, your practice, and your profits. Leverage the power of your referral network and attract new clients without ever making a cold call.

- Learn why referrals are common sense, but not common practice
- Convert more than 50 percent of your prospects to clients
- Use referrals to impact your bottom line
- Double your sales footprint without adding to your budget
- Learn the 5 steps to build your referral business

3:00pm – “Mentoring...a Key to Success and Growth” with *Judith R. Trepeck, CPA*

Mentoring is an easy word to banter around but one seldom understood by mentors and "mentees" alike. There are certain characteristics that will make the mentoring process successful for everyone involved and ensure the enrichment of the process. Everyone's role is critical so here you will learn:

- >What's in it for YOU!
- >Who is a good mentor for YOU!
- >Agreement between mentor and mentee
- >Paying it forward
- >Continual review process

From Staff To Partner Summit – Session Descriptions

Day 2 – August 19, 2010

12:00pm – “Embracing Balance in an Unbalanced Profession” with *Michelle Stimpson* from LifeShine®

In her years of research with clients—and throughout her own personal journey—Michelle Stimpson has found that minimizing stress, prioritizing what’s most important, and feeling a sense of balance and fulfillment all boil down to one simple idea: The power and importance of following the things in life that make you come alive and bring you joy.

And the more you follow and embrace your joy, the more life opens up and you are richly rewarded with amazing life experiences.

In order to make space for more joyful experiences, Michelle will walk you through Stephen Covey’s Time Matrix to help you identify: 1) How you currently spend your time, and 2) How you want to be spending your time...ultimately helping you close the gap and between where you are right now and where you want to be.

Michelle will engage you and encourage you to tap into the things that bring you joy; and you’ll leave with a commitment to ‘one thing’ that you will do differently...in order to bring more aliveness, richness, and balance into your life.

Leave the session with:

- An awareness of where your time is currently spent
- A clear vision of how you want to be spending your time
- Tips to close the gap and spend your time more effectively
- A reflection on the things that bring you joy
- A commitment to doing ‘one thing’ differently to embrace more joy in your life

1:30pm – “How to Collaborate and Influence Successfully In These Turbulent Times” with *Kyle MacKenzie Nowell* of KMA Associates

The brain is a social animal.....and this means that social issues matter to the brain. A lot. Studies are showing that the brain interacts with social needs using the same networks as it uses for basic survival....survival?...yes, survival. So, our social interactions - collaboration and influence among them - are a matter of survival to our brain. What does this have to do with my success in a CPA firm? Everything. Come explore what neuroscience is teaching us about the social nature of our brains...and how it is changing everything we've understood about how to successfully communicate with, collaborate with and influence other people!

In this engaging and thought provoking session, you will:

- * Discover how to help yourself and those around you understand how the current financial crisis may be triggering instinctive and counterproductive reactions
- * Learn how these instinctive reactions can dramatically reduce personal and work effectiveness
- * Use what we have discovered from neuroscience to counteract the impact of change and uncertainty on engagement and productivity
- * Increase your own effectiveness at work by applying some of the latest findings from neuroscience in everyday workplace scenarios

From Staff To Partner Summit – Session Descriptions

* Take away the innovative and practical SCARF model that can be used to enhance collaboration and influence during these turbulent times

3:00pm – “Women in Leadership: Negotiating Your Way to the Top” with *Julie Moore Rapacki* of Polish Your Star

The challenge for many female staff and middle managers is figuring out how to fully use their strengths so they can go to the next level. In this session we will explore the unique strengths women bring to leadership and share best practices tailored specifically for women leaders. Key learnings: 1) Women’s Leadership Today – Perception/Reality; 2.) Defining Leadership; 3.) Gender Differences; 4.) 7 Ways to Negotiate Your Way to the Top; and 5.) Tips to Tap the Potential of Other Women Leaders.

Day 3 – August 26, 2010

12:00pm – “Navigating the Journey: Sharing the Secrets of Successful Women Leaders in the Accounting Profession” with *Mary L. Bennett* of MLBennett Consulting.

There are many unwritten rules, hills and valleys to navigate in pursuing a successful career in the accounting profession. Some hurdles are invisible to as we make our way to the next curve in the road. Navigation is often more challenging for women because the profession is still primarily male in it’s leadership and partner ranks. The lack of access to influential leaders and female role models is a tangible disadvantage that is often underestimated. In addition, successful work/life integration models exist but are not widely known or shared. This session will take the participants deep into the proven success strategies shared by women leaders in the profession.

Participants will take away the following deliverables from this session:

- Attributes women leaders have in common
- Strategies to access navigational information about your organization
- Information on why successful women sometimes do not help other women and what we can do about it
- Understanding career advocacy, why it is essential and how to access it
- Why the work we do is only one aspect of our career success equation
- Information on why flexibility is not a women's issue and only one aspect of women's lack of advancement in our profession
- Why the advancement of women in our profession is an organizational and industry sustainability issue

From Staff To Partner Summit – Session Descriptions

1:30pm – “New Leader Workshop: How Did I Get Here and What Do I Do Now?” with *Mary F. Cheaney, CPA*

This presentation will appeal to the new leader. It explores how you got to be in charge and how to move forward from this point. Some leaders have the innate skill and confidence to embrace this role. However for some, being a leader is not voluntary, but rather a necessary step in getting ahead. And as such, it is not always instinctive or comfortable. This session is designed for those who want to learn to be effective leaders.

The workshop will

- * introduce the new leader to some fundamental concepts of leadership,
- * discuss basic skills necessary to being a good leader,
- * offer steps you can take to build or improve the necessary skills,
- * define different management styles and outline the criteria for when to use them,
- * suggest techniques to manage effectively using each style.

Whether you are new to your position or your organization, these objectives will help you to navigate your future confidently.

3:00pm – Keynote: “10 Organizational and Personal Strategies for Success” with *Leslie A. Murphy, CPA* of Murphy Consulting, Inc.

Who says “we can’t have it all” with a challenging, successful career and a satisfied, joyous personal life? Throughout her nearly 35 year career at Plante & Moran, Leslie learned countless lessons and developed strategies that helped her to succeed. She has also counseled countless women and men within the profession to help them be successful. Now you can benefit from that experience first-hand, as Leslie describes the 10 most important things to achieve success within your organization and within your personal life.

For additional information or to register, visit

<http://FromStaffToPartnerSummit.com>