



Upstream Academy's Premier Event  
for Firm Leadership Teams



October 27-28, 2011 • Chicago, Illinois

# BEST PRACTICES 2011

ENVISIONING THE FIRM OF THE FUTURE

## What will the firm of the future look like?

No one has all the answers, but this much is certain: tomorrow's successful firms will only vaguely resemble today's.

So why are we still doing things the same old way?

The baby boomers are leaving in droves. Our employee rosters include ever-greater numbers of women.

The pace of technological change is dizzying.

And we're still doing things the way we've always done them.

Join us in Chicago October 27-28.

Get ready for the future.





## **The Conference**

In today's world, there are frequently only two choices: embrace change or flounder in the wake of those who do.

How do you embrace something that feels so daunting? Where will the greatest changes occur in your firm? How can you ensure you're riding the top of the wave and not getting trapped at the bottom?

Here are some of the topics for this year's conference sessions:

- What do you need to do to effectively manage change and the challenges that inevitably accompany it?
- How do you need to adjust your thinking to better grow the firm?
- What does cloud computing mean for you and your clients?
- How do you put your firm's best minds to work thinking about the future?
- How should you re-structure your firm to reflect today's realities?
- What can you expect from social media and how can you use it most effectively?

## **The Location**

Chicago's magic lies in its mix: sophisticated yet friendly, bustling city streets adjacent to long stretches of green parks and sparkling blue Lake Michigan, and a stunning year-round array of things to see and do, unique in all the world. Chicago is more walkable than most large cities, and the Sax Hotel is located in the heart of downtown in close proximity to world renowned shopping, the Chicago Theater District, museums, and restaurants.

With an endless assortment of theatre, music, dance, restaurants, shopping and nightlife at your fingertips and able to match every taste, budget and mood, come and discover why so many visitors fall in love with this city every year.

# CONFERENCE AGENDA

## Thursday, October 27, 2011

- 7:00 – 8:00 am Breakfast
- 8:00 – 8:15 am **Welcome**  
**Sam M. Allred, Founder and Director of Upstream Academy**
- 8:15 – 9:30 am **Change: Manage It Well (Or Be Managed By It)**  
**Sam M. Allred, Founder and Director of Upstream Academy**  
Make no mistake: managing change is hard work under even the best conditions. How do you keep the dialogue open with those who are being impacted most by change? How do you work through the inevitable challenges change brings, keep partners and others performing, maintain your firm culture, and pace both yourself and the firm? Don't miss this keynote session with one of our profession's top thought leaders!
- 9:30 – 9:45 am Break
- 9:45 – 11:00 am **Old Guard Traditions, New Guard Growth**  
**Gale Crosley, President of Crosley+Company**  
Time-honored approaches to growth have served us well for many years, but times are changing. So what are the alternatives to banker breakfasts, lawyer lunches and aggressively waiting for something to happen? Join us for this session where we'll discuss the required adjustments in mindset and explore specialization, innovation, value and competitive pricing, social media, and other elements of cutting-edge growth.
- 11:00 – 11:15 am Break
- 11:15 – 12:30 pm **Clouds on the Horizon: The Future of Computing and Connecting**  
**Roman Kepczyk, Director of Consulting for Xcentric**  
What does the future hold for your internal systems? More importantly, what does cloud computing (and other technological innovations that will inevitably follow) mean for you and your clients in terms of accessibility to data, communication, and the services we provide? These are just some of the intriguing questions we'll address in this important session. Join us!
- 12:30 – 1:30 pm Lunch
- 1:30 – 2:45 pm Concurrent Sessions – Select One of Three Sessions
- 1:30 – 2:45 pm **Firm Structure: Yes, It's Broken and Yes, You Need to Fix It**  
**Timothy J. Bartz, Chairman of Anderson ZurMuehlen & Co., P.C.**  
It's 2011 and many firms still look and operate like it's 1980. To prosper, the firm of the future will require a new structure. How can you build a more collaborative structure that will better meet the needs of firm leaders, staff members, and clients? Join us for this session as we explore answers to these important questions.
- 1:30 – 2:45 pm **Sorting It Out: Putting Your Best Minds to Work**  
**Jody Padar, CEO and Principal at New Vision CPA Group**  
Getting your people involved and proactively thinking about the future is critical to the firm's success. It's also a great way to find out what your next generation of leaders is thinking, talking about, and wanting. In this session, we'll explore tools to engage all generations in dealing with the changing landscape of modern business. Don't miss this session!
- 1:30 – 2:45 pm **Social Media: Now Is the Time, Your Firm Is the Place**  
**Eric Majchrzak, Marketing Director at Freed Maxick & Battaglia, CPAs**  
Are you tired of all the buzz about social media? Frustrated that no one has been able to articulate its value to your firm? This session will provide real-life examples of how social media can help generate leads, enhance relationships, improve recruiting, gain media exposure, build credibility, maximize charge hours, and boost your firm's visibility on search engines. Don't miss this session!

# CONFERENCE AGENDA

2:45 – 5:15 pm **Discussion Forums: Shared Challenges, Shared Solutions**  
**Sam M. Allred, Timothy J. Bartz, Jack Hinsche, K. Tim Larsen and Jody Padar**  
Always one of the most popular features of Upstream conferences, our afternoon discussion forums provide an unmatched opportunity to share your firm's greatest challenges and learn how other firm leaders have successfully dealt with the same difficulties. Bring your most vexing issues and a notepad, and be ready to return to the office with great new ideas for solving your firm's challenges!

5:15 – 6:15 pm Reception

## Friday, October 28, 2011

7:00 – 8:00 am Continental Breakfast

8:00 – 9:45 am **Discussion Sessions**  
**Sam M. Allred & Timothy J. Bartz**  
On the second day of the conference, join us for a new learning experience. Sam and Tim will use brief presentations and a case study format to help conference participants delve more deeply into the issues all firms will face in the coming years as we move into a new era in our profession. Topics to be discussed include the following:

- How to move to an environment where women play a more significant role in firm leadership
- How to measure and compensate individual contributions to firm success
- Engaging your clients in change and becoming a more client-centric firm
- Key strategies for adapting to change
- Dealing with the compression of busy season
- Responding to future leaders who want fewer hours for the same (or increased) compensation

9:45 – 10:15 am Break

10:15 – 11:45 am **Discussion Sessions Continued**  
**Sam M. Allred & Timothy J. Bartz**

11:45 – 12:00 pm **Closing Remarks**  
**Timothy J. Bartz, Chairman of Anderson ZurMuehlen & Co., P.C.**  
Come to this final session, where we'll recap the conference highlights and offer some tips on how to implement the great ideas you've heard at BestPractices 2011.



# CONFERENCE SPEAKERS

Comprised of some of the nation's top thinkers in the profession, our roster of conference presenters will confidently and knowledgeably address many of the most challenging issues facing firms today.



**Sam M. Allred**  
Founder and Director  
of Upstream Academy



**Gale Crosley**  
President of  
Crosley+Company



**Timothy J. Bartz**  
Chairman of  
Anderson ZurMuehlen & Co.



**Roman Kepczyk**  
Director of Consulting for  
Xcentric



**Jody Padar**  
CEO and Principal at  
New Vision CPA Group



**Eric Majchrzak**  
Marketing Director at  
Freed Maxick & Battaglia, CPAs



**Jack Hinsche**  
Managing Partner Emeritus  
of Windes & McClaughry



**K. Tim Larsen**  
Managing Partner of  
Squire & Company, PC

## CONTINUING PROFESSIONAL EDUCATION



Upstream Academy will recommend 13 hours of CPE credit for participation in this course.  
Prerequisite: None Skill Level: Overview Learning Objectives: After attending the BestPractices Conference, you will be able to identify your firm's best people and create processes to attract and retain quality employees..

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

# CONFERENCE LOGISTICS



## Hotel Reservations

Call the Sax Hotel at 877-569-3742. Specify the BestPractices Conference to receive the special conference rate of \$189 per night. We recommend making your reservations by September 23, 2011.

## Travel

The hotel is approximately 12 miles from Midway International Airport and approximately 19 miles from O'Hare International Airport. Call Go Airport Express at 888-284-3826 and reference group discount code Upstream to receive the rate of \$41 roundtrip from O'Hare or \$34 roundtrip from Midway.

## To Register

Mail or fax the registration form to: Upstream Academy – BestPractices 2011 • P.O. Box 1147, Helena, MT 59624-1147 • Phone 406-495-1850 • Fax 406-442-1100

## Cancellation Policy

Registrants will be refunded their registration less a \$100 cancellation charge if they notify Upstream after September 23, 2011.

## Registration (please use a separate form for each attendee)

You can also register on-line at [www.upstreamacademy/bestpractices.asp](http://www.upstreamacademy/bestpractices.asp).

Attendee \_\_\_\_\_

Preferred Name \_\_\_\_\_

Firm \_\_\_\_\_

Title/Position \_\_\_\_\_

Email \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Total Firm Gross Revenue (for discussion forum assignment) \_\_\_\_\_

Spouse's Name (if spouse will accompany you) \_\_\_\_\_

## Conference Payment

- |   |        |
|---|--------|
| <input type="checkbox"/> 1st Participant from Upstream Academy Network (UAN) Member Firm        | \$ 895 |
| <input type="checkbox"/> Additional Participant from Upstream Academy Network (UAN) Member Firm | \$ 795 |
| <input type="checkbox"/> 1st Participant from Non-UAN Member Firm                               | \$1195 |
| <input type="checkbox"/> Additional Participant from Non-UAN Member Firm                        | \$ 995 |

Check Enclosed\*    Visa    Mastercard

Card No. \_\_\_\_\_ Exp. Date \_\_\_\_\_

Name of Cardholder \_\_\_\_\_

Signature \_\_\_\_\_

\*Please make checks payable to Upstream Academy. Canadian and overseas:  
use checks payable through a U.S. bank, or international money order.

