



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. The Management Presentation CD contains a one-hour PowerPoint with embedded audio discussion of the topic presented 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.

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. Join us for this presentation and learn how improved communication skills can make a difference in your firm and what you can do to make improvement a reality.

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? Join us for this presentation and learn what you need to do to become the employer everyone else talks about.

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? This presentation teaches the important principles and key steps you need to follow to build a culture of discipline in your firm.

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? This presentation takes a look at this key firm issue.

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? Come join us for this presentation and learn the answers to these and other vital questions about 360° performance evaluation systems.

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 joining us for 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 & 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 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? Join us for this important presentation and learn what you can do to help your underperformers reach their full potential.

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. Join us to learn how to keep your team members—and yourself—off the ledge.

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? Please join us to 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.

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

In most firms, partners comprise the single most underutilized group. How can this be so? 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? Join us for this important presentation and find out how it’s done.

Getting Serious About Niches (September 2006)

Most niche services have enormous potential to be profitable ventures, and yet many fail. Knowing the answers to the following questions could prevent a lot of these failures:

- 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? Join us for this important presentation!

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? Join us for this vital presentation.

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? Join us for 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? Join us for this important presentation, designed especially for managing partners.

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? Don't miss this presentation!

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. This presentation discusses the symptoms of poor communication, key principles of effective communication, and steps you can follow to improve communication within your firm.

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? Join us for this presentation and find out the answers to these and other important questions!

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? Be sure to join us for this important presentation and learn how to transform your current coaching program into the powerful tool you've always known it could be.

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? Join us for this vital presentation and 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? This presentation will 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? What best practices should you follow in firm governance, and how do you make the transition from one system to another? Don't miss this presentation!

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? This presentation explores how a team approach and a change in attitude from "my client" to "the firm's client" can make a huge difference.

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? This presentation answers these and other important questions regarding 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? These as well as other topics are explored in this presentation for all shareholders—new, seasoned, and 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. This presentation discusses 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? Join us for this presentation and learn specific things you can do to turn your partner evaluation process into a powerful force for change.

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?

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? Join us for this important presentation and learn a true “win-win” solution for this frequently vexing dilemma.

Sharpening Your Focus: The Top Five Issues for 2008 (January 2008)

The coming year promises to be a time of change, exciting opportunities, and new challenges for our profession. As always, the demands on firm leaders' time and energy will exceed the available supply. What are the issues you really need to focus on in 2008, the things that will make an important difference in your firm? What are the key questions and possibilities that need—and deserve—firm leaders' careful attention as the new year begins? Join us for this presentation and learn the answers to these and other important questions that will change how you look at 2008.

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? Join us for this important presentation and 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.

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.

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.

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)? This presentation explores 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 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? This presentation will give you a practical approach to forming a program that produces a win for the team, the partner and the client.

The Ten Worst Habits of Leaders (October 2008)

It was Mark Twain who once observed, “Nothing so needs reforming as other people’s habits.” Fortunately, most firm leaders recognize that real personal and professional progress comes from “reforming” our own bad habits, not from dwelling on the shortcomings of others. What are the worst habits of firm leaders? How do those bad habits keep leaders from achieving their full potential and how do they hold the firm back? Don’t miss this important presentation!

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? This presentation will 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? Join us for this important presentation and learn how taking a “leave nothing to chance” approach to transitioning clients can turn a worrisome situation into a great opportunity.

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? Don't miss this important presentation!

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?

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? Join us for this presentation and 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? Join us for this important and timely presentation.

