



Upstream Academy's Premier Event  
for Firm Leadership Teams



October 28-29, 2010 • San Antonio, Texas

# BEST PRACTICES 2010

MAXIMIZING TEAM  
HORSEPOWER

## MAXIMIZING TEAM HORSEPOWER

Getting the most out of each person at every level of the firm.

A powerful principle – but how do you do it?

It won't happen as long as people do what they've always done,  
things that long ago stopped stretching them,  
and which they happen to be very good at.

Growth – individual or firm – seldom occurs where we're comfortable.

Join us in San Antonio October 28-29.

Learn how to maximize your team's horsepower.





## CONFERENCE SPEAKERS

Comprised of some of today's most innovative thinkers and skilled speakers, our roster of presenters and discussion forum facilitators for this year's conference is impressive. Each of these individuals brings a unique blend of creative thought, broad experience, and proven success in developing both teams and individuals and in maximizing team horsepower.



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



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



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



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



**Krista McMasters**  
Chief Executive Officer of  
Clifton Gunderson LLP



**Mark Tanenbaum**  
Partner at  
The Value Creation Group



**Bob Twerdun**  
Vice President for  
Human Capital of MNP LLP



**Jennifer Wilson**  
Partner and Co-founder of  
Convergence Coaching, LLC

### The Conference

Maximizing team horsepower.

For most firm leaders, embracing the principle is a no-brainer. And many have already tried to apply it, only to experience pushback, frustration, and limited success.

What stands in the way of firm leaders getting the most out of everyone, especially their most talented and experienced people?

Bad habits. Outmoded traditions. Unquestioned assumptions. Poor understanding of important principles.

So how can BestPractices 2010 help? Here are some of the topics our outstanding presenters will cover:

- Successfully engaging your top performers and keeping them moving
- Identifying and enforcing your firm's "non-negotiables"
- The very best things you can do to develop your leaders
- Avoiding the fatal errors in delegation
- Setting and achieving great – not just good – partner goals
- Maximizing horsepower with a compelling vision and clear strategy
- Managing – not avoiding or ignoring – team conflict
- Understanding motives – both your own and others'
- Holding the crucial conversations that will help everyone succeed

### The Location

With a strong sense of history and tradition, San Antonio captures the spirit of Texas while carefully blending in cosmopolitan progress. Now the eighth largest city in the United States, San Antonio has long been a crossroads for travelers and cultures. Nearly twenty million visitors a year enjoy its charms.

The crown jewel of San Antonio's many attractions is the River Walk, cobblestone and flagstone paths that border both sides of the San Antonio River as it winds its way through the middle of the business district and past the conference hotel. From The Alamo to Market Square and from Sea World and Six Flags to the Museum of Art, San Antonio has something for everyone!

## CONTINUING PROFESSIONAL EDUCATION



Upstream Academy will recommend 13 hours of CPE credit for participation in this conference. Prerequisite: None. Advance Preparation: None. Skill Level: Overview. Instructional Method: Group Live. 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 AGENDA

## Thursday, October 28, 2010

- 7:00 – 8:00 am Breakfast
- 8:00 – 9:15 am **Developing Leaders: The Best Three Things You Can Do**  
**Sam M. Allred, Founder and Director of Upstream Academy**  
Leadership development is a huge issue in our profession today. Unfortunately, many firms are still counting on trial and error and the strategy of hope to produce future leaders. What are the three best things you can do to ensure your firm has the leaders it needs, when it needs them? What can you do to hold people accountable for leadership development and measure progress? Don't miss this session!
- 9:15 – 9:30 am Break
- 9:30 – 10:45 am **Firm Vision and Team Horsepower**  
**Krista McMasters, Chief Executive Officer of Clifton Gunderson LLP**  
Maximizing your team's horsepower – pushing work to the lowest level, giving people challenging assignments, not assuming everybody can (or should) be good at everything, not treating everyone the same, etc. – isn't exactly rocket science. But if you fail to first engage and unite your team with a compelling vision and clear strategy, putting a rocket in space will seem simple by comparison. Join us for this important session!
- 10:45 – 11:00 am Break
- 11:00 – 12:15 pm **Things You Can't Opt Out Of: Setting the Non-Negotiables**  
**Timothy J. Bartz, Chairman of the Board of Anderson ZurMuehlen & Co.**  
What are the non-negotiables in your firm, the minimum standards below which no one may fall without serious consequences? How do you set and then enforce such standards and values? What are some things you should consider for your non-negotiables? Come to this session and learn one more key to maximizing your horsepower and becoming a high performance firm.
- 12:15 – 1:30 pm Lunch
- 1:30 – 5:00 pm **Brainstorming Creative New Solutions**  
**Sam Allred, Tim Bartz, Jack Hinsche, and Tim Larsen**  
Nobody ever said you have to supply all of the answers and solve all of the people problems yourself, but it no doubt feels that way at times. A perennial favorite of Upstream conference-goers, our afternoon breakout sessions will give you a chance to pick the brains of other firm leaders from around the country and learn how they've solved the very problems that are keeping you awake at night. Bring your questions and problems and be ready for some great new ideas!
- 5:00 – 6:15 pm Reception

## Friday, October 29, 2010

- 7:00 – 8:00 am Continental Breakfast
- Concurrent Sessions – Select One of Four Sessions
- 8:00 – 9:15 am **Conflict: Effectively Managing Both Sides of the Equation**  
**Mark Tanenbaum, Partner at The Value Creation Group**  
In awe of those who just seem to have a knack for managing conflict? Understanding the variables in the conflict equation is a key first step for leaders as they deal with the disagreements and struggles that are inevitable in any healthy organization. Join us for this fast-paced, interactive session and learn how you can resolve conflicts respectfully and reinforce a positive work climate in your firm.
- 8:00 – 9:15 am **Engaging Your High Performers and Keeping Them Moving in the Right Direction**  
**Bob Twerdun, Vice President for Human Capital of MNP LLP**  
Establish a vision, provide occasional direction or encouragement, and your high performers will be off to the races, right? Wrong. What is it that really engages your best people? And equally as important, what is it that keeps your top performers focused and helps them to use their best talents to move the firm forward in the right direction? Don't miss this important session!
- 8:00 – 9:15 am **Examples of Great Partner Goals**  
**Timothy J. Bartz, Chairman of the Board of Anderson ZurMuehlen & Co.**  
Most people understand the idea of good goals, but what about great goals for your firm's highest performers, the partner group? What's different about partner goals and what are the key characteristics you should look for in every partner goal? Join us for this session and learn how great partner goals will help maximize your team's horsepower at all levels.
- 8:00 – 9:15 am **Overcoming the Seven Deadly Sins of Delegation**  
**Jennifer Wilson, Partner and Co-founder of Convergence Coaching, LLC**  
In today's world, delegation is a "must have" leadership skill. No organization can survive succession, thrive, or grow to its full potential without leaders who know how to delegate. Unfortunately, skillful delegation is more frequently discussed than practiced. What are the seven deadly sins of delegation and how can you avoid committing them? Join us for this session to find out and learn how to empower and develop others!
- 9:15 – 9:30 am Break
- 9:30 – 10:45 am **Why Does Tom Do That? Understanding Motives (Including Your Own)**  
**Mark Tanenbaum, Partner at The Value Creation Group**  
Why do people do the things they do? As a leader with critical goals that must be achieved, it's essential for you to understand how motives – both your own and others' – influence decisions and actions. This session will present some effective strategies for understanding your own motives and for getting a solid read on the motives of those around you. This is a session you won't want to miss!
- 10:45 – 11:00 am Break
- 11:00 – 12:15 pm **Driving Change with Straight Talk**  
**Jennifer Wilson, Partner and Co-founder of Convergence Coaching, LLC**  
The ability to effectively give and receive feedback is one of the characteristics of a great leader. And yet, many struggle with these important conversations, despite the potential benefits. In this session, we'll explore and practice different ways of talking straight to drive change – without damaging relationships. Come to this session and learn how to hold the crucial conversations that will help your people and your firm succeed!
- 12:15 – 12:30 pm **Closing Remarks**  
**Sam M. Allred, Founder and Director of Upstream Academy**



# CONFERENCE LOGISTICS



## Hotel Reservations

Hotel Contessa reservations can be made by calling (210) 229-9222. You will need to specify the BestPractices Conference to receive the conference rate of \$199 per night. We recommend making reservations by September 22, 2010.

## Travel

The Hotel Contessa is located approximately 9 miles from San Antonio International Airport. SA Trans Airport Shuttle tickets are available at the ticket kiosk in the airport, or reservations can be made at [www.saairportshuttle.com](http://www.saairportshuttle.com).

## To Register

Mail or fax the registration form to: Upstream Academy – BestPractices 2010 • 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 30, 2010. For more information regarding complaint and refund policies, please contact our offices at 406-495-1850.

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

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

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

Firm \_\_\_\_\_

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

Email \_\_\_\_\_

Mailing Address \_\_\_\_\_

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

Phone \_\_\_\_\_

Total Firm Gross Revenue (for breakout session assignment) \_\_\_\_\_

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

### Preference for concurrent sessions Friday morning

- Conflict: Effectively Managing Both Sides of the Equation
- Engaging Your High Performers and Keeping Them Moving in the Right Direction
- Examples of Great Partner Goals
- Overcoming the Seven Deadly Sins of Delegation

### Conference Payment (ask us about a 5% discount for 5 or more participants)

- 1st Participant from Upstream Academy Network (UAN) Member Firm \$ 895
- Additional Participant from Upstream Academy Network (UAN) Member Firm \$ 795
- 1st Participant from Non-UAN Member Firm \$1195
- Additional Participant from Non-UAN Member Firm \$ 795

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.



BestPractices Conference  
P.O. Box 1147  
Discovery Block  
Great Northern Town Center  
828 Great Northern Blvd., 4th Floor  
Helena, MT 59624-1147

Only the first 120 registrants are guaranteed participation in this leading-edge event.