



Upstream Academy's Premier Event  
for Leading Partners in Accounting Firms



July 21-22, 2022 • Park City, Utah

# HEADWATERS 2022

EMBRACING CHANGE  
DURING UNCERTAINTY

## DON'T LET WHAT YOU THINK YOU KNOW LIMIT YOUR FIRM'S SUCCESS IN THE NEW REALITY

Anyone who's tried to get in better shape, learn a new language or develop a new skill recognizes that good habits ensure long-term success in many things. But holding onto outdated, inefficient, and cumbersome habits, processes and policies can severely limit your firm's options for the future.

Join us for HeadWaters 2022 and we'll provide practical examples and best practices for embracing the changes you need for your firm to thrive in uncertain times.





# CONFERENCE SPEAKERS/FACILITATORS

## The Conference

During the HeadWaters Leadership Conference 2022, industry experts will provide step-by-step guidance to help your firm adapt to the new environment. Here's a sampling of topics:

- Embracing a new way of thinking about our "return to normal"
- Rethinking productivity and work/life integration
- Intentionally developing new leaders
- Analyzing and updating your path to partner
- Modifying firm leadership structures for sustainability
- Cultivating innovation
- Analyzing and updating your partner compensation
- Engaging your people by channeling passion and purpose
- Rethinking client service
- Driving change

## The 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.

Don't re-create the wheel. Learn from those who have thought through the issues and developed practical, real-world solutions you can immediately implement in your practice.



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**Heath Alloway**  
Director at  
Upstream Academy



**Sam Allred**  
Director at  
Upstream Academy



**Marty Brown**  
President and CEO  
of PYA



**Jennifer Cantero**  
Director of  
Sustainability at Sensiba  
San Filippo, LLP



**Steve Castino**  
Executive Partner  
at Vestal & Wiler



**Jeremy Clopton**  
Director at  
Upstream Academy



**Courtney DeRonde**  
Managing Partner at  
TDT CPAs & Advisors



**Julie Eisenhauer**  
Shareholder at  
Clark Nuber PS



**Jennifer Harris**  
Shareholder at  
Clark Nuber PS



**Kristen Rampe**  
Managing Principal at  
Rampe Consulting



**John Sensiba**  
Managing Partner at  
Sensiba San Filippo, LLP

# CONFERENCE AGENDA

## Thursday, July 21, 2022

7:00 – 8:00 am Breakfast

8:00 – 8:15 am Welcome

8:15 – 9:30 am **Creating a Culture Open to Change**

**Jeremy Clopton, Director at Upstream Academy**

As the world changes, firms who try to “return to normal” may find this a moving target. As Claude Bernard noted “It is what we think we know already that often prevents us from learning.” When something contradicts our current understanding, many of us will dismiss the idea outright. This saves us from crackpot conspiracy beliefs, jumping too quickly on bandwagons and inconsistent behavior, but can be a major impediment when we are forced to adapt. Join Jeremy for an insightful look at how to ensure you are challenging the right assumptions, creating a process to rethink outdated, incorrect and stale ideas, and building a culture that thrives during change.

9:30 – 9:45 am Break

9:45 – 11:00 am **Redefining Productivity**

**Courtney DeRonde, Managing Partner at TDT CPAs & Advisors**

The equation seems simple: more hours = more productivity. Have too much work? Eat at your desk, stay late, come in early, and add a few days to the workweek. Unfortunately, many individuals (and firms) have found that burning the candle at both ends ensures a quick burnout. Let’s examine the mindset that told a generation to put their heads down and push through. Does the research support this? Does the profession’s experience prove this? Will the next generation buy into this concept? Join Courtney for a discussion of a new way to look at productivity, work/life integration and firm success that helps you and your staff become more productive and remain free of burn-out.

11:00 – 11:15 am Break

11:15 – 12:30 pm **Giving Younger Staff a Voice and Path for Intentional Development**

**Marty Brown, President and CEO of PYA**

Most firms have an untapped resource – the fresh, innovative, tech-savvy perspectives of younger staff. When firms only give experienced staff a voice, they not only lose opportunities for input, but also the chance to build a more engaging culture. Is your firm focused on providing the opportunities and training needed to help the best and brightest share their insights and build an exciting career, regardless of years of service? Join Marty as he shares insights on how to tap into the power of your entire firm by giving younger staff a voice and a path for intentional development.

## Thursday, July 21, 2022 (continued)

12:30 – 1:30 pm Lunch

1:30 – 2:45 pm Concurrent Sessions (choose one of four)

### **Rethinking the Path to Partner**

**Jennifer Cantero, Director of Marketing & Sustainability at Sensiba San Filippo, LLP**

Most firms recognize that the path to partner is changing. Firm offerings, firm clients and firm member expectations have changed – so has your firm changed its expectations for partnership? Can you imagine the benefits if everyone in the firm were encouraged to perform like a potential partner? Join Jennifer as she shares insights about her path from Director of Marketing to Practice Leader and discusses how to rethink your process for recruiting, training and guiding your next generation of partners. Join us for specific, practical, and actionable ways to help your people advance more quickly to give you the competitive advantage of having a firm comprised of highly skilled, fully developed, partner-ready professionals.

### **Modifying Firm Leadership Structures for Sustainability**

**Steve Castino, Executive Partner at Vestal & Wiler**

For a variety of reasons, many of your firm’s talented, ambitious and driven emerging leaders may be unwilling to commit to partnership under a traditional model. Does this mean they are banned from becoming firm leaders? Think again. If your firm is unwilling to create part-time partners, provide leadership roles (and salaries) to non-partners, or consider other leadership alternatives – you may find your best people pursue this option elsewhere. Don’t lose your top talent and sabotage your firm’s succession plans by attempting to force everyone into the Baby Boomer mold. Let’s discuss pitfalls to avoid, safeguards to include and ways to make alternative leadership models a true win/win.

### **Cultivating Innovation Instead of Waiting for Brilliance to Strike**

**Heath Alloway, Director at Upstream Academy**

Scientific invention is often portrayed as coming from a sudden burst of insight like a bolt from the blue, but more often it’s the result of hard work and an ability to create an atmosphere where innovation thrives. As our profession changes, your firm’s ability to innovate can set you apart, drive ingenious client and firm solutions, and help you quickly and creatively capitalize on changes. So, when brilliance doesn’t strike, how do you jumpstart innovation? Join us for an insightful look at how to help firm members brainstorm creative ideas for firm and client problems by creating a culture that promotes innovative thought – so you can call the lightning rather than waiting for inspiration to strike.



# CONFERENCE AGENDA

## Thursday, July 21, 2022 (continued)

1:30 – 2:45 pm Concurrent Sessions (choose one of four)

### **Rethinking Partner Compensation to Drive Partner Satisfaction**

**Kristen Rampe, Managing Principal at Rampe Consulting**

Partners want to do what's in the firm's best interest, but too many compensation systems inadvertently discourage a firm-centric attitude with confusing, outdated or book-based provisions that leave everyone frustrated. There's no silver bullet for this issue, but the first step is recognizing that partner behavior and partner compensation are inexorably linked. During this time of flux, partner compensation can either hold the firm back or drive it forward. Join Kristen as she takes a deep dive into how to structure fair, equitable agreements that remove the mysteries and protect both the partner and the firm, encouraging and rewarding partners for doing what's in the best interest of the firm long-term.

2:45 – 3:00 pm Break

3:00 – 5:00 pm **Discussion Forums: Shared Challenges, Shared Solutions**

**Sam Allred, Heath Alloway, Marty Brown, Jeremy Clopton, Kristen Rampe and John Sensiba**

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, July 22, 2022

7:00 – 8:00 am Breakfast

8:00 – 9:15 am **How Purpose and Passion Can Engage and Lead to Profits**

**John Sensiba, Managing Partner at Sensiba San Filippo, LLP**

Passion gives us purpose, driving our effort, attitude and desire. So, can you imagine the impact of having everyone on your team passionate about making progress? The key to getting the most from all your people is to connect their passions to the work the firm is doing for clients and the community. But how do you do this? Join John as he discusses how to discover passions that intersect with firm vision, how to integrate individual passions with career goals, and how to effectively customize adaptable careers that take full advantage of individual passions and lead to greater engagement for the individual and greater profit for the firm.

9:15 – 9:30 am Break

9:30 – 10:45 am **Stop Forcing Your Llamas to Eat Goat Chow: Rethinking Client Service**

**Julie Eisenhower and Jennifer Harris, Shareholders at Clark Nuber PS**

Did you know Purina makes feed specifically for llamas? The average person may not think it differs much from Goat Chow, but you can bet anyone who raises show llamas has done the calculations. Are you expecting your llama clients to eat goat food? Client service is more than creating great services, it means providing great services the client wants and needs. Join us as Julie and Jennifer discuss how their firm has taken client services to the next level by initiating more in-depth client conversations from the start to ensure they understand the client, the issues and desired outcomes before they even start providing billable work.

10:45 – 11:00 am Break

11:00 – 12:30 pm **Taking What You've Learned and Driving Change**

**Sam Allred, Director at Upstream Academy**

Knowing what needs to change is the first step – but making a plan to implement those changes is the true goal. Managing change is hard work under even the best conditions – let alone in our fast-paced business world. 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? Sam will discuss the barriers to change and a process to help you get buy-in, empower your change agents and implement a process to help your firm successfully implement positive change.



# THE LOCATION

## Park City

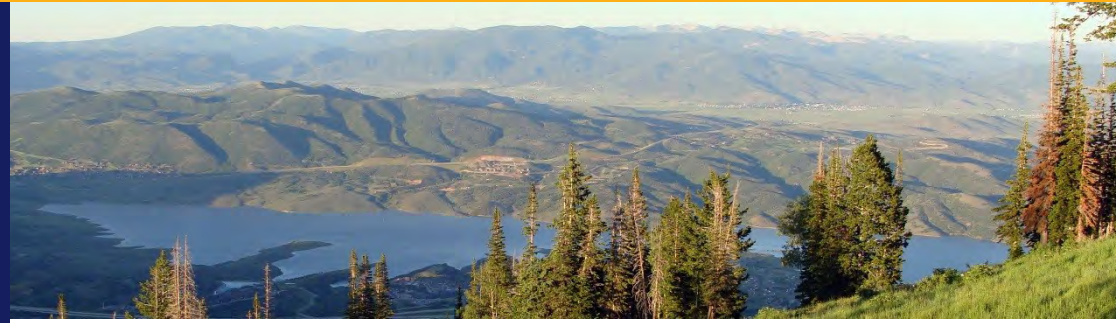
We return this year to beautiful Park City, Utah, nestled under Rocky Mountain peaks and an easy 45-minute drive from Salt Lake City Airport. The Park City area offers something for everyone including over 100 restaurants, factory outlet stores, quaint shops, fly fishing, mountain biking, hiking, horseback riding, water sports and more.

## Hotel Information

This year's conference will be held at the Stein Eriksen Lodge located at 7700 Stein Way in Park City, Utah. Reservations can be made [online](#) or by calling 800-453-1302. You will need to specify Upstream Academy to receive the special conference rate of \$344.00 (which includes the \$25 resort fee). We recommend making your reservation by June 12, 2022. If you have any problems with hotel reservations, please don't hesitate to contact us for assistance.

## Air Travel Information

The hotel is located approximately 45 minutes from the Salt Lake City airport.



## Conference Meal Information

Breakfast and lunch will be provided on Thursday and breakfast will be provided Friday. All meals will be served buffet style. You and your adult guest are also welcome to join us for the reception Thursday evening. If you have special meal requests, please contact Kelsey Mundt at (406) 495-1850 or email at [kelseym@upstreamacademy.com](mailto:kelseym@upstreamacademy.com).

## To Register

Go to [www.upstreamacademy.com/headwaters.asp](http://www.upstreamacademy.com/headwaters.asp) or call 406-495-1850.

## Cancellation Policy

Registrants will be refunded registration fees less a \$100 cancellation charge, if they notify Upstream before June 13, 2022. After this date, only \$200 will be refunded.

# 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 HeadWaters Conference you will be able to identify and implement improvements to your leadership skills, as well as your firm's leadership development processes.

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 submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

