



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



July 13-14, 2023 • Denver, Colorado

HEADWATERS 2023

NEW STRATEGIES
FOR A SUCCESSFUL FUTURE

DO YOU HAVE THE STRATEGIES YOU NEED TO HANDLE RECENT CHANGES?

Don't go it alone.

Innovative, strategic, forward-thinking leaders have created solutions to some of your firm's toughest issues.

Join us for HeadWaters 2023 to hear from the experts as they provide practical examples and best practices for the best new strategies.





The Conference

The last few years have seen enough upheaval for even the most optimistic to start feeling some change-fatigue. Strategic, forward-thinking and decisive leadership will help the entire firm move more confidently toward a successful future.

During the HeadWaters Leadership Conference 2023, industry experts will provide step-by-step guidance to help your firm understand and implement new strategies for success.

Here's a sampling of topics:

- Determining how a vision can impact strategy
- Leading with a people-first focus
- Bringing your authentic self to your leadership
- Navigating hiring and development for non-accountants
- Keeping growth as a focus regardless of business climate
- Crafting more successful M & A
- Creating more value for your firm and your clients
- Knowing when to pursue a different vision
- Aligning objectives across the firm
- Finding new ways to apply time-tested strategies



Phone: 406-495-1850

E-mail: info@upstreamacademy.com

Website: www.upstreamacademy.com

CONFERENCE SPEAKERS/FACILITATORS

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.

Learn from those who have thought through the issues and developed practical, real-world strategies you can immediately implement in your practice.



Heath Alloway
Director at
Upstream Academy



Sam Allred
Director at
Upstream Academy



Marty Brown
President and CEO
of PYA



Jeremy Clopton
Director at
Upstream Academy



Courtney DeRonde
CEO at Forge Financial &
Management Consulting



Joey Havens
Managing Partner of
Strategic Growth at
HORNE



Bethmara Kessler
Former Head of Integrated
Global Services, Campbell
Soup Company



Harry Plack
Managing Member at
Plack Group, LLC



Bruce Zicari
CEO at
The Bonadio Group



John Sensiba
Managing Partner at
Sensiba San Filippo, LLP

CONFERENCE AGENDA

Thursday, July 13, 2023

7:00 – 8:00 am Breakfast

8:00 – 8:15 am Welcome

8:15 – 9:30 am **Before New Strategies, You Need a New Vision**

Jeremy Clopton, Director at Upstream Academy

If you don't know where you're going, it's not going to much matter how you get there – yet individuals, teams and firms often start making plans and setting strategy before they've clearly identified (and articulated) their vision. Join Jeremy as he discusses how to craft and communicate a compelling vision that will help you and your team find the excitement, energy and motivation to work at making that vision a reality.

9:30 – 9:45 am Break

9:45 – 11:00 am **Leading with Significance: Creating a Magnetic, People-First Culture**

Joey Havens, Managing Partner of Strategic Growth at HORNE

Most firms list people as a priority, but too often firm members don't feel the impact of this philosophy. Don't settle for a "good enough" culture. Join Joey as he shares some of the innovative ways they are creating a people-first culture that makes firm members reluctant to leave: transitioning away from traditional firm metrics, implementing fearless flexibility, using full-potential coaching and following through on a goal of over-recruiting by 10%.

11:00 – 11:15 am Break

11:15 – 12:30 pm **Keeping it Real: Leading with Authenticity**

Bethmara Kessler, Former Head of Integrated Global Services, Campbell Soup Company

When you show up at work do you keep it real or do you morph into an alternate version of yourself? Leadership can be a tenuous balancing act between managing the personas that you project to others and meeting the challenges of the moment. The masks and armor that you wear as a leader can erode the authenticity of the person beneath the facade, directly impacting your effectiveness and how your teams show up in the workplace.

12:30 – 1:30 pm Lunch

Thursday, July 13, 2023 Breakout Sessions

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

Practice Development in Non-traditional Niches: With Accountants *and* With Other Professionals

Marty Brown, President and CEO of PYA

As firms trend toward more business consulting and less traditional accounting, effective hiring and business development becomes even more challenging. The skills required for non-traditional niches may not be as easily defined and firms may need to reassess traditional processes. Marty leads a firm with a successful advisory practice which annually produces over 55% of firm revenues. Join Marty as he shares his insights on how to pinpoint skills, locate candidates, develop business, and adapt to help your firm find success.

Maintaining a Growth Mindset in Both Prosperity and Uncertainty

Heath Alloway, Director at Upstream Academy

When business is scarce, most firms list growth as a priority. But, when times are good and work is rolling in, this focus often becomes fuzzy – with opportunities ignored, referral sources allowed to dry up, and proactive growth put on the back burner. A growth mindset is more than bringing in business, it's ensuring you have the right business and holding the door open for opportunity. Join Heath to discuss how to develop a long-term growth mindset.

Making Mergers and Acquisitions Successful

Bruce Zicari, CEO at The Bonadio Group

Potentially a great way to grow your firm, mergers and acquisitions are also minefields for the poorly prepared. So, why do some succeed while others crash and burn? How can you determine if a potential opportunity is a good fit for your firm? And, how can you increase the likelihood of successful culture integration post-acquisition? Although, no one's found a magic formula for ensuring success, Bruce will discuss some key components and best practices.

All About Value: Creating, Providing, and Realizing Value

Harry Plack, Managing Member at Plack Group, LLC

Client relationships matter. But if you can't provide value, your clients may tell you how much they'll miss you and take their business elsewhere. The ability to successfully envision, vet, build and launch new services provides a huge competitive advantage. Join Harry for a discussion of proven principles, best practices, and hints and tips to help you successfully brainstorm new ideas, evaluate their viability, and create the value your clients crave.

CONFERENCE AGENDA

Thursday, July 13, 2023 (continued)

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, Courtney DeRonde 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 14, 2023 (continued)

7:15– 7:45am

Mental Health Discussion

Randy Crabtree, Partner at Tri-Merit, and Jeremy Clopton, Director at Upstream Academy

Mental health has become a more pressing (and publicly-discussed) issue in accounting firms. Join Randy and Jeremy for a candid discussion about their efforts to safeguard their own mental health, the signs you or a team member may be struggling, and what you can do to address similar issues. They'll also discuss how Randy's experiences led him to reevaluate his strengths and role in the business in a way that positively impacted both him and his firm.

8:00 – 9:25 am

Zigging to Achieve Your Vision When Everyone Else Says to Zag

Courtney DeRonde, CEO at Forge Financial & Management Consulting

Persistence has its virtues, but sometimes changing course ensures a better outcome than doggedly pursuing a vision that no longer fits your career, team or firm. But, when should you zig? And, how do you weigh pros and cons to ensure you're making the right choice? Join Courtney for a candid discussion of lessons learned from her career- and firm-changing decision to split her firm to pursue a different vision and how those lessons can benefit your firm.

9:25 – 9:40 am

Break

9:40 – 10:55 am

Aligning Operational Objectives with Overall Firm Strategy

John Sensiba, Managing Partner at Sensiba San Filippo, LLP

When the strategy meetings are finished and everyone understands the plan, it can be felt like you're done. But plans often meet a slow death when operational objectives are (intentionally or unintentionally) aimed in a different direction. Join John as he discusses what to consider, who to include and how to ensure that plans are aligned across departments, projects and roles to help increase collaboration, optimize resources and make sure everyone's moving in the same direction.

10:55 – 11:10 am

Break

11:10 – 12:30 pm

Time-Tested Strategies for Change

Sam Allred, Director at Upstream Academy

Sam has spent his career providing value and thought leadership to the industry, individual firms and our team. Join us as he shares insights from the last 40 years of changes he has witnessed, participated in and helped drive. He'll share some of the hinge points that have made the biggest impacts on the profession, how firms' approaches have shaped their response and their success, and how these same strategies can be applied to future problems.

THE LOCATION

Denver

The conference returns to Denver, the Mile High City, this year. With the beautiful Rocky Mountains as backdrop, Denver offers stunning architecture, award-winning dining opportunities, and an exciting array of pre- or post-conference recreation opportunities, including the 16th Street Pedestrian Mall, Larimer Square, the Denver Art Museum, Confluence Park, the Denver Zoo, Red Rocks Amphitheatre, and the Denver Museum of Nature & Science.

Hotel Information

This year's conference will be held at the Hyatt Regency Denver at Colorado Convention Center located at 650 15th Street, Denver, CO 80202. Reservations can be made [online](#) or by calling 800-223-1234. You will need to specify Upstream Academy to receive the special conference rate of \$269.00. We recommend making your reservation by June 13, 2023.

Air Travel Information

The hotel is located in downtown Denver, approximately 40 minutes from Denver International 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.

Cost and Registration

Registration is \$1,350 per person (\$1,150 for [UAN](#) members) Go to www.upstreamacademy.com/headwaters/ to register 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, 2023. 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 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.

