

Emerging Firms Circle Agenda

August 23 – 24, 2010

Sunday, August 22, 2010

- 1:00-5:00 **Pre-Conference – Breaking the Cubicle Culture**
[View agenda and register online.](#) \$99 per person
- 5:00-7:00 **Registration, Sponsor Displays, Welcome Reception**

Monday, August 23, 2010

- 7:30-8:30 Breakfast and Sponsor Displays (Century AB – Ballroom Level)
- 8:30-8:45 **Welcome and Introductions** (Century C – Ballroom Level)
- 8:45-9:45 **Strategy & Vision of the Future**
L. Gary Boomer, Boomer Consulting, Inc.
- 9:45-10:15 Break and Sponsor Displays (Century AB – Ballroom Level)
- 10:15-12:15 **How to Demystify IT for Your CEO**
Harwell Thrasher, Author of “Boiling the IT Frog”
Harwell Thrasher, author, commentator, strategist and former IT executive, believes IT is more about people than technology, and that most IT problems come from misunderstandings between business and technology people. In this keynote, Harwell will explain all of the things about IT that business people really need to know. This isn't the technical stuff; it's the IT issues caused by various factors outside the control of the IT group – the things that tend to make IT unsuccessful no matter who the people are in the IT or business roles. Take these factors into account in your planning, and your business IT will become wildly successful.
**Each attendee will receive a copy of Harwell's book, “Boiling the IT Frog”.*
- 12:15-1:10 Luncheon courtesy of Summit Sponsors (Century AB – Ballroom Level)
- 1:10-2:00 **Positive focus** (Shawnee Mission – Ballroom Level)
Sandra Wiley, Boomer Consulting, Inc.
Participants will recognize the positive accomplishments made by the firm and in their personal lives over the specified period. The purpose is to shift focus from negative thinking (“look at all our problems”) to positive thinking (“Look at what we've accomplished!”)

Measurement Tool: Each individual will prepare a personal list of positive accomplishments, and then share those list items with the group.

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- 2:00 – 3:15 **Managing People: Performance Assessments and Processes**
Sandra Wiley, Boomer Consulting, Inc.
EFC members will first hear about specific processes and assessment tools that are working in firms today. They will then turn their attention to their firm's current processes and audit them to identify what they can do to improve. Last, they will interact with their peers to share their experiences and their knowledge and gather new ideas.
- Measurement Tool: Firm Performance Management Assessment Tool.*
- 3:15-3:45 Break and Sponsors Displays (Century AB – Ballroom Level)
- 3:45 – 5:00 **Business Development Workshop** (Shawnee Mission – Ballroom Level)
Sandra Wiley, Boomer Consulting, Inc.
This interactive session will challenge EFC members to develop a business development plan for their firm in 90 minutes. Guided by the facilitator, and with the use of an assessment tool, each participant will build a plan that will increase their ability to develop new business upon their arrival home after the conference.
- Measurement Tool: Business Development Workshop*
- 5:00-6:00 Summit Sponsor Displays (Century AB – Ballroom Level)
- 6:00-7:30 **Monday Night Social Event** (Century AB – Ballroom Level)
Separate registration required – No Charge
You will not want to miss the premier social event of the BTC Summit! Sandra Wiley will host this fast paced event focused on getting to know your peers, while discussing industry related topics. Who knows, you may even be eligible for a few prize giveaways...
- 7:30-???
- Dinner on your own

Tuesday, August 24, 2010

- 7:30-8:30 Breakfast and Sponsor Displays (Century AB – Ballroom Level)
- 8:30-9:30 **Technology Update** (Shawnee Mission – Ballroom Level)
Ken McCall, Boomer Consulting, Inc.
EFC members will absorb the most up to date news on technology and what they should be focused on now in their practice. This is a primer session before they venture into the breakout session with their vendor partners.
- Measurement Tool: Technology – Checklist of Priorities*

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- 9:30-10:15 **Vendor Update**
 By CCH (Shawnee– Ballroom Level)
 By Thomson (Mission – Ballroom Level)
 Representative from CCH or Thomson
This breakout session will be tailor made by our vendor alliance members CCH and Thomson specifically for EFC members. Updates, new releases and specific questions from the audience will be addressed during this powerful session.

Measurement Tool: TBD by the Vendor Alliances
- 10:15-10:45 Break and Sponsor Displays (Century AB – Ballroom Level)
- 10:45-12:00 **Vendor Update**
 By CCH (Shawnee– Ballroom Level)
 By Thomson (Mission – Ballroom Level)
 Representative from CCH or Thomson
This breakout session will be tailor made by our vendor alliance members CCH and Thomson specifically for EFC members. Updates, new releases and specific questions from the audience will be addressed during this powerful session.

Measurement Tool: TBD by the Vendor Alliances
- 12:00-1:10 Luncheon courtesy of Summit Sponsors (Century AB – Ballroom Level)
- 1:10-2:00 **Value Proposition of the Cloud** (Century C – Ballroom Level)
 Randy Johnston, NMGI
Cloud computing is a popular topic these days but is the accounting industry ready to make the leap to a new model? In this keynote session, Randy Johnston will address the topics you need to be thinking about today to prepare you for the future including:
- *Risks – What do you need to worry about & how can you mitigate risks?*
 - *Rewards – What benefits can your firm recognize by moving to the cloud?*
 - *Transition – Change isn't easy so how can you smoothly transition to the cloud model?*
 - *Major Players – Who are the key providers of cloud-based services?*
- 2:00-2:10 Prizes
- 2:10-3:00 **Conference Takeaways**
 L. Gary Boomer, Boomer Consulting, Inc.
In this session, Gary Boomer will give a summary of the insights and information shared by all of the Boomer Technology Circle members during the conference.
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