



SPEAKING



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Shareholder, Visionary
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JON HUBBARD
Shareholder, Chief
Growth Officer



AMANDA WILKIE
Consultant

Our consultants have their fingers on the pulse of the hottest issues facing the accounting profession in the five areas critical to success: leadership, talent, growth, technology and process.

We call it The Boomer Advantage.

Some of the topics included here are timeless while others are hot topics for 2024, and we're also happy to customize sessions to fit your needs. Either way, we thoroughly research and regularly update the content of every session to ensure we're bringing you timely insights and guidance.

We offer full- and half-day workshops as well as keynotes and breakouts that will wow your audience while bringing new meaning and clarity to a topic. We look forward to speaking at your next event!



Leadership

- Leading with Intention: Building an Inclusive Culture of Belonging
- Navigating Generative AI: Leading and Preparing for Transformation
- Inspiring Innovation in Your Firm: Everyone Has the Ability to Innovate
- The Intentional Succession Plan
- Getting to the Next Level...why "who" is more important than "how"!
- Developing a Firm Culture of Collaboration & Communication
- Mobile Learning for Progressive Managers
- The Future Ready Digital CPA Firm
- Navigating through Long Term Crisis
- Embracing Conflict Management
- Encouraging Critical Thinking Within Your Team
- Six Steps for Adopting a Growth Mindset

Talent

- Top Talent Trends in 2023: From Inside and Outside the Profession
- Navigating Boundaries: What do Employees REALLY Want From Their Career?
- 5 Generations in The Workplace: What you need to know.
- Finishing Strong. A guide to moving from one chapter in life to the next.
- New Leadership: Identifying, Motivating and Selecting the Partners of the Future
- Creating the Inspired Employee Experience
- New Performance Management Strategies in a Remote Environment
- Creating a Sustainable Learning Culture. Learning and Upskilling Trends
- Developing the Client Advisory Professional: New Skills for Our New World
- Collaborative Intelligence - Talent Professionals & Technology Unite

Process

- Elevating Firm Capacity and Profitability through Process Improvement
- Creating and Sustaining Continuous Firm Improvement
- Proven Strategies for Increasing Buy-In and Accountability
- A Continuous Improvement Approach to Leading Change
- Strategies for Increased Leverage & Utilization of Technology
- Maximize Client Value and Effectiveness Through Process Improvement
- Finding the Capacity to Focus on Value Added Opportunities
- Talent Retention through Improved Processes and Technology
- Improving Business Processes With Technology
- Process Improvement Essentials for the Virtual / Hybrid Firm
- Moving from Change Management to Change Leadership

2024 SPEAKING TOPICS



Technology

- How Successful Technology Leaders are Leveraging Change Leadership
- Increasing the Value & Return on Your Technology Investment
- Technology Budgeting: A New Hierarchy for Innovation and Reducing Technical Debt
- The Latest in Blockchain in the Accounting Profession
- Data Analytics - The Who, The What & The How
- How to Develop an IT Strategic Plan
- Accelerations Through the Convergence of Emerging Technologies
- Enabling the Distributed Workforce
- IT's Role in Mergers & Acquisitions
- Leveraging Technology to Build Your Firm's Culture
- The Mobile CPA / What's in My Bag?
- Emerging Technologies: Leveraging Today's Innovations

Growth

- Unleashing AI Marketing Automation for Personalized Campaign Success
- Mastering Video Marketing: Leveraging Short Form Content
- Revenue Replacement: A New Approach to Growth & Client Filtering
- Reframing the Value of Your Services: How to Better Message & Sell Them
- 6 Lead Generating Tools to Grow Your Niche
- Scaling Your Practice Through Business Development & Marketing
- The Advisory Culture – How to Build, Package & Price Your Services
- 7 Essentials When Updating Your Firm's Website
- Developing a Business Development Pipeline That Actually Works
- 5 Simple Steps to Creating a Winning Sales Funnel
- 10 Trends Impacting Leadership and Marketing
- A Proven Framework for Improving Client Experience
- How to Launch a New Service Virtually
- Why Growth Stalls and Sales Stop

2024 SPEAKING TOPICS

Learn more:

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