



2012 CEO Forum • Conference Schedule

February 29th-March 2nd • Westin Kierland Resort • Scottsdale, Arizona

Wednesday, February 29th

- 7:30 am** **Optional Golf**
- 12:15 pm** **Registration/Lunch**
- 1:15 pm** **Welcoming Remarks**
- 1:30 pm** **Keynote Address**

The Great Game of Business

Bill Fotsch, *The Great Game of Business*

How much more profitable do you think your company would be if all your employees were fully engaged in the business, understood how your business worked, and knew exactly what was critical for success? This is how Springfield ReManufacturing Corp.[®] (SRC) turned an initial \$100,000 investment into \$230+ million in equity value. Find out how SRC and other successful companies have applied Open Book Management principles, which they refer to as “the Great Game of Business.”

- 3:00 pm** **Break**
- 3:30 pm** **Roundtable Discussions**

The Great Game of Business

Bill Fotsch, *The Great Game of Business*

“When employees think, feel, and act like owners...everybody wins.” Keynote speaker Bill Fotsch will lead this roundtable on informing, engaging, and empowering employees, with goals and accountabilities tied directly to the success of the firm.

Research-Driven Practice: A Framework for Creating, Marketing, and Applying Knowledge for Competitive Advantage

Chris Parsons, *Knowledge Architecture*

Senior leaders spend the majority of their time on two activities: selling work and managing work. Stewardship of the firm’s most valuable assets, knowledge and people, are delegated, often to lower level information technology and human resources managers. Some firms, often referred to as thought leaders, take a more systematic, intentional approach to acquiring knowledge. Why are these firms different? How do they consistently stay on the cutting edge of practice and technology? Why do they possess such deep insights into their clients’ needs and aspirations?

- 5:00 pm** **Free Time**
- 6:30 pm** **Cocktail Reception and Dinner Event**

Thursday, March 1st

7:30 am Breakfast

8:30 am Roundtable Discussions

Merger and Acquisition Trends and Updates

Colvin Matheson and David Cohen, *Matheson Financial Advisors*

This roundtable will focus on A/E/C industry transaction trends, including valuation trends, deal structure, financing opportunities, and other transaction nuances. The session will also probe the impact of firm capitalization from both the buyer and seller perspective.

Scenario Planning: Connecting Your Firm to the Future

Ray Kogan, *Kogan & Company*

In today's extraordinarily competitive marketplace, strategic planning has become a mainstream management tool used by firms to design, implement, and take control of their future. A growing number of firms are prepared to take it "beyond the basics," applying more sophisticated scenario planning to achieve greater levels of success. Scenario planning considers a range of possibilities (alternative futures) and strategizes how your firm would behave in, or respond to them. Thinking in a future-based manner and developing strategies to more quickly and effectively make decisions will help your firm capitalize on any future circumstances.

10:00 am Break

10:30 am Roundtable Discussions

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Thursday, March 1st

continued

12:00 pm Lunch/Presentation

Global Trends Affecting the Workplace

Laurie Dreyer, Director, International HR, *Stantec*

We've long acknowledged that "the world is getting smaller," but do we fully understand what that means for our businesses and workplaces? Whether or not your company plans to take its business beyond your region or U.S. borders, employee expectations—particularly among our Generations X and Y—and "best employer practices" are increasingly influenced by national and global social, economic, and demographic trends. Laurie will discuss some of the key factors shaping workplace dynamics today, best practices in employee development, and effective strategies toward building a rich and productive work environment.

1:00 pm Break

1:30 pm Roundtable Discussions

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Global Trends Affecting the Workplace

Laurie Dreyer, Director, International HR, *Stantec*

In this smaller breakout group, Laurie will lead discussion on the trends highlighted during lunch and on what participants' firms are experiencing and implementing.

3:00 pm Break

3:30 pm General Session

How Do You Lead?

Dr. E. Michael Lillibridge, *President, PeopleMap Training*

PeopleMap™ provides the foundation and direction for individuals to develop the interpersonal skills needed to be the most successful—to understand themselves better and contribute to high-functioning teams. In this interactive program, CEOs will have an opportunity to learn their own and others' PeopleMap™ Personality Types, and explore strengths and weaknesses.

5:30 pm Free Time

6:00 pm Cocktail Reception

7:30 pm Dinner on Your Own



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8:30 am Roundtable Discussions

Client Research that Drives Firm Strategy

Rich Friedman, Friedman & Partners

Ask a room full of CEOs about client research (e.g., perception studies, client monitoring, project satisfaction surveys), and you're bound to get a mixed bag of responses. Yet many firms highly leverage client research to shape long-term strategic plans, current business plans, project delivery processes, and marketing and business development strategy (including actual lead generation). Using real case studies to start the conversation, this roundtable will analyze success stories—including what each firm did, why they did it, and most critically, what changes they made to strategy and operations based on the research results.

Governance Clinic: How Healthy Is Your Board?

Kathryn Sprankle, Sprankle Leadership

Roundtable discussion of participants' experiences with shareholder education, board nomination and election processes, role of the Chair, meeting dynamic, and board evaluation.

10:00 am Break

10:30 am General Session

Outrunning Commoditization: Developing and Offering New Services

Industry Panel

The world is changing. Your clients' needs are changing. Competitors old and new are trying to poach your clients. An obvious antidote is to continually attract new clients by designing, developing, and promoting new services. Hear from a panel of industry leading CEOs how they've successfully (or not) tackled this challenge.

12:00 pm Lunch

**1:00 pm Adjourn
Optional Golf**