



2019

13TH ANNUAL CEO FORUM SCHEDULE
 mon-wed, feb 25-27, 2019 | westin kierland | scottsdale, az

MON FEB 25

TUE FEB 26

WED FEB 27

7:30
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Pre-scheduled one-on-one clinics with Advisors
Early registration/New attendee meet and greet
Welcome lunch and remarks
General Session: THE NEW NEUROSCIENCE OF REACHING YOUR FIRM'S TRUE POTENTIAL
Break
Roundtable Discussions: (choose one) • The New Neuroscience of Reaching Your Firm's True Potential • Navigating Deal Challenges in a Hot M&A Market
Break
General Session: GROWING YOUR THINKING STYLE
Break
Group cocktails and dinner Marshall's Outpost Pavilion at The Westin Kierland

Breakfast
General Session: EMPLOYEE ENGAGEMENT: IF AT FIRST YOU DON'T SUCCEED...LOOK WITHIN
Break
Roundtable Discussions: (choose one) • Employee Engagement: If at First You Don't Succeed... Look Within • What Story Does Your Organization Structure Tell? • Social Networking in the Workplace
Lunch
General Session: CREATING A GREAT PLACE TO WORK: DEFINING VALUES TO MEASURE CULTURAL ALIGNMENT
Break
Roundtable Discussions: (choose one) • Creating a Great Place to Work • Management Incentive Compensation Plans that Matter • Elevating the Employee Experience through Knowledge Management
Break
Roundtable Discussions: (choose one) • Client Research: Drive Firm Strategy and Make Your Firm Invaluable • Communicating Respect for Many Voices • Navigating Ownership Transition Planning
Break
Group dinner The Mission at Kierland Commons

Breakfast
Roundtable Discussions: (choose one) • Client Research: Make Your Firm Invaluable • Navigating Deal Challenges in a Hot M&A Market • Elevating the Employee Experience through Knowledge Management
Break
General Session ADVISOR DODGEBALL* (*everything you wanted to know about industry business, but didn't ask earlier)
Lunch/Golfers pick up boxed lunch



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GENERAL SESSIONS

THE NEW NEUROSCIENCE OF REACHING YOUR FIRM'S TRUE POTENTIAL

robert cooper, ph.d., founder & ceo, cooper strategic

Bob is a neuroscientist, *New York Times* bestselling author, and high-performance business strategist. He serves as CEO of Cooper Strategic, a global consulting firm drawing on a peak performance database with over a million executives, advisors and professionals—using neuroscience to help record-setting leaders and teams get the most out of their brains, time and performance. Clients include senior executives and top teams at over half of *Fortune's* 100 Best Companies to Work For—along with a range of innovative rising-star enterprises and firms that are disrupting industries and creating vast new opportunities.

EMPLOYEE ENGAGEMENT: IF AT FIRST YOU DON'T SUCCEED...LOOK WITHIN

walt vernon, ceo, mazzetti

How do you attract and retain "THE BEST" people in your industry? There is no Holy Grail in this session because the short answer is, you can't. Not for the obvious reasons, but perhaps less obvious—that not all "THE BEST" talent in your industry is, in fact, best suited for your organization.

This session outlines some of the specific tactics we've used to engage people, and some lessons learned along the way. Among the topics we'll cover:

- Leveraging an entrepreneurial brand
- The pros and cons of having a 501(c)(3)
- Seeking opportunities in research
- The pitfalls of a "transparency policy"
- Developing a "learning" organization

CREATING A GREAT PLACE TO WORK: DEFINING VALUES TO MEASURE CULTURAL ALIGNMENT

lisa brothers, chairman & ceo, nitsch engineering

Peter Drucker says, "The most important thing that leaders do is create and maintain a healthy culture. Culture eats strategy for breakfast!" But what does a healthy culture look like—and how do you measure it?

A great corporate culture must be both intentional and values-driven. Starting in 2011 when Lisa Brothers became CEO, Nitsch Engineering embarked on a journey to better define its culture so leadership and management could be more intentional in its growth.

Using an instrument based on the Barrett Values System, the company implemented a Cultural Values Assessment that measures cultural alignment amongst staff. Lisa will share Nitsch's journey into this values-driven alignment, including the kick-off process for this initiative, implementation challenges, and measurements of success.

GROWING YOUR THINKING STYLE

katie miller, principal, left lane advisors

We all place value in a particular area, be it people, performance, and/or process. Through this session, you will learn more about your own style of thinking and how your style influences your overall decision-making and behavior. Learn what triggers you and why. You will also learn how to think from another point of view, which inevitably brings a more robust culture of trust at all levels within your firm.

ADVISOR DODGEBALL*

(*EVERYTHING YOU WANTED TO KNOW ABOUT INDUSTRY BUSINESS, BUT DIDN'T ASK EARLIER)

Don't miss our closing general session, in which the AIE Advisors stand before the group to catch, not dodge, your questions about any aspect of the business. Whether seeking clarification about points made during the program, or introducing a topic not yet addressed, queue up your queries to share with the group. The Advisors will also bring nuggets from the breakouts to share with all attendees.

And, yes, we will provide projectiles you can lob, pitch, or throw at us to keep us on our toes!



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ROUNDTABLE DISCUSSIONS

NAVIGATING DEAL CHALLENGES IN A HOT M&A MARKET

colvin matheson, founder & managing director, matheson financial advisors

Driven by a robust economy and ongoing industry leadership transitions, 2018 M&A activity has been hotter than ever. Buyers see tremendous growth opportunities—especially in California, Texas, and the Southeast—while potential sellers have never been so busy, asking themselves, “Why sell now?”

These days, to stay current with industry transactional trends and be “ready to play,” every company should include M&A scenarios as part of its future growth planning. In this session, participants will share their experiences from either side of the table and discuss various approaches to navigating a successful transaction—from identifying a “good fit” to negotiating the deal and communicating the process to internal and external stakeholders.

CLIENT RESEARCH: DRIVE FIRM STRATEGY AND MAKE YOUR FIRM INVALUABLE

richard friedman, founder & president, friedman & partners

Ask a room full of CEOs about client/prospect research (e.g., loss debriefs, perception studies, client satisfaction interviews), 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). We will discuss several 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.

COMMUNICATING RESPECT FOR MANY VOICES

cyndi branciforte, hr consultant, hr advisors group

Our businesses are employing a more diverse range of perspectives than ever before—whether related to differing geographies, ethnicities, generations, spiritual beliefs, cultural values, gender identities, and so on.

How are firms responding to the expanding group of voices populating our industry? How are they providing safe space for various perspectives and priorities to feel included in discussions regarding workplace policies and future plans?

In this roundtable, we will discuss how firms are addressing these issues, including specific programs and policies that reflect the shifting priorities of today’s workplace demographics.

WHAT STORY DOES YOUR ORGANIZATION STRUCTURE TELL?

kathryn sprankle, founder, sprankle leadership

A good organization structure can tell us a lot about a company’s culture and priorities. It is the bare bones story of how the company operates. We can see how the firm is led and where authority and accountability lie; how different units interact among each other and with business services; how employees might advance professionally; and how work is delivered (by region? market? service line?).

In this session, we will examine different organization layouts, working with examples provided by participants. Some of the questions we want to answer about each layout:

- Does it make sense?
- Is it sustainable over time—in both thick and thin cycles? Or does it go through short-term shifts?
- How does it reflect culture and priorities?
- Does it tell an accurate story, especially to employees?

MANAGEMENT INCENTIVE COMPENSATION PLANS THAT MATTER

barbara irwin, founder & president, hr advisors group

A meaningful incentive compensation plan reflects a company’s vision (where it’s going) and values (what’s important to its people). It clearly ties rewards to performance that helps the organization achieve its business goals and promote its cultural values. A plan that relates directly to these foundational themes is more likely to meaningfully incentivize performance than a seemingly random series of target metrics that may change year to year.

What does a Bonus Plan that “matters” look like? In this session, we will discuss:

- What’s important in developing and implementing a reward system that reflects the culture and goals of your organization?
- Do the metrics we use to measure performance reflect our specific goals?
- What non-monetary package components can be applied?
- Does the plan provide clarity to participants so they can gauge their progress toward specific rewards?



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ROUNDTABLE DISCUSSIONS

SOCIAL NETWORKING IN THE WORKPLACE—THE BLURRED LINE BETWEEN PERSONAL AND PROFESSIONAL

jason branciforte, *shareholder, littler mendelson, p.c.*

Social media use has been an integral part of our personal lives for decades now. Early on, many organizations limited employee internet access to curb personal use during business hours and to block sites considered NSFW (“not safe for work”). Quickly, those practices became obsolete as online resources became increasingly necessary for business operations as well as employees’ way of life.

Today, the line between personal and professional use of social media workplace is blurred, if it exists at all, and organizations have become more vigilant in controlling how image and reputation are affected by employees’ online lives.

In recent years, establishing Social Media Policies has entered the purview of boards of directors in an effort to control how employee online activity affects organizational culture and external image. In this session, we will discuss:

- What does an effective Social Media Employment policy look like?
- What are the employment law implications of having/not having a policy in your firm?
- How is it communicated to staff and monitored, and what are the consequences of policy breaches?
- What are Leadership’s responsibilities with regard to their own social media activities? (Walking the talk!)
- And, much more!

THE NEW NEUROSCIENCE OF REACHING YOUR FIRM’S TRUE POTENTIAL

robert cooper, ph.d., *founder & ceo, cooper strategic*

In this session, Bob will answer further questions from his general session, as well as address related topics raised by the roundtable group.

EMPLOYEE ENGAGEMENT: IF AT FIRST YOU DON’T SUCCEED... LOOK WITHIN

walt vernon, *ceo, mazzetti*

In this session, Walt will answer further questions from his general session, as well as address related topics raised by the roundtable group.

CREATING A GREAT PLACE TO WORK: DEFINING VALUES TO MEASURE CULTURAL ALIGNMENT

lisa brothers, *chairman & ceo, nitsch engineering*

In this session, Lisa will answer further questions from her general session, as well as address related topics raised by the roundtable group.

ELEVATING THE EMPLOYEE EXPERIENCE THROUGH KNOWLEDGE MANAGEMENT

chris parsons, *founder & ceo, knowledge architecture*

New technologies, cultural and demographic shifts, and a booming economy are giving AEC firms the opportunity to redesign the way they attract, engage, and develop employees. Industry leaders are investing in knowledge management program elements like internal communications, learning & development, mentorship, communities of practice, and intranets to help elevate their employees’ experience. Join us for a lively roundtable discussion about making your AEC firm a greater and smarter place to work through knowledge management.

NAVIGATING OWNERSHIP TRANSITION PLANNING

david cohen, *managing director, matheson financial advisors*

Balancing the creation of something buyers want to invest in and figuring out who to move the ownership to—against the mechanics of managing the transaction—makes ownership transition one of our industry’s greatest challenges. How are firms positioning their ownership solution for the future? Is internal ownership transition still a viable strategy given the differences in behavior, as well as career and investment goals, among the generations? What’s working? What’s not working? We will discuss a variety of ownership transition strategies that may work for you and your firm in remaining independent.