



A|E Advisors
ANNUAL
CEO
FORUM

16th Annual CEO Forum
March 6-8, 2023

The Ritz-Carlton
Key Biscayne, FL

SCHEDULE

Monday, March 6

7:30 - 11:30 AM	1-to-1 Consulting Sessions with A/E Advisors
11:30 - 11:45 AM	Welcome/Introductions
11:45 AM - 12:30 PM	Lunch
12:30 - 2:00 PM	Keynote: John Martin, President and CEO, SIR Institute for Tomorrow
2:00 - 2:30 PM	BREAK
2:30 - 3:45 PM	Breakouts: <ul style="list-style-type: none">▪ 2030 & Beyond: What's Ahead for the A/E and Environmental Consulting Industries▪ Strategic Planning: Lessons Learned & Pitfalls to Avoid
3:45 - 4:15 PM	BREAK
4:15 - 5:30 PM	Breakouts: <ul style="list-style-type: none">▪ New CEO Roundtable▪ Top Risk Factors Facing Our Industry▪ Disruption, Innovation and the New Tech-Driven CEO
6:00 - 9:00 PM	Cocktails/dinner on-site

Tuesday, March 7

7:30 - 8:30 AM	Breakfast
8:30 - 9:45 AM	Main Session: New CEO Panel
9:45 - 10:00 AM	BREAK
10:00 - 11:15 AM	Breakouts: <ul style="list-style-type: none">▪ Strategic Planning: Lesson Learned & Pitfalls to Avoid▪ Disruption, Innovation and the New Tech-Driven CEO▪ Top Risk Factors Facing Our Industry
11:15 AM - 12:15 PM	Lunch

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SCHEDULE, CONT.

12:15 – 12:30 PM	BREAK
12:30 – 1:45 PM	Breakouts: <ul style="list-style-type: none">▪ Does Your Governance Structure Reflect Corporate Priorities?▪ Meeting the Talent Challenge: What's the CEO's Role?▪ Ownership Transaction Trends
1:45 – 2:15 PM	Leave for Off-site Activities
2:15 – 6:15 PM	Off-site Activities: Everglades Airboat or Wynwood Walls
6:30 – 10:00 PM	Dinner at the Rusty Pelican

Wednesday, March 8

7:30 – 8:30 AM	Breakfast
8:30 – 9:45 AM	Breakouts: <ul style="list-style-type: none">▪ Does Your Governance Structure Reflect Corporate Priorities?▪ Meeting the Talent Challenge: What's the CEO's Role?▪ Ownership Transaction Trends
9:45 – 10:15 AM	BREAK
10:15 – 11:30 AM	Main Session: When Bad Things Happen to Good CEOs Panel
11:30 – 11:45 AM	Closing remarks
11:45 AM	Boxed Lunch

SESSIONS

2030 & Beyond: What's Ahead for the A/E and Environmental Consulting Industries ★KEYNOTE

JOHN MARTIN, PRESIDENT AND CEO, SIR INSTITUTE FOR TOMORROW
MONDAY, MARCH 6 • 12:30 – 2:00 PM & 2:30 – 3:45 PM

One of the top issues keeping CEOs up at night is how, in this era of constant change, can we plan for the future with any degree of certainty. John W. Martin will provide the answer. John will share the transcendent trends shaping our future. This includes how demographic, generational, and cultural forces will impact the A/E and Environmental Consulting Industry's future workforce, workplace, design-build contracting, infrastructure investment, and overall building and community design. John's remarks will lay out a fascinating and unexpected blueprint on what forward-looking CEOs must do today to keep their companies relevant and competitive tomorrow.

Strategic Planning: Lesson Learned & Pitfalls to Avoid

BARBARA IRWIN & RICHARD FRIEDMAN
MONDAY, MARCH 6 • 2:30 – 3:45 PM
TUESDAY, MARCH 7 • 10:00 – 11:15 AM

Like squirrels gathering nuts for the winter...a common year-end sight within A/E and Environmental Consulting firms is the strategic planning process. For some firms, it can feel like going through the motions. For others, it's a high-impact, transformative process that inspires participants and non-participants alike. What separates strategic planning success stories from failures? What are realistic results to expect? How can your firm maximize its strategic planning ROI? Share your stories, experiences, and questions in this interactive roundtable.

Disruption, Innovation and the New Tech-Driven CEO

AKSHAY MAHAJAN, GENERAL MANAGER, UNANET
MONDAY, MARCH 6 • 4:15 – 5:30 PM
TUESDAY, MARCH 7 • 10:00 – 11:15 AM

The landscape of doing business in the A/E/C Industry has changed. Modern technology has given us the opportunity to work smarter and is becoming a key differentiator between industry leaders and laggards. But how can A/E/C executives lean forward into tech disruption? How can you leverage technology to foster successful projects, delight customers, and become more profitable? Join us to discuss the core concepts of the modern, tech-driven A/E/C firm and how you can apply these concepts to increase competitive impact, win the right business, and build a sustainable future for your firm.

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SESSIONS, CONT.

Top Risk Factors Facing our Industry

MATT GOUGH

MONDAY, MARCH 6 • 4:15 - 5:30 PM

TUESDAY, MARCH 7 • 10:00 - 11:15 AM

The complexity of the design and construction industry has only grown in recent years and continues to be further impacted by the pandemic. To prosper in such a challenging market, design and construction professionals must understand changes in the industry and the current risk environment that firms are facing to avoid coverage gaps. We will discuss five key trends that we believe will drive professional liability insurance needs for design and construction professionals in 2023.

New CEO Roundtable

KATHRYN SPRANKLE

MONDAY, MARCH 6 • 4:15 - 5:30 PM

Becoming a firm's CEO is a momentous time for the new appointee and one that perhaps presents the greatest professional challenges of their career. A global pandemic and its fallout adds a wholly unexpected dimension to those challenges.

This roundtable is an opportunity for executives who have assumed their positions since early 2020 to share and compare their unique experiences leading their companies through the most turbulent business environment since the recession of 2008.

New CEO ★PANEL

DAVID COHEN, MODERATOR

TUESDAY, MARCH 7 • 8:30 - 9:45 AM

The last three years have presented unprecedented challenges for executive leaders as they continue to lead through an uncertain, sometimes volatile, business environment. This panel will highlight the fresh insights of new CEOs tackling these challenges without the benefit of more seasoned hindsight. Do their new perspectives provide them advantages in dealing with new issues?

Ownership Transaction Trends

DAVID COHEN & COLVIN MATHESON

TUESDAY, MARCH 7 • 12:30 - 1:45 PM

WEDNESDAY, MARCH 8 • 8:30 - 9:45 AM

According to Pew Research Center, the rate of retirement of Baby Boomers has increased since the COVID-19 pandemic. Our discussion will focus on the current trends being utilized in ownership transition programming. We will further explore developing future leaders while building businesses with multiple paths to owner liquidity in order to position your firms for long-term success in a multi-generational environment.

SESSIONS, CONT.

Does Your Governance Structure Reflect Corporate Priorities?

KATHRYN SPRANKLE

TUESDAY, MARCH 7 • 12:30 - 1:45 PM

WEDNESDAY, MARCH 8 • 8:30 - 9:45 AM

Take a look at a company's Board and its executive leadership structure, and you will see what's really important to that firm. What do your employees see when they look at the organization chart? What is apparent to your clients and the larger business community when they see how your top leadership positions are organized and populated?

This discussion goes beyond the optics and asks bluntly, "Have we prioritized the right executive positions in our organization and populated them with the right talent? Does our Board of Directors have the Right Stuff to support and direct our CEO?"

Meeting the Talent Challenge: What's the CEO's Role?

BARBARA IRWIN & RICHARD FRIEDMAN

TUESDAY, MARCH 7 • 12:30 - 1:45 PM

WEDNESDAY, MARCH 8 • 8:30 - 9:45 AM

This roundtable discussion will explore what CEOs are doing to embrace the continuous challenges and opportunities for talent acquisition and retention. Some of the areas we will explore include:

- How strategic plans are tied to talent management
- Creating engagement programs aligning with the firm's culture
- Balancing recruitment of top talent while ensuring internal equity
- Empowering leadership teams to empower their teams
- Steps CEOs are taking to develop talent
- Embracing the continuous changes in the workforce (hybrid, generational, etc.)
- Creating programs that are meaningful and sustainable, and more.

When Bad Things Happen to Good CEOs ★PANEL

RICHARD FRIEDMAN, MODERATOR

WEDNESDAY, MARCH 8 • 10:15 - 11:30 AM

Cybersecurity attacks. The unexpected passing of a firm Principal. Lawsuits—frivolous or otherwise. These events can test the mettle of even the most seasoned CEOs. Hear this riveting panel discussion involving fellow CEOs who have faced the proverbial abyss and successfully led their firms through crisis. What did they do well? What would they have done differently? What advice do they have for their peers? Don't miss this powerful session on the final day of our A/E Advisors CEO Forum.