Advisory Symposium 2022

THOMSON REUTERS®

ADVISORY SYMPOSIUM

Thomson Reuters Advisory Symposium aims to help practitioners elevate their advisory journey and capitalize on the success of their business. Create your opportunity by joining advisory workshops, peer-to-peer discussions and collaborations, panels of industry experts, and much more.

This 3-day Advisory Symposium will bring both advisors in practice and practitioners who are ready to leave the grind behind and invest in strategic thinking to transform their practice into a more progressive firm!

Whether you are kickstarting your advisory journey or looking to advance your advisory services, we have a track for you.

TRACK 1 – Firms who need to kickstart their advisory journey should attend this track.
DAY ONE
Keynote – Paul Miller | Business by Design
Session A In this session of Architect of a Breakthrough Firm (Part 1), you will learn how to transform your traditional tax and accounting firm into an advisory firm. • You will hear the methodology behind the need for the transition as well as hear the transformation journey of one of our advisors in practice.
Session B In this session of Architect of a Breakthrough Firm (Part 2), you will go through an exercise to evaluate your current responsibilities within your firm and learn ways to start your transformation to a breakthrough firm.
Session C In this session we will kick-off with our breakthrough Building your Firm's Service Structure by creating a service menu and clearly defining value-add advisory services from compliance services. • You will learn how to become more profitable by packaging your services. We will show sample templates for defining scope, provide examples, and share best practices. • You will hear how one of your peers restructured their offerings and pricing.
Advisory Panel – Powerhouse Firm Manager's Panel
DAY TWO
Keynote – Rick Sager, CPA | Sager CPAs
Session D In this session we will continue our breakthrough Delivering a Value Proposition (Part 1) by sharing how you introduce new clients and transition existing clients to advisory services. • You will learn how to execute on the Two-Meeting approach from one of our advisors who have successfully implemented this methodology.
Session E In this session of Delivering a Value Proposition (Part 2), you will gain a full understanding of how the Two-Meeting approach plays out with a client. Be ready to ask questions after observing the Advisory and Client role play of the two meetings.
Roundtable Event
Advisory Panel – Firm Leaders Panel
DAY THREE
Session F This session will take you through different aspects to how best manage in a Hybrid Work Environment. • Managing your firm's resources, including remote staff and outsourced staff. • Practice management and technology security best practices.
Keynote – Andrew McCracken, CPA | Thomson Reuters

*Agenda is subject to change

TRACK 2 – Practice Forward Graduates who want to advance their advisory journey should attend this track.

DAY ONE

Keynote – Paul Miller | Business by Design

Session A

This session will help you understand your firm's Key Performance Indicators (KPIs) and set Goals and Strategies to grow your bottom line.

- Explore Practice Forward methodology and tools to help develop strategies.
- "Move the dial" of your firm's metrics to enhance your advisory transformation.

Session B

This session will explore real-life experiences of transitioning existing clients into the Practice Forward model and on-going transition and departure challenges.

- Gain insight into when existing clients are ready for the transition.
- Explore real-life examples of successful and unsuccessful transitions, including what works well and what doesn't
- Review specific tools to assist with transitions.
- Review the mindset of a new approach to business and the critical importance of excellent communication.
- Discuss client departure – both intentional and unintentional – and how to execute this with purpose.

Session C

This session will discuss advisory beyond the basics; you will have the opportunity to engage with your peers and have discussions around various advisory strategies.

- One of our Practice Forward advisors will share their strategies and technology they use in their firm to provide value-add advisory services to their clients.
- You will have the opportunities with your peers to further discuss strategies and share tools you use or have developed in your advisory practice.

Advisory Panel – Powerhouse Firm Manager's Panel

DAY TWO

Keynote – Rick Sager, CPA | Sager CPAs

Session D

This session will enable you to more effectively select and onboard clients that "fit" your firm's vision.

- Define, redefine, or expand "who you are and what you do" with your advisory services.
- Identify characteristics of various potential clients who fit your ideal client persona.

Session E

This session will provide insight and perspective on how Practice Forward advisors were able to evolve into a business community thought leader.

- You will hear how these advisors made their connections and became centers of influence in their community and the accounting profession.
- Discussions will include how they engage prospective clients and current clients via Podcasts, Webinars, State Society of CPAs, and other industry engagements.

Roundtable Event

Advisory Panel – Firm Leaders Panel

DAY THREE

Session F

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- Managing your firm's resources, including remote staff and outsourced staff.
- Practice management and technology security best practices.

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