

2017 Small Firm: Big Business Conference Agenda

August 17, 2017
Indianapolis Marriott East

7:30-8:20 a.m. Presenter Sponsor presentation - *optional extra hour of CPE
(Look for your RSVP email closer to the conference date)

[Grabovsky & Associates](#)

Learn actionable strategies and product solutions that support the short- and long-term planning needs of each tier of the *Confident Retirement* approach: Covering the Essentials, Ensuring Lifestyles, Preparing for the Unexpected and Leaving a legacy.

8:30-9:20 a.m. General Session
PCPS Tools and Resources to Solve your Top Issues

[Lisa Simpson, CPA, CGMA - AICPA](#)

A review of practice management concerns identified by sole practitioners and small firms in the 2017 AICPA PCPS CPA Firm Top Issues Survey, as well as the resources available to help with those issues and ways to make the most of PCPS membership.

9:20-9:35 a.m. Networking Break

9:35-10:50 a.m. Breakout Sessions

A. Small Firm Strategies for Attracting and Retaining Talent

[Lisa Simpson, CPA, CGMA - AICPA](#)

So you don't have a ping pong table in the office or unlimited PTO to offer employees? You can still compete as a small firm in the competitive market for talent. Find out tactics small firms across the country are using successfully to attract and retain staff.

B. Bring Efficiency Back to Your Day with Microsoft Outlook

[Steven Phelan, CPA, CITP - K2 Enterprises](#)

Microsoft Outlook is one of the most utilized business applications in the world today and, for many users, adds frustration to their day. This session is designed to help Outlook users better organize and manage their communications and contacts. It contains coverage on how to reduce email interruptions, triage the inbox rapidly, find related messages quickly and easily, organize the inbox with folders, categories, and rules, and use drag-and-drop to create new tasks and appointments.

C. Interactive Discussion: Work Flow Management – Drinking from a fire hose or squeezing water from a rock?

[Richard Wheeler, CPA - Wheeler & Associates, PC](#)

This is an open, moderated discussion on what practitioners are doing including the good, the bad and the ugly. Bring your thoughts and a willingness to share!

10:50-11 a.m. Networking Break

11 a.m.-12:15 p.m. General Session Tech Tools and Gadgets for Small Firms

[Steve Phelan, CPA, CITP - K2 Enterprises](#)

Included in this session are demonstrations of leading tools, techniques, gadgets and apps designed to assist you in becoming more efficient and effective with technology.

12:15-1 p.m. - Lunch and Networking

1 p.m.-2:05 p.m. Breakout Sessions

A. The Digital Marketing Revolution for Small Business: How Local CPAs Can Beat Out the Larger Competition

[Nick Jaworski - Circle Social, Inc.](#)

Digital marketing has completely revolutionized how marketing works. No longer dependent on huge budgets and with the ability to engage local audiences in a highly targeted and cost-effective manner, digital marketing is the go-to for most small firms. The great part is that larger organizations still haven't caught on to the shift, which means there is a lot of opportunity for small firms to take advantage of the gap. This workshop will discuss the strategy needed to do this effectively and provide some step-by-step examples of how to use a small firm's most powerful asset - Facebook - to get more leads and clients.

B. Identifying, Preserving and Transferring Practice Value

[Larry Metzging, CPA - Indiana Business Advisors](#)

[Edwin Mysogland, CEPA, CMEA, CVA, SBA - Indiana Business Advisors](#)

All firms are not created equal, and understanding what makes your practice valuable to successors or third parties and how to transfer it is integral to maximize value. This session is not a sales pitch on why now is a great time to sell, but rather what you can do today to understand your value and how it gets effectively transferred when you determine the right time. In this session we will explore market multiples, key operational metrics, the service composition of the practice and how it adds to or deducts from value, and most importantly, how to maximize your strengths and minimize your weaknesses when you do decide to enter the market. We then turn attention to the sale process from launch of confidential marketing efforts to closing and post-closing matters.

C. Interactive Discussion: How to Use Technology to Make a Big Firm Impression with Small Firm Charm

[Mary Kay Prasco, CPA, CFF - Prasco & Associates, PC](#)

This interactive discussion will touch on some easy to implement technologies that can make your firm more appealing for staff and clients. Highlights include best practices with: remote offices (working in the cloud), client portals and more Voice over Internet Protocol (VoIP phone systems)

2:05-2:20 p.m. Networking Break

2:20-3:30 p.m. Breakout Sessions

A. Growing with Your Current Clients – It’s Easier Than You Think!

[Shad Tidler - Lushin](#)

Are you worried because you are losing your current clients to competitors even after years of helping them? Are you concerned you may be missing opportunities to help your current clients in additional ways? Do you feel like you don't know how to start the conversation with current clients on other services and products you can offer to help them? Are you confused on the best ways to ask for referrals with your current clients?

In this interactive session, discover the challenges small firms face when it comes to retaining and growing with our current clients, why these challenges come up, and strategies we can begin implementing to fix them.

B. Ethical Responsibilities and Liabilities of Transferring Clients (Ethics)

[William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS - Mallor Grodner, LLP](#)

When there is a change in the CPA firm structure, there are ethical considerations to be aware of transferring client records. Very simply put, did you know that *any confidential client information* shall not be disclosed without the client first providing their “*unequivocal consent*”? It may seem basic, but this is a step often overlooked when a change in ownership occurs within firms. Join this session and learn the steps to follow if you plan on discontinuing your practice, what factors to consider if your practice is acquired and lastly learn more about the specific ethical procedures you are required to follow in either of these cases.

C. Interactive Discussion: Ultra Tax User Group

[Kathryn Stephens, CPA - Wheeler & Associates, PC](#)

Do you use Ultra Tax? Has it made your work life so much easier? Come ready to share your favorite features and “a-ha” moments with the software! Even if you use the software but just aren't sold yet, bring your questions because this is your chance to ask other small firm CPAs how to implement some best practices that could save you time and improve your efficiency.

3:30-3:40 p.m. Networking Break

3:40-4:45 p.m. General Session

Rules vs. Principles – Ethics in a “New Normal” World (Ethics)

[Karl Ahlrichs, SPHR, SHRM-SCP - Gregory & Appel Insurance](#)

Properly applying ethics is an art, and we need to understand how to use all the tools in the toolbox. Are rules more important than principles? Are there times we can deviate from GAAP and remain ethical? In this fast-paced presentation, we will cover the history of our challenge, examine how ethics and integrity are eroding, and how to hold the moral and ethical high ground as you conduct business in a world of shifting standards. This will be both a facilitated discussion and a lecture.

