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# Agenda

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**8:30 AM – 8:35 AM**

**Welcome & Announcements**

**8:35 AM – 9:25 AM**

**The Trust Edge: How Top Leaders and Organizations Drive Business Results Through Trust**

Trust is a fundamental, bottom-line issue. Without it, leaders lose teams, salespeople lose sales, and organizations lose reputation, retention of good people, relationships, and revenue. But with trust, individuals and organizations enjoy greater creativity, productivity, freedom and results. Through David's industry leading research, The Trust Outlook™ and firsthand experience working with the world's highest performing organizations, David reveals how top leaders and organizations drive business results to become the most trusted in their industry.

**David Horsager** – CEO, Trust Edge Leadership Institute, Saint Paul, MN

**Credits: 1.0 OT**

[LAUNCH](#)

**9:25 AM – 10:15 AM**

**Who is Going to Do All This Work?**

There is lots of work and less people how is it all going to get done. Employers (hopefully) understand that six key motivators impact employee recruitment and retention. This presentation highlights why top talent stays at an organization and will discuss low-cost, medium-cost, and long-term recruitment and retention strategies. Although some strategies can be organization wide, some can be implemented even at a team level. Come hear and share how you can have a positive impact on retention in your organization!

**Jacquelyn H. Tracy, CPA** – Partner, Mandel & Tracy, LLC, Providence, RI

**Credits: 1.0 OT**

LAUNCH

**10:30 AM – 11:20 AM**

**What it Takes to Keep Your Team’s “A” Players**

Human Resources is usually a boring, touchy-feely area. Not today! Data can show us how engagement scores, salary increases, time with the manager, and many other factors will impact future profitability. Did you know that if your employees are in the top quartile of engagement scores – your turnover can go down 59% and your profitability up 20%? Using principles from Jim Clifton and Patrick Lencioni – this session allows you to understand why we spend time and money on HR and what the ROI should be.

**Cindi Filer** – CEO, Innovative Outsourcing, Marietta, GA

**Credits: 1.0 OT**

LAUNCH

**11:20 AM – 12:10 PM**

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**12:10 PM – 1:00 PM**

**Diversity, Equity & Inclusion Now**

A major change in the past year has been the push to prioritize Diversity, Equity and Inclusion (DEI) in our workplaces. How can organizations change to address issues, avoiding a culture of ‘niceness’, exploring diverse identities and identity impacts? Let’s discuss together.

**Lynita Taylor, MBA, Ed.D** – Diversity & Inclusion Program Manager, Mike Illitch School of Business, Wayne State University, Detroit

**Credits: 1.0 OT**

LAUNCH

**1:00 PM – 1:50 PM**

**Fraud: A Never-ending Story**

They say only two things in life are certain, death and taxes. However, maybe we need to add fraud to that list. Fraudsters always seem to be two-steps ahead of the latest fraud prevention techniques. Join in for this informative session on fraud and forensic accounting for the latest information on this saga.

**Marlene J. Beach, CPA, CFE, CVA** – Principal, UHY LLP, Farmington Hills

**Chris Peterson, CPA, CFE** – Principal, UHY LLP, Farmington Hills

**Credits: 1.0 AA**

LAUNCH

**2:05 PM – 2:55 PM**

**Making Your Organization “Unquittable”**

What if you didn’t fear the great resignation/war for talent because your organization was already known as a destination employer? If this isn’t your current reality, let’s talk about how we can get you there by discussing today’s talent market, critical strategies employed by organizations winning the war for talent and next steps for making changes.

**Jim Bitterle, BBA, MBA** – Managing Partner, EDSI Consulting, Dearborn

**Credits: 1.0 OT**

LAUNCH

**2:55 PM – 3:45 PM**

**How to Expand Your Practice with an Exceptional Client Experience**

These days, it’s not just good enough to provide great service – prospects and clients expect the same online experience from you as they see from big brands like Amazon. CPA firms who don’t take advantage of the latest technology will fall behind the competition. From your website to your client portal to your initial discovery calls, every touchpoint counts. Learn more about exceeding expectations in your client experience in this session.

**Lee Reams II** – Founder and CEO, ClientWhys, Inc., Newport Beach, CA

**Credits: 1.0 OT**

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