

GGI BEST PRACTICES & DEVELOPING LEADERS CONFERENCE
21-23 SEPTEMBER 2017
PITTSBURGH, PA, USA



Hosted by:

cohen&grigsby[®]



GROSSMAN YANAK & FORD LLP
Certified Public Accountants and Consultants

Omni William Penn Hotel
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Pittsburgh, PA 15219, USA

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Dress Code: Business Casual unless otherwise stated.

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DELEGATE PROGRAM

****This is only a draft. GGI reserves the right to change the times and any part of the program at any time.***

Thursday, 21 September 2017

- 13:30 – 19:30 GGI Hospitality Desk Open in the hotel
- 14:00 – 17:30 Practice Group Meeting at the offices of Grossman Yanak & Ford
Three Gateway Center, Suite 1800, Pittsburgh, PA 15222
- Auditing, Reporting & Compliance Jeffrey A. Ford
- This session will include presentations by Thompson Reuters outlining (1) current audit workflow and technology tools, and (2) the evolution of auditing and the impact of artificial intelligence in coming years. Chad Porter will also provide an excellent overview of a fraud case. Last, we will have updates regarding new GGI relationships with the AICPA and others.*
- 18:00 – 19:00 Welcome Reception at the offices of Cohen & Grigsby
625 Liberty Avenue, Pittsburgh, PA 15222-3152
- 19:00 – 23:00 **Welcome Cocktail Reception & Welcome Dinner in the Hotel**
- Presidential Welcome Claudio G. Cocca
- Introduction of GGI New Members & Candidate Firms Adam Crowson

Friday, 22 September 2017

- 08:45 – 17:30 GGI Hospitality Desk Open in the hotel
- 09:00 – 17:30 **Conference in the hotel**
- 09:00 – 09:15 **Best Practices & Developing Leaders**
- Official Conference Opening Adam Crowson
- Welcome by our Host Firms Cohen & Grigsby
Grossman Yanak & Ford

09:15 – 10:45

Best Practices & Developing Leaders

“Powerful, Persuasive Communications” Part I Dr Barbara Tannenbaum

Every interaction we have with clients, colleagues and opposing counsel demands effective communication. When you maximize the impact of every interaction, you will maximize the value of the outcomes you achieve. This session will provide you practical knowledge about audience-centered communication, both verbal and non-verbal.

10:45 – 11:15

Coffee Break

11:15 – 12:30

Best Practices

“The Effects of Participating in an International Staff Exchange” Glenn Miller

Finding and keeping quality staff will continue to be a major challenge for our firms. We need to differentiate our practices to attract and retain top quality talent. In this session we will discuss international staff exchanges and how they can help you differentiate your firm to retain current staff and attract future leaders. In addition, we will discuss how a well-planned exchange program can help your firm develop relationships and specializations that can lead to new business opportunities to grow your practice.

Developing Leaders

Leadership vs Management and Team Building Chris Medlin

Leadership is a desirable attribute in the Military. Management skills are desirable in Corporate America. Is the difference between each just a matter of semantics and could they be used synonymously?

The critical phase for a leader is in the ability to “assess” the environment around them. This is normally broken down into five key components: Observe, Assess, Decide, Communicate, and then Re-assess. Whether engaged in combat operations or attempting to influence corporate process, all leaders must be able to self-evaluate and determine if their actions are achieving the desired results.

12:30 – 14:00

Lunch

13:30 – 17:00

Developing Leaders

GoRuck Team Exercise Chris Medlin
(Dress Code: Exercise Attire)

The group will be led from start to finish by Mr Chris Medlin, a Special Operations Cadre, whose job is to build a team by pushing you to overcome, together. You stay with your group the entire time aka a true team event, never in any way confused with a road race or a mud run. And no, your Cadre is not a drill sergeant and no, this is not boot camp. That stuff belongs to the military; this is simply an event about your team.

14:00 – 15:30

Best Practices

“Moving Beyond the Billable Hour” Dennis L. Nerland & Robert Thompson

Where is the place of “The Billable Hour” in the firm of the future? The challenge is not that value can be achieved, but rather the mindset and behaviors of the practitioners who have long been taught that selling time is the sole way of capturing value.

Dennis L. Nerland and Robert Thompson will be presenting how this paradigm can be broken down and re-structured to reveal where the true value resides within a PSF, how it aligns with a client’s interests, and how profits can be also enhanced to the betterment of both.

15:30 – 16:00

Coffee Break

16:00 – 17:30

Best Practices

16:00 – 16:30

Review Benchmarking Data Timothy C. Lynch & Brian Marita

16:30 – 17:30

Management by Objective (MBO) Timothy C. Lynch & Brian Marita

Accounting and law firm leaders will discuss their varied approaches to managing by objective and the role that planning, key performance indicators, and benchmarks play into their management approach.

18:30

Transfer to Dinner Location
Meeting Point: Hotel Lobby

18:45 – 22:00

Host Firms’ Dinner at Phipps Conservatory and Botanical Gardens
1 Schenley Drive, Pittsburgh, PA 15213

Saturday, 23 September 2017

Check out no later than 12:00 noon.

08:45 – 12:00

GGI Hospitality Desk Open in the hotel

09:00 – 12:00

Conference in the hotel

09:00 – 10:30

Best Practices & Developing Leaders

“Ground Truths of Leadership” Chris Medlin

This session will provide an overview of how military leaders within Special Operations communicate and utilize collaborative planning to maximize the human capital potential within their organizations to yield strategic results in fluid environments. We will explore several of these techniques and show how their applicability is relevant within your firms.

10:30 – 11:00

Coffee Break

11:00 – 12:00

Best Practices & Developing Leaders

“Powerful, Persuasive Communications” Part II Dr Barbara Tannenbaum

Communications involve both content and delivery. Structuring both to maximize your persuasion will further improve your results. This session will introduce elements of persuasive theory in ways you can apply them immediately.

End of Conference

SPEAKERS

Dr Barbara Tannenbaum

Dr Tannenbaum is president of Dynamic Communication, LLC and a faculty member at Brown University. She has extensive experience helping clients develop and deliver persuasive messages. Dynamic Communication has been delivering communications programs to professionals for over twenty years.

Legal professionals in particular benefit in tangible and material ways when they communicate effectively. Barbara's work in the legal sector includes seminars for partners, associates and staff, along with one-on-one coaching of senior lawyers at top law firms. Her series of workshops for the Chief Judges Council earned election to their speakers' hall of fame.

Hundreds of executives in the global commercial sector have improved the power of their persuasion in Dynamic Communication programs. Clients include Blackstone, Franklin Templeton, First Republic, Morgan Stanley, Merrill Lynch, Intel, IBM, BuzzFeed, Wragge & Co. (England), Chanel (France), CVS, Microsoft (USA, Mexico, Canada, Brazil), Google (USA, Ireland, Singapore, France), and Reliance Industries (India).

Her work in the non-profit sector includes trainings for the International Monetary Fund, the American Association of Museum Curators, The Center for Curatorial Leadership, The Metropolitan Museum of Art, The Museum of Modern Art, Museum of Fine Art – Boston, Rhode Island School of Design, Institute of Contemporary Art, Philadelphia, Princeton University, Wellesley College, and Barnard College.

Dr Tannenbaum has been awarded many professional and academic honors, including Business & Professional Women's Businesswoman of the Year and numerous outstanding professor-of-the-year awards at Brown University.

Barbara earned her doctorate in communication studies with a minor in social psychology at the University of Massachusetts, Amherst. Her research interests include gender and communication and how power is achieved via persuasion.



Chris Medlin



Mr Medlin graduated from the University of Florida with a Bachelor of Arts degree in Criminal Justice in May of 1991. After commissioning as a 2ndLt, he attended The Basic School (TBS) and the Infantry Officers' Course (IOC). Upon graduation, he reported to 1st Battalion, 6th Marines at Camp Lejeune, North Carolina, in February 1992.

Mr Medlin served in the following billets throughout his 26-year military career:

Rifle Platoon Commander, Alpha Company 1st Battalion, 6th Marines (1992 – 1993)
Recon Platoon Commander, 2d Reconnaissance Battalion (1993 – 1995)
Recon Platoon Commander, 3rd Force Reconnaissance, MARFORRES (1996 – 1998)
MARFOR LNO / J-3E, Special Operations Command, Central (1998)
Assistant Operations Officer, 1st Battalion, 2nd Marines (1999)
Company Commander, Charlie Company, 1st Battalion, 2nd Marines (1999 – 2000)

UNITAS Rifle Company Commander, Charlie Company, 1st Battalion, 2nd Marines (2000)
Company Commander, Headquarters Company, 2d Marines (2000)
Operations Officer, 2d Reconnaissance Battalion (2001 – 2002)
Officer in Charge, Amphibious Reconnaissance School (2002-2005)
Executive Officer, 3d Reconnaissance Battalion (2005 -2007)
Branch Head, Special Missions, III SOTG (2007-2008)
Commanding Officer, Small Boat Training Det, Training Command (2008-2009)
Executive Officer, Special Operations Task Force (SOTF) 81, MARSOC (2009-2010)
Executive Officer, 3d Marine Special Operations Battalion, MARSOC (2010-2011)
Operations Officer, G7 (Exercise Control Group), MARSOC (2011 – 2012)
Operations Officer, Marine Special Operations School (MSOS), MARSOC (2012-2013)
Battalion Commander, 1st Battalion, 3d Marines (2013-2015)
Exercise Officer, G7 (Exercise Control Group), MARSOC (2015 – 2017)

Mr Medlin possesses the following Military Occupational Specialties:

Special Operations Officer (0370)
Expeditionary Ground Reconnaissance Officer (0307)
Infantry Officer (0302)
Military Freefall Parachutists/Combatant Diver (8026)

Since retiring from Active Duty on July 1st, Mr Medlin began working for GORUCK Events as a Special Operations Cadre.