

BKR LEADERSHIP INSTITUTE

2016 - 2017

Objectives of Program:

- Advance your career and your leadership skills
- Achieve work/life success
- Improve quality of client service
- Retain your best people
- Increase your effectiveness

This BKR Leadership Institute has been customized for BKR member firms and the unique needs of participants.

All sessions will be highly interactive with significant attendee participation and opportunities to share information and ideas.

BKR
INTERNATIONAL

*Bringing the World to Our Members and Their
Clients*

SESSION 1 (ST. LOUIS): AUGUST 3-5, 2016

DAY 1

The 7 Habits of Highly Effective Managers

When you participate in The 7 Habits of Highly Effective Managers, you will discover the same transforming principles that have led the world's foremost business leaders to their professional and personal success.

You, too, can become a more influential leader, and you can empower team members to make their highest and best contribution by learning and applying processes and tools in each of the habits:

Habit 1: Be Proactive. Recognize how choices based on personal experience or beliefs can profoundly impact your effectiveness both positively and negatively. Identify hidden resources and use them to break through barriers and achieve the results you want.

Habit 2: Begin with the End in Mind. Develop a clear definition of what is and is not important to you and your firm. Shape your own future instead of leaving it to the outside influences of other people or circumstances. Make your own unique contribution.

Habit 3: Put First Things First. Gain a reputation for excellent follow-through and superior organizational skills by greatly increasing your ability to focus on your top priorities. Recognize that effectiveness requires the willingness to eliminate the unimportant.

Evening: Welcome Dinner TBD

DAY 2

The 7 Habits of Highly Effective Managers (Continued from Day 1)

Habit 4: Think Win-Win. Build a team that finds faster and better solutions through clear expectations, shared responsibilities, and an understanding of priorities. Easily share recognition and success without fear of diminished personal importance.

Habit 5: Seek First to Understand, Then to Be Understood. Develop the ability to deeply understand any problem and give honest, accurate feedback that develops trust. Learn to listen for clarity while eliminating prejudices and the desire to prescribe.

Habit 6: Synergize. Value and celebrate differences and understand how they contribute to innovative and better solutions. Maximize opinions, perspectives, and backgrounds instead of feeling threatened by them.

Habit 7: Sharpen the Saw. Maintain and increase your newfound effectiveness by continually renewing yourself physically, mentally, socially, emotionally, and spiritually. Learn how to unleash the talent of colleagues and team members.

DAY 3

Communication Advantage

Your written and oral communications must make your point with power and clarity.

Whether you're deepening client relationships, engaging in business development, or simply delivering firm updates, people must be motivated to read or listen to your message.

Clear and concise messages are a business necessity, and designing and delivering them is a core organizational skill. Objectives of this session include:

- Organizing initial ideas around a clear purpose
- Structuring messages based on solid writing and presentation standards
- Evolving from planning and design to drafts
- Reviewing and refining the draft against formal standards



2015 Leadership Institute, Session 1 – St. Louis

SESSION 2 (CHICAGO): NOVEMBER 2-4, 2016

DAY 1

Wrap-Up of Communication Advantage/ Attendee Presentations

YOU are the star at this session!

Between sessions 1 and 2, you will be asked to plan, design, and develop a presentation on a pre-determined topic.

Your fellow participants will provide helpful feedback as to its power, clarity, and impact.

This session will wrap up with instructor recommendations on how to reduce the time spent crafting and delivering messages – whether written or oral – and improve your results every time.

DAY 2

The Business of Accounting/ The Dynamics of Profitability/ Billing and Collecting

This session will explore the internal issues of managing an accounting firm, emphasizing the strategies, systems, and processes that will help you lead your firm in any economy. Specific topics include:

- How to build value in an accounting firm
- Billing and collections
- Profitability formula
 - Billing rates
 - Realization
 - Utilization
 - Margin
 - Leverage
- How to increase billing rates, realization, utilization, and margin
- Enhanced fee realization techniques
- Billing and collecting
- Value billing techniques

Specific topics include:

- The people crisis in a rebounding economy; costs of turnover
- HR trends in public accounting
- Working with multi-generational teams and bridging the generation gap
- Meeting deadlines while balancing work/life issues
- Changing your management style to build trust
- Communicating as a leader
- Evaluations and giving feedback
- Resource management and budgeting
- The responsibility of being a true professional
 - Accountability
 - Responsibility
 - Performance

DAY 3

How to Increase Your Leadership and Manage- ment Effectiveness

Finding, training, and keeping good people have once again become major challenges in accounting firms.

This session tackles the “real world” issues of leading and managing your people, and will provide you with a solid foundation for future leadership roles.

This session will conclude with individual goal setting.



2014 Leadership Institute Graduate Reunion – Chicago

SESSION 3 (HOUSTON): JANUARY 11-13, 2017

DAY 1

Executive Presence, Managing Client Expectations, Creating a Marketing Culture

In today's economy, leaders must go above and beyond simply doing good work. They understand their clients' industries and businesses, anticipate their needs, and listen more than talk. They also develop solid business development plans that include everyone in the firm, and they are passionate about providing extraordinary service. Objectives include becoming a more valued member of your firm and a trusted advisor to your clients.

Specific topics include:

- Increasing your executive presence
- Creating effective proposals
- Developing effective client service strategies
- Engaging your team in cross-selling opportunities
- Refining your systems and processes
- Leveraging for profitability

DAY 2

Marketing and Business Development Strategies to Expand Your Professional Network

In most firms, over 80% of new client referrals come from existing clients. In this session, you will learn how to identify opportunities with existing clients, build referral and professional networks, and utilize the "pipeline management" technique to get the clients you want.

DAY 3 (Half Day)

Review of All Session Topics, Wrap-Up, and Personal Goal Setting

Your last session before busy season will wrap up with a review of the previous session topics, and how you will apply the principles, processes, and tools you have learned to set your personal and professional goals. You will also complete a personal business development action plan.



BKR's 2012 Leadership Institute Graduates - New York

SESSION 4 (NEW YORK): MAY 3-5, 2017

DAY 1

Morning

During the morning session, you will analyze the successes and accomplishments you achieved during the past busy season, as well as any behavioral changes in you and/or your team and the impact they made. You will also share remaining challenges and solve them based on the input of the instructor and your colleagues. You will leave with an action plan to insure optimum success going forward.

Afternoon:

The Four Disciplines of Execution

- Inspire and engage team members in the process of identifying team goals
- Distinguish wildly important goals from the merely important ones
- Determine the most leveraged behaviors and small outcomes that will help you accomplish your wildly important goals
- Create compelling team scoreboards that will let you know immediately if the team is winning or losing
- “Clear the path” so you and your teammates can

succeed

- Realize your role in helping others keep their commitments

DAY 2

Continuation of The Four Disciplines, Prepare for Graduation Dinner Exercise, and Wrap-Up

Evening

Your graduation dinner will be held tonight, where you'll celebrate your success in grand style!

DAY 3 (Half Day)

This morning, you'll learn about new trends in social media and how to integrate online tools

with traditional lead-nurturing strategies, such as direct mail, lunches, networking, etc. You'll learn how to use social media to achieve your personal and professional goals, and commit to applying what you have learned to help others reach their full potential.

You have now grown measurably as a leader! You think more strategically, have longer-term vision, better understand the business of the firm, and know how to inspire your people and unleash their greatest talents.

CONGRATULATIONS!



BKR's 2010 Leadership Institute Graduates – Chicago