

# Going for the Gold: A Focus on Growth

## RSM McGladrey Network Leadership Forum

Wednesday, June 9 – Friday, June 11, 2010  
Orlando World Center Marriott

[www.regonline.com/networkleadershipforum2010](http://www.regonline.com/networkleadershipforum2010)



**RSM! McGladrey Network**

In 1980, the U.S.A. Olympic hockey team achieved what many have called a miracle by defeating the seemingly unbeatable Soviet team and going on to win the gold medal. Their epic win has gone down in history as one of the most indelible moments in all of U.S. sports and has been a source of inspiration to a nation.

In today's challenging business environment, it may seem like we are facing insurmountable obstacles to growth. We've had to shift our focus somewhat from increasing business to retaining business and minimizing loss. Now is the time for your team to refocus, target that competitor to growth and go for the gold.

At the 2010 RSM McGladrey Network Leadership Forum, get your firm's entire leadership team "going for the gold" with two days focused on strategies to grow your business and achieve your full economic potential.

Building upon the success of last year's conference, all specialty roundtable groups are again invited to the Network Leadership Forum. This includes A&A, COO, HR/ Firm Administrator, IT, Managing Partner, Tax, and new this year - Marketing and a General Partner Roundtable. Your team will receive a consistent message with our high-impact general session content and keynote speakers, and there will be plenty of valuable networking time to connect with service providers, Network colleagues and the Network team. Time will also be available to meet as a firm before leaving the conference to discuss learnings and pinpoint key takeaways for implementation. You'll leave the conference feeling prepared to reignite your firm's growth armed with the latest industry and technical knowledge, ideas and tools.

Join us and let the Network team help you win that gold medal of growth!

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## Agenda

### Wednesday, June 9

6 – 9 p.m.

Welcome Reception and Service Fair

### Thursday, June 10

7 – 8 a.m.

Breakfast and Service Fair

8 – 10:15 a.m.

General Session – Jason Jennings keynote

10:15 – 10:45 a.m.

Break and Service Fair

10:45 a.m. – 12 p.m.

Functional Roundtable Sessions

12 – 1 p.m.

Lunch and Service Fair

1 – 5 p.m.

Functional Roundtable Sessions with Break and Service Fair

7 – 10 p.m.

Dinner

### Friday, June 11

7 – 8 a.m.

Breakfast

8 a.m. – 12:30 p.m.

Functional Roundtable Sessions with Break

12:30 – 2:30 p.m.

Lunch and General Session – Jim Craig keynote

2:30 – 4:00 p.m.

Optional Individual Firm Meetings

We are also launching Network Partner Development Program (PDP) '12 Monday through Wednesday, Executive Leadership Development 4 Tuesday through Wednesday, and a new program, Career Advisor as Coach Facilitator Training, during the Network Leadership Forum. See page 6 for details.

## Jason Jennings

*USA Today* calls *New York Times* bestselling author Jason Jennings one of the three most in-demand business and leadership speakers in the world, but Jennings says that he's simply a researcher and storyteller who thrills at taking the complex and complicated and making it easy to understand and immediately actionable. Jennings and his research teams have studied more than 120,000 companies for his bestselling books and identified the five traits shared in common by the world's fastest, most productive and best growth organizations.



During his keynote address you'll learn:

- A simple, no-cost strategy that can become your firm's biggest competitive advantage
- Four things you need to let go of in order to grow and achieve your full economic potential
- How to get everyone in your firm on board the strategy for growth and profits
- How to get everyone thinking and acting like an owner

Attend this keynote presentation and you'll understand why Howard Stringer, chairman and CEO of Sony, calls Jennings, "the best business and leadership speaker I've ever heard," and why Jason Dizzine, director of Ricoh-Savin, summed up Jennings 2009 keynote by saying, "Jason connected with everyone from the moment he set foot on stage," adding, "thank him for the best keynote speech we've ever had at a national dealer meeting."

Jason's books include *It's Not the Big That Eat the Small...It's the Fast That Eat the Slow* focused on speed, *Less Is More* focused on productivity, *Think BIG, Act Small* focused on growing revenues, and his latest book is *Hit The Ground Running, A Manual for New Leaders*.

## Jim Craig

Jim Craig has been called the backbone of a team that accomplished one of the most extraordinary and memorable sports victories of all time. As goalie for the 1980 U.S. Olympic hockey team, Jim's extraordinary performance helped the team achieve what many have called a miracle by defeating the seemingly unbeatable Soviet team and going on to win the gold medal. After being part of this "Miracle on Ice" team that has been widely cited and referenced as the consummate example of a highly-functioning and efficient group, Craig went on to play hockey professionally and then transitioned to tremendous and ongoing success in the business world.

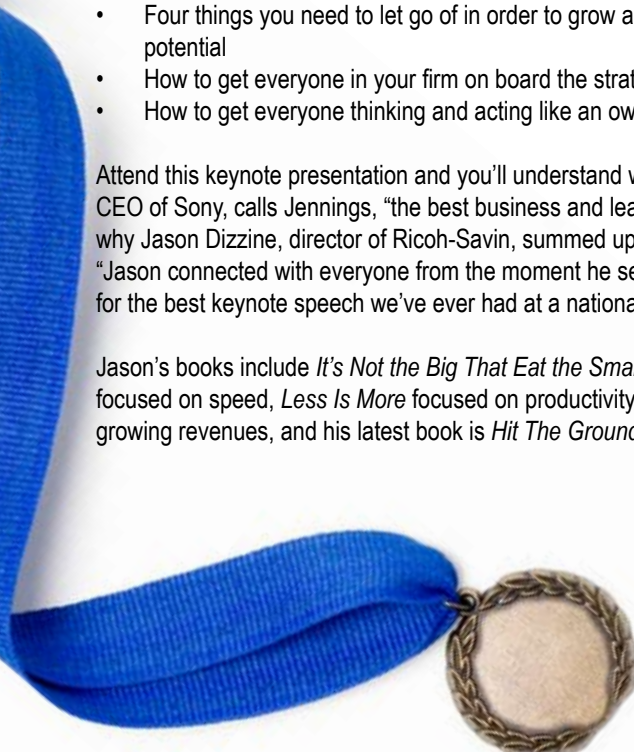


Founder and president of Gold Medal Strategies, Jim is in demand coast-to-coast and internationally as a motivational speaker, spokesperson, marketing and sales strategist and teamwork coach. Over the past 25 years, Jim has inspired, instructed and provided strategic and winning direction for employees and associates from more than 300 organizations.

During his keynote you'll learn:

- What makes a truly great team
- What to look for in recruiting your "gold medal" team
- How to apply the lessons of great teams to win in business
- Effective ways to rebound from setback and defeat, and channel disappointment into positive energy
- How to get out of your comfort zone, stay young in spirit and outlook and make your own bit of history

In a letter to Craig, Jeff Irmer, a Honeywell divisional vice president, wrote, "It's been a few weeks since your keynote address and the positive comments just keep coming! We could not have asked for a better presentation to conclude our meeting and drive home vital lessons about working together as a team."



## A&A Practice Leaders

In keeping with intent of the A&A Leader Roundtable, this meeting will focus on addressing issues deemed important by the participants. Based on feedback from the January A&A Roundtable, this meeting will utilize an "open forum" format and will keep presentations on technical topics to a minimum. In order for facilitators and participants alike to prepare, everyone registered will receive a survey requesting their input on important topics they would like on the agenda. Topics will be shared with all A&A leaders prior to the Network Leadership Forum.

If you haven't attended an A&A Leader Roundtable previously, there is no better opportunity to discuss issues, strategies, opportunities, challenges and best practices with your peers. In addition to Network A&A leaders, there will be a representative from the National Professional Services Group (formerly the National Office of Audit and Accounting) in attendance.

## Chief Operating Officers

Join your peers leading their firm's operations at the second COO Roundtable. Based on feedback from last year's meeting, this year we will focus more in depth on the following:

- Best practices each of you bring to the table
- How to quickly build consensus among respective stakeholders
- Financial statistics survey results review and discussion
- Diving deeper into your operations

Expect to go home with solid tools and ideas to make a positive impact in your firm. We will reach out to each participant signed up for this session prior to the event to gather roundtable topics you would like to discuss among your peers. Register today to collaborate and leverage knowledge with other successful firm leaders.

## Human Resource Leaders and Firm Administrators

HR leaders are critical players in their firms' success and will again join other firm leaders at this year's Network Leadership Forum. As in past years, Network HR directors provided input on topics to best address important human resources issues.

Topics on the agenda will include: human resources opportunities and challenges in 2010, decisive dialogue, understanding character-based leadership, pay-for-performance and incentive compensation, best practices sharing – recognition & rewards that win big but cost little or nothing, 2010 benefits and HR practices survey results, and possibly an employment law update.

We believe every Network member will benefit from being represented at this meeting. In addition to high-quality topics and speakers, participants gain great value from networking with professionals in other firms with similar roles. HRCI credit will also be offered for this program.

## General Partners/Leaders

We are proud to introduce the General Partner Leadership Roundtable designed for all partners and leaders within your organization that would like to participate in the Leadership Forum but do not currently hold a firm leadership position such as A&A, COO, tax, IT or managing partner, nor would typically participate in our various roundtable meetings.

This interactive session will create an opportunity for partners and leaders to hear and share ideas focused on various leadership and practice management issues facing the accounting industry today. We will focus on topical categories such as enhancing overall client service and loyalty, growth initiatives, people development and your role as a leader in your organization. In order to ensure value for all participants attending this roundtable, we will not focus on specific industry or functional expertise, although examples may be shared that are applicable to these types of areas throughout the session.

A survey will be sent to registrants in late April soliciting feedback on specific agenda items. If you would like to have influence over the specific topics, please register early. With your help we hope to put together a valuable session that meets your broader needs as a leader and partner within your firm. We are excited to offer an opportunity for general partners and leaders to again participate and share in the value of the Network Leadership Forum.

## Managing Partners

Again this year during the Network Leadership Forum, managing partners will break into regional Net Groups to discuss best practices and other issues deemed important by the participants. Prior to the meeting, everyone registered will receive a survey requesting their input on important topics that they would like on the agenda. Potential topics include:

- Growth initiatives
- Audit and tax efficiencies
- Mergers & acquisitions
- Leadership development techniques and training
- Partner comp in a time of decreasing total partner comp pool
- Hiring and managing people in a flat environment

The 2010 financial statistics survey data will be distributed and as usual a portion of our discussion will be focused on discussing and comparing key firm statistics to determine firm opportunities and best practices. We will be holding two webcasts prior to the Network Leadership Forum to provide all managing partners and others that you may like to invite with a presentation and discussion of the overall trends and results. You will have your individual results prior to those webcasts.

We look forward to the engaging discussions that will take place concerning the issues most important to you and your firms.

## Marketing Leaders

We are excited to offer a new session this year for marketing and business development directors. This interactive session will create an opportunity for marketing professionals and business development directors to hear and share ideas focused on the issues they face every day. The goal of the Marketing Roundtable is to leverage group knowledge and build on-going relationships that will help grow and improve marketing and sales at your firm.

As with the other roundtable meeting formats, we will create an agenda using input gathered from you prior to the meeting and we will spend the majority of our time discussing and sharing best practices and other topics based on that input. We are pleased to offer an opportunity for business development and marketing professionals to join us and share in the value of the Network Leadership Forum.

## Tax Practice Leaders

The Tax Leader Roundtable will focus on addressing issues deemed important by the participants, will utilize an “open forum” format and will keep presentations on technical topics to a minimum. In order for facilitators and participants alike to prepare, everyone registered will receive a survey requesting their input on important topics they would like on the agenda. Topics will be shared with all tax leaders prior to the Network Leadership Forum.

If you haven't attended a Tax Leader Roundtable previously, this is a great opportunity to get involved. Tax leaders that have participated in past roundtables have indicated that if there is a Network meeting they don't want to miss, this is it! There is no better opportunity to discuss issues, strategies, opportunities, challenges and best practices with your peers. In addition to Network tax leaders, there will be a representative from the National Tax Group in attendance.

## Technology Leaders

The Technology Leader Roundtable will provide you with the insights and opportunities to insure your firm is poised to “go for the gold.” The theme and focus of the Network Leadership Forum this year is growth, and technology is a vital component of any firm initiative. As the technology leader, you'll want to understand the growth strategies and ensure the technology projects in place can help drive that growth.

Our roundtable session will focus on two subjects: technology leadership and technology solutions. We'll focus on how the technology leader can be an integral component of the leadership team and share best practices around this. We will also address and discuss that “one issue” you are experiencing to ensure you leave with significant feedback and takeaways on your most important technology issues.

Sharing ideas and experiences with your fellow Network members is one of the most valuable portions of our roundtables. Come, share and learn with your fellow members as we work through your concerns and theirs.

## Individual Firm Meetings

You will have an opportunity after the final general session to meet as a firm to discuss and capitalize on learnings before you even leave the conference. We strongly encourage you to take advantage of this time to discuss and pinpoint key takeaways for implementation back at your firm and our team will be available for questions.

## Special Events

### Welcome Reception

Wednesday, June 9, 6 – 9 p.m.

### Service Fair

Wednesday, June 9, 6 – 9 p.m. during the welcome reception  
Thursday, June 10, 7 a.m. – 4 p.m. during conference meals and breaks

Plan to join fellow Network members, service providers and alliances for an hors d'oeuvre and cocktail welcome reception on Wednesday evening at the Orlando World Center Marriott hotel. The Service Fair continues through Thursday to provide additional opportunities to interact with exhibitors and discover how they can contribute to your business goals. For a current list of exhibitors and sponsors, please visit the conference website.

### Dinner Event

Thursday, June 10, 7 – 10 p.m.

Join us at sunset on Thursday evening for cocktails, dinner and musical entertainment on the hotel's beautiful Spa Terrace overlooking the water and golf course.

Spouses and guests are welcome to attend both the Wednesday welcome reception and the Thursday dinner at a cost of \$75 per person per event.

### Discount Tickets and Spouse/Guest Activities

We have partnered with the hotel to offer discount park tickets for conference attendees and their families. There are also a variety of local excursions available at discounted prices, and we will monitor purchase of excursions to facilitate our group attendees meeting together prior to departure. Please visit [www.localexpert.com/orlando/RSMI2010](http://www.localexpert.com/orlando/RSMI2010) for a complete list of discounts and to purchase tickets. A link to a list of park shuttle transportation options and pricing can be found on the conference website. You can also take advantage of another option for discount attraction tickets offered to RSM McGladrey employees by logging onto [www2.beneplace.com/buyandsave](http://www2.beneplace.com/buyandsave) with company id 70151567.

We are also launching the following programs during the week of the Network Leadership Forum.

## **Career Advisor as Coach Facilitator Training** Wednesday, June 9

To maximize the travel investment of HR professionals, we will be offering Career Advisor as Coach Facilitator training on Wednesday, June 9.

In 2009 McGladrey redesigned its performance management process, transitioning from a performance management focus (with designated performance advisors) to a culture of coaching and development (career advisors). To equip our career advisors for this role, we rolled out 12 hours of "Career Advisor as Coach" training.

Career Advisor as Coach Facilitator Training, an interactive one-day course on June 9, will develop your knowledge and skill as a facilitator of "Career Advisor as Coach." Participants will experience the course, discuss potential challenges and receive tools and resources to integrate it in their firms.

### Learning Objectives

At the end of the course, participants will be able to:

- Explain the role of the career advisor and the transition from performance management to career advising
- Use basic "coaching language" to minimize misunderstandings and generate a consistent coaching model, including addressing critical conversations
- Select and implement best practices within the McGladrey HR community around coaching
- Utilize tools and resources available to facilitate integration in their firms
- Develop and enhance your team members' ability to provide quality coaching and performance conversations with their advisees

The fee for this 8-hour train-the-trainer program will be \$345, which includes materials to train your team members and the DiSC profile. HRCI credit will be offered.

**To register for this training, visit the conference website at [www.regonline.com/networkleadershipforum2010](http://www.regonline.com/networkleadershipforum2010)**

## **Network Partner Development Program (PDP) '12** Monday-Wednesday, June 7-9

This two-year program, appropriate for directors/senior managers through partners with less than two years partner experience, focuses on leadership, growth, and client service. In addition to character-based leadership councils, this enhanced program introduces "Champions for Growth" to increase the effectiveness of your future leaders. We set the stage for your success over the next 20 months in this first of six sessions held Monday-Wednesday, June 7-9. Join the 113 graduates of Network PDP since its inception in 2004!

## **Executive Leadership Development Program 4** Tuesday-Wednesday, June 8-9

Managing partners, department or functional leaders, and potential leaders in firm roles will want to consider the Executive Leadership Development Program - with the inaugural session held Tuesday-Wednesday, June 8-9. With your peers from other Network firms, this 6-session/20-month program introduces a character-based model for leadership facilitated in peer coaching groups plus individual coaching sessions. By providing a framework for driving organizational change as well as personal change, we support the development of your ability to affect culture and strategic execution.

**To participate in either of these two programs, contact Joy Reutter ([joy.reutter@rsmi.com](mailto:joy.reutter@rsmi.com) or 800.537.7188) or Jenny Ingersoll ([jennifer.ingersoll@rsmi.com](mailto:jennifer.ingersoll@rsmi.com) or 800.537.7178) and enroll by April 23.**



## Tuition

The registration fee covers the Wednesday evening welcome reception, Thursday evening dinner, Thursday and Friday conference sessions, materials and meals. Hotel accommodations and air travel are not included.

\$695	Early Bird Rate (register online by April 2)
\$795	Regular Rate
\$75	Spouse/Guest Rate per special event

## Registration

Please visit [www.regonline.com/networkleadershipforum2010](http://www.regonline.com/networkleadershipforum2010) to register by May 10. Tuition must be paid by Visa or MasterCard credit card online at the time of registration. Once you register, you will receive an e-mail confirmation, and you may visit your registration record at any time to change or update your registration.

## Cancellation Policy

Due to financial obligations:

- A \$100 fee will be assessed for any cancellation received between May 11 and May 27.
- A \$695 fee will be assessed for any cancellation received on or after May 28.
- Refunds will be credited to the credit card that was used for registration.
- Substitutions are welcome at no charge.

## CPE Credit

Participants who attend the entire conference on Thursday and Friday may receive up to 12 hours of CPE credit. Actual credit will be determined after the conference.

(RSM McGladrey, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: [www.nasba.com](http://www.nasba.com).)

## Hotel

Orlando World Center Marriott  
8701 World Center Drive, Orlando, FL 32821  
[www.marriottworldcenter.com](http://www.marriottworldcenter.com)

Room rate: \$199 plus tax, single or double occupancy

Reservations: 800.564.3181 or online at [www.marriottworldcenter.com](http://www.marriottworldcenter.com) and enter group code: rsmrma.

Rooms under the RSM McGladrey group rate are being held until Friday, May 14. After this date we can no longer guarantee the group rate, but the hotel may still honor it upon request. Subject to availability, the group rate may be honored three days before and three days after the conference.

## Air Travel

The Orlando World Center Marriott is located 15 miles from Orlando International Airport (MCO), 40 miles from Orlando Sanford International Airport (SFB) and 10 miles from Kissimmee Municipal Airport (ISM). Airline reservations are the responsibility of conference guests. If you'd like to take advantage of negotiated reduced airfares on select airlines, you may contact H&R Block Travel Services at 563.333.2279. You will need to identify yourself as a RSM McGladrey Network member and charge the cost to your credit card. A \$23 transaction fee will be assessed for ticketing.

## Ground Transportation

From Orlando International Airport (MCO): 15 miles from hotel

Taxi: \$45 each way (estimate)

Shuttle: We have partnered with Mears Transportation to extend a \$4 discount off roundtrip shuttle service to/from the Orlando World Center Marriott (current regular price \$33). Mears Shuttle runs 24 hours a day between the airport and the hotel and departs the airport every 30 minutes. Arrival reservations are encouraged but not required. Return reservations are required.

Please visit the conference website to download your discount coupon and for information on making your reservations.

From Orlando Sanford International Airport (SFB): 40 miles from hotel

Taxi: \$95 each way (estimate)

From Kissimmee Municipal Airport (ISM): 10 miles from hotel

Taxi: \$30 each way (estimate)

Hotel parking: The current rate for self parking is \$12 per day and valet parking is \$21 per day.

Driving directions: Please visit the conference website for a link to driving directions.

## Contact Information

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