



2016
Catalog

Skills
for Corporate
Management &
Board Members

Lively, Informative & Fun!

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Are Your Team's Skills Up-To-Date?



Dear Friends,

Executive Education, Inc. is dedicated to keeping middle to upper level managers and corporate boards up-to-date on the latest business thinking. Our discussion leaders have decades of real world corporate experience as CEOs, CFOs, COOs and Board members as well as MBAs from leading business schools. We have provided continuing education to thousands of participants in most states and four countries.

Our best-selling seminars include topics such as:

- ***Cases in Corporate Ethics***
- ***Critical Thinking Skills***
- ***Driving Corporate Performance***
- ***How Good Companies Become Great***
- ***Risk Analysis and Management***
- ***The 21st Century Director***

Do you need professional speakers for your management conference? Executive Education also provides conference speakers. We can provide a single speaker who can present multiple topics or provide a multi-speaker, multi-day program.

I look forward to discussing how we can provide education to your organization. Contact me to schedule - I'm here to help!

A handwritten signature in cursive script that reads "Nancy".

Nancy J. Daly, BS, MBA
Client Service Manager

E-Mail: Nancy@ExecutiveEducationInc.com

Office: 734-475-0600

Participant Feedback

How nice! The time flew by. Very useful material – outstanding instructor. I wish all my CPE could be like this! This was my first Executive Education experience. I'll look for these classes in the future.

Little Rock, AR

This was the best, most interactive, most enjoyable CPE I have attended in a long time.

Manchester, NH

Executive Education consistently delivers courses that provide information and tools I can take back to my work place.

Indianapolis, IN

I really appreciate that you guys provide topics that are on point for industry professionals. Keep it up!!!

Greenville, SC

John is knowledgeable and has a great skill in sharing/presenting his information/thoughts. The class was interesting and I appreciate that it was interactive.

Des Moines, IA

Very informative and presented in an interesting manner.

Providence, RI

Presenter's style and expertise helped attendees stay engaged and he used the time well.

Westborough, MA

The class was great and provided a lot of information and ideas.

Beaverton, OR

Executive Education materials are very well organized and do a great job of highlighting the key topics and relevant info. I will definitely try to schedule more Executive Education classes in the future.

Atlanta, GA

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*Need to train
financial personnel?
Ask us about our
additional offerings
specifically created
for them!*



Discussion Leaders



Virgie M. Ammerman, MBA, CPA, CITP, is President of 180 Medical Billing Services located in Portage, MI and teaches at Spring Arbor University. She has held financial leadership positions in both industry and public accounting for the past 16 years. Virgie serves on the Board of Directors for the Michigan Association of CPAs, as the Chair of the Controller's Task Force and as a member of the Michigan Comeback Task Force. Virgie is the current Foundation Chair and Past Treasurer of the Portage Rotary club.



Robert A. Angell III, MS, CPA, is Senior Lecturer at Brandeis University, President of Angell Ventures and member of Launchpad Venture Group. An experienced CFO and COO with a public accounting background, Rob held senior executive positions at several high growth public and privately owned companies. He started his career at Ernst & Young, leaving there as a Senior Manager. A graduate of Brown University, Rob earned his MS in accounting from NYU's Stern School of Business.



Dan Chenoweth, MBA, CPA, helps clients take their strategy to the bottom line through rigorous project management and change management techniques. He has held executive level positions in general management, accounting and finance in a number of industries including telecommunications, printing and publishing, heavy equipment manufacturing and apparel manufacturing. Dan lives in Loveland, Colorado and is a former Colorado Society of CPAs board member.



John L. Daly, MBA, CPA, CMA, CPIM, is a Chelsea, Michigan-based management consultant specializing in costing, pricing strategy and pricing model development. He has taught continuing professional education courses since 1995 and began doing ethics seminars two weeks before the Enron scandal. John has been CFO for a Tier 1 automotive parts supplier and a large restaurant chain and COO for a window treatments manufacturer and retailer. He authored the well-received book, *Pricing for Profitability*.



Jay Giannantonio, MS, CPA, CIA, is a management consultant with over 30 years of experience specializing in finance transformation, internal audit, fraud, risk management, process improvement and Sarbanes-Oxley compliance issues. His professional experience includes long stays at PwC/Coopers & Lybrand, Verizon/Bell Atlantic and KPMG Consulting. Most recently, he was Vice President – Internal Audit for a \$1B commercial equipment rental and sales company. Jay lives in the Philadelphia area.



Richard A. Karwic, MBA, is a management consultant with over 40 years of financial and managerial experience. In addition to fifteen years of broad-based management consulting, he has over 15 years of experience as Chief Financial Officer for several businesses in a wide variety of industries. He has worked in over 100 businesses, including several divisions of well-known, Fortune 500 companies. Richard lives in Wethersfield, CT.



John F. Levy, MBA, CPA, is the CEO of Board Advisory, a firm that assists public companies, or companies aspiring to be public, with corporate governance, compliance, financial reporting and financial strategies. He has nine years experience with three large public accounting firms and served as CFO of both public and private companies. John currently sits on the boards of three public companies and three non-profits, serving as Chairman of one company and audit committee chair of another. He graduated from the University of Pennsylvania's Wharton School of Business.



Don Minges, MBA, is a fractional CFO who works in diverse industries at various development stages. His expertise is in profitability enhancement, strategic planning, venture capital, mergers & acquisitions, consulting, turnarounds, economic forecasting, cost accounting and financial analysis. Don has experience raising equity for several growing firms and has invested equity capital into promising businesses. He has served on the Board of Directors for many firms. He graduated with highest honors from the Fuqua School of

Business at Duke.



William F. O'Brien, MBA, CPA, is a financial management consultant and educator with over 40 years experience. He has held senior financial management positions with Intel and ROLM and served as CFO for several emerging, high technology companies. Bill has extensive experience in corporate planning, fraud assessment, financial analysis, cash management, managerial accounting and financial reporting in both domestic and international settings. He serves on the faculty of San Jose State University.



Patrick Stroh, MBA, CMA is president of Mercury Business Advisors in Minneapolis, MN. He serves on the board of directors of the Institute of Management Accountants and the ERM COSO Advisory Board. He is a former Chief Strategy & Innovation officer for UnitedHealth Group. Mr. Stroh is the author of ***Business Strategy: Plan, Execute, Win!*** published by Wiley, and ***Innovation Execution*** available October 2015. During a sabbatical, Patrick became a classically trained chef at Le Cordon Bleu!



Donna Sylver, MBA, CPA, has held CFO roles and various other financial leadership positions during her 25+ year career. Her broad range of industry experience consists of manufacturing, banking, consulting, healthcare, software, hazardous waste and communications. Named one of the 25 *Most Powerful Women in Banking* by U.S. Banker in 2005, Sylver currently is the managing partner of Sylver CPA, PLLC.



Diane D. White, MBA, CPA, CMA, is a Beaufort, SC-based consultant with 40 years of for-profit and non-profit business and finance leadership experience. Her executive roles include SVP Wachovia Information Services Corp.; SVP Freddie Mac Information Services; CFO, Futures Industry Association (nonprofit); and CFO, Workforce Resource, LLC, a nationwide residential mortgage financial services provider she helped start up in 2008. Diane recently retired from Workforce Resource to enjoy more fully Low country life with her husband Jim.

4 Most Overlooked Business Risks

Preparing for the Future

We have a tendency to focus on fighting today's fires without spending adequate time on bigger, more important risks inherent in today's inter-connected, competitive world. This seminar drills down into four commonly overlooked business risks, looking at how to anticipate, manage, mitigate or exploit them. We will discuss the professional obligations of the board and executive management to assess risks and the responsibility of internal and external auditors to evaluate the adequacy of these assessments.

Topics Discussed

Systemic Risk

- The six mega-trends facing organizations today

Strategic Risk

- The five signals of "de-maturity" in an industry
- Is your company ready to respond?
- Ten ways to integrate risk management into your strategy

Culture Risk

- Can measuring candor be tied to investor risk?
- The Rittenhouse Method of predicting market performance
- Correlating candor with market performance

Management Continuity Risk

- Does your organization risk operational disruption due to a key personnel loss?
- Risk management's role in management continuity planning

Cases and Group Discussion

This seminar includes group discussion of at least five cases and exercises

Target Audience: CEOs, CFOs, Board Members and managers with risk management responsibility.

Level of Knowledge:

Intermediate

CPE Credit: 8 hours group live

Area of Study: Audit

Prerequisite: Some risk management training or experience

Advanced Preparation:

None

Author: Dan Chenoweth

Acronym: MOBR

Acquisitions to Grow the Business

Strategy, Structure, Integration & Due Diligence

Mergers, acquisitions and alliances have been — and will continue to be — major avenues to organizational growth and increased competitive advantage. Yet, in spite of the great initial promise of many business mergers and alliances, few seem to yield the anticipated results. Numerous studies indicate that between 55% and 77% of mergers fail to accomplish their intended purpose. This course helps corporate managers identify, negotiate and consummate mergers and acquisitions that create shareholder value while avoiding the many traps that can cause post-acquisition failure.

Topics Discussed:

- Identify potential acquisition candidates
- Make strategic acquisitions
- Identify and understand company culture
- Value businesses
- Negotiate the right price
- Understand the keys to effective and efficient due diligence
- Prepare and review agreements
- Plan and execute an effective integration
- Key considerations when selling a business

Cases and Group Discussion

This seminar provides extensive case study analysis and many opportunities for group discussion.

The seminar includes a capstone case study beginning with acquisition identification through due diligence, valuation and concluding with a successful negotiation.

Target Audience: CEOs, CFOs, COOs, Board Members and managers with mergers and acquisitions responsibility.

Level of Knowledge: Intermediate

CPE Credit: 8 hours group live

Area of Study: Management

Prerequisite: None

Advanced Preparation: Bring a calculator

Author: John F. Levy

Acronym: AGB

Classroom interaction was fantastic and the materials structure was great.

— Atlanta, GA

Build Your Team

Get Results

Is teamwork the ultimate competitive advantage? Every manager's primary purpose is to lead a team. This seminar will help you get every member of your team on the same page, improve performance and realize the potential of the talent you have.

Topics Discussed

Poor Teamwork's Symptoms

- Myths about teamwork
- Lessons from great teams
- Discuss The Five Dysfunctions of a Team

Steps to Improve Teamwork

- Establish clear expectations
- Assess each individual and the team as a whole

Leadership

- Key duties and attributes of a true leader
- How a good leader can improve teamwork

Action Plans to Enhance Teamwork

- 15 step action plan
- How to gain commitment
- Create an action plan to harness teamwork

Cases and Group Discussion

This seminar includes ten case studies for group discussion.

Target Audience: Corporate managers of all levels

Level of Knowledge: Intermediate

CPE Credit: 8 hours group live

Area of Study: Management

Prerequisite: None, but management experience helpful

Advanced Prep: None

Author: Don Minges

Acronym: BYT



Cases in Corporate Ethics

Discuss Real Life Conflicts

Anyone who has ever attended a lecture-format ethics seminar knows there is a better way. *Cases in Corporate Ethics* provides an opportunity for lively group discussion of real world, ethical dilemmas.

Cases in Corporate Ethics examines eight cases drawn from real-life business conflicts involving corporate managers.

Topics Discussed:

We introduce new case selections to this seminar every year. Past cases have included these issues:

- How do you handle an owner who pays for personal expenses with company funds?
- Is a culture of fear and intimidation particularly susceptible to corporate fraud?
- What are your options when your employer is clearly breaking the law?
- Does any legislation provide effective Whistleblower protection?

Cases and Group Discussion

This seminar includes group discussion of eight real life cases.

Target Audience: Corporate professionals at all levels, particularly financial professionals with ethics continuing education requirements.

Level of Knowledge:
Intermediate

CPE Credit: 4 hours group live

Area of Study: Ethics

Prerequisite: None

Advanced Prep: None

Author: John L. Daly

Acronym: CCE

Scheduling: Schedule with *How Good Companies Become Great* or *Critical Thinking Skills* to provide a full-day seminar experience.

Best ethics course I have had in 22 years of practice.

- Ft. Wayne, IN

Critical Thinking Skills

Improve Decision Quality

“What were they *thinking?*” Why do business leaders sometimes make decisions that severely damage themselves and their organizations? It is tempting to attribute poor choices to a leader’s assumed incompetence, inexperience, bad character or low intelligence – but reality is much more complex.

Understand what factors really cause most blunders. When business decisions go badly wrong, all of upper management may find themselves deeply involved. This seminar provides conceptual and case study material to better equip you for the challenge.

Topics Discussed:

- Why critical thinking skills are so important to today’s professionals.
- How to evaluate critical elements of a leader’s decision-quality capability
- How to recognize factors that can sabotage decision-making by even highly capable people.
- How outstanding leaders use problem-finding skills to eliminate problem-solving drills
- How to develop an organization’s talent for preempting threats before they become disasters
- How to overcome three major decision quality obstacles: indecision, internal conflict, and time pressures

Cases and Group Discussion

This seminar includes group discussion of three exercises or case studies.

Target Audience: Middle to upper level corporate managers

Level of Knowledge: Intermediate

CPE Credit: 4 hours group live

Area of Study: Management

Prerequisite: None

Advance Preparation: None

Author: Diane D. White

Acronym: CTS

Scheduling: Schedule with any of our half-day seminars to make a full-day program.

The speaker was very engaging....His presentation was informal, allowing members to comment during various discussion topics ...provided added value.

- Indianapolis, IN

Driving Corporate Performance

Develop Competitive Advantage

Successful companies implement strategies that allow them to use their resources efficiently. By focusing on doing one thing well, organizations can create a competitive advantage that provides them superior performance.

Learn to create a roadmap to successful performance by tying the organization's metrics to its strategy and driving results.

Topics Discussed:

- Know why successful companies focus their strategy
- Understand why great companies use a "Hedgehog Concept"
- Develop strategies for success:
 - Cost leadership strategies
 - Differentiation strategies
 - Lean competition
- Manage the strategic planning process
- Create strategy maps to tie your strategic objectives to your financial performance metrics
- Translate strategic initiatives into accomplishments

Cases and Group Discussion

This seminar includes five opportunities for participants to practice their skills.

Target Audience: For those who are, or aspire to be, upper level managers

Level of Knowledge:
Intermediate

CPE Credit: 8 hours group live

Area of Study: Management

Prerequisite: None

Adv. Preparation: None

Authors: John L. Daly &
Rick Van Es

Acronym: DCP

Scheduling: Schedule before *Metrics Management* to make a 2-day seminar series.

Very relevant and interesting....Kept me interested, engaged, and attentive the entire day!!

- Chapel Hill, NC

Effective Business Writing

Cut Your Writing Time in Half and Double Your Impact

American businesses report losing \$1 billion a year to unclear writing that wastes time, kills contracts and turns off customers.

Optimize your time spent in communications as a writer and a reader. Prevent your readers from sending your documents to the circular file because they are too much work to decipher. Write with clear purpose and enjoy the results and time saved.

Be part of the solution, not part of the problem – write it right the first time.

Seminar Objectives:

- Cut writing time by an average of 50%
- Double your document's impact
- Identify effective writing's key elements
- Learn the simple, direct *Effective Business Writing* process
- Edit your own and others' documents effectively

Exercises and Discussion

This seminar combines lecture, discussion, individual hands-on practice exercises and group activities to assist participants in applying the five elements of effective business writing to an industry-specific case study. Participants will also get personalized feedback from the instructor on one of their own sample documents.

Target Audience: All professionals

Level of Knowledge: Intermediate

CPE Credit: 8 hours group live

Area of Study: Communications

Prerequisite: None

Advanced Preparation: Optional: Bring a one-page sample of your writing.

Author: Jeannie Ballew

Acronym: EBW

Comment: This highly rated seminar is an excellent in-house program for corporations.

This was the best CPE Class I have taken! Jeannie is an effective teacher.

- Bellevue, WA

Ethical Leadership

Power, Influence, Integrity and Trust

Leaders naturally wield power and influence at work – but not all use those invaluable tools with integrity. Leaders are constantly tempted to abuse their power, sometimes in ways that inflict great harm.

Betraying trust can destroy careers, whole organizations and lives. This is why trust is a top prerequisite for principled and ethical leadership. Trust changes everything. Research shows that leaders who continually work to earn and keep authentic trust reap enormous payback in all aspects of doing business.

This session addresses the most important concepts for building and maintaining trust and integrity in business. It explains how leaders get comfortable with the dynamics and application of power and influence. You'll learn the risks and consequences of misusing power and why "winning" so often really means losing. We'll examine professional standards pertinent to appropriately exercising power and influence.

Ethics & Trust

- Why ethics and trust require one another
- Why ethical leadership matters so much to sustainability and the bottom line
- Current real-life cases illustrating today's trust crisis in business leadership
- 3 questions identifying the "right thing to do"

Spotlight on Power and Influence

- Identify strengths to build your personal power and increase positive impact at work
- Understand how to wield significant influence even when you lack formal authority
- How to speak to be heard and get results

Cases and Group Discussion

This seminar will include group discussion of at least three real life cases.

Target Audience: Corporate managers at all levels

Level of Knowledge: Intermediate

CPE Credit: 4 hours group live

Area of Study: Ethics

Prerequisite: Management experience helpful

Adv. Preparation: None

Author: Diane D. White

Acronym: EL

Scheduling: Schedule with *Critical Thinking Skills* to make a full day program.



Ethics in the Real World

Living Values for Today

Business ethics is not just something “nice to do.” It can create long-term, competitive advantage and be a differentiating factor in today’s increasingly competitive environment.

Walk through eight steps to create an ethical business culture and learn specific ways corporate managers can make better ethical decisions.

Topics Discussed

Four Root Causes of Unethical Business Behavior

Eight Steps to Create an Ethical Business Environment:

- Establish a code of conduct and make it public
- Hire and promote people with well-grounded senses of personal ethics
- Interpret your code for ordinary circumstances
- Communicate expectations for employees to act in an ethical manner
- Lead by example
- Teach employees the basic tools of ethical decision making:
 - Six approaches to making better decisions
 - The four categories of ethical dilemmas
- Back your code with enforcement
- Factor values into every important organizational activity and decision

Ethical Leadership – Attributes and Practices

Case Studies and Discussion

This seminar will include class discussion of recent, real world ethics cases.

Target Audience: Corporate managers of all levels

Level of Knowledge: Intermediate

CPE Credit: 4 hours group live

Area of Study: Ethics

Prerequisite: None

Adv. Preparation: None

Author: Dan Chenoweth

Acronym: ERW

Scheduling: Schedule with *How Good Companies Become Great* to make a full day program.

One of the best ethics courses I've attended – very practical information.

- Little Rock, AR

How Good Companies Become Great

Secrets to Success

Some companies are “born” great; others change and become great along the way. This seminar will discuss how both new and established companies become great. This seminar benchmarks world class companies to understand the underlying principles that made them great.

The seminar begins with key lessons about business start-ups from Paul Hawken, author of ***Growing a Business***, and Guy Kawasaki, author of ***Art of the Start*** and ***Enchantment***.

Next, the seminar looks at research on existing businesses, beginning with the management classic ***In Search of Excellence*** and then focusing on Jim Collins’ research presented in ***Built to Last***, ***Good to Great***, ***How the Mighty Fall*** and ***Great by Choice***.

Help your organization transition from being merely good to truly great.

Topics Discussed:

- The link between great companies and their core values
- Getting the right people on the bus and in the right seats
- The Hedgehog Concept – a model to identify your company’s focal point to create maximum value
- How great company leaders differ
- Why a great company is like a flywheel
- Why some great companies fall from greatness

Cases and Group Discussion

This seminar includes group discussion of several cases.

Target Audience: Middle to upper level corporate management

Level of Knowledge: Intermediate

CPE Credit: 4 hours group live

Area of Study: Management

Prerequisite: None

Advanced Preparation: None

Author: Dan Chenoweth

Acronym: GTG

Scheduling: Combine with *Ethics in the Real World* to make a full day program.

The class materials and Dan’s personal experiences and input made for an exceptional learning experience.

- Indianapolis, IN

Know Your Cost

Double Your Profit

Companies with poor cost information make bad decisions about products that are not “average”. Poor information causes companies to overprice easy, high-volume “gravy” products and under price difficult, low-volume “dog” products.

Regardless of whether your company sells goods or services, learn how to double your profit by giving the dogs to your competitor and keep the gravy for yourself.

Topics Discussed:

Understand Real Costs

- Why traditional approaches are inadequate
- How superior cost information can double your profit
- Make Activity Based Costing spreadsheet easy
- Accurately understand overhead costs
- Recognize joint and by-products
- Add throughput costing to your toolbox

Accurately Assign Costs

- Product development and launch costs
- Depreciation
- Occupancy costs
- Supervisory costs
- Information technology costs
- Administrative costs
- Selling costs
- Excess capacity costs
- Interest and the cost of capital

Cases and Group Discussion

This seminar includes six exercises to facilitate group discussion.

Target Audience: CFOS, controllers, cost accountants, estimators, and engineering professionals

Level of Knowledge:

Intermediate

CPE Credit: 8 hours group live

Area of Study: Accounting

Prerequisite: Some experience in cost accounting or cost estimating

Advanced Preparation:

Bring a calculator

Author: John L. Daly

Acronym: KYC

Scheduling: Schedule after *Pricing for Profitability* to make a 2-day series.

The type of course I've been [looking for], provides tools and knowledge to truly zero in on properly costing our company's products.

- Bloomington, MN

Making the Deal

Fast-Paced Acquisition Case Studies

You will lead your company's due diligence team for sale or growth through acquisition. Your team will estimate the value of the target and then negotiate a deal with an opposing team. In your limited time, how do you determine and agree on a fair price? Where do you direct your focus? How do you get the other team off their positions? You will need to think on your feet. You will focus on financial analysis, including forecasting. Identify diligence red flags, think "outside-the-box" and then negotiate to "make the deal."

Fast-paced case studies will put you in the driver's seat. What would you do? This seminar lets you practice and prepare for real-life.

Topics Discussed:

- Identify red flags
- Make strategic decisions in real time
- Identify company culture issues
- Value businesses
- Negotiate a fair price
- Understand the keys to effective and efficient negotiation
- Prepare and review negotiation points
- Plan and execute a negotiation
- Turn Deal Breakers into Deal Makers
- Make the Deal!

Cases and Group Discussion

Five seminar case studies from real-life transactions will immerse you in significant cash flow and "buy-sell" issues you must resolve. Time limits will simulate real-life time pressures.

Target Audience: CEOs, CFOs, COOs, Board Members and managers with mergers and acquisitions responsibility.

Level of Knowledge:
Intermediate

CPE Credit: 8 hours group live

Area of Study: Finance

Prerequisite: None, although some financial modeling experience will be helpful.

Advanced Preparation:
Bring a calculator or laptop

Author: James R. Lambert

Acronym: MTD

Scheduling: Schedule with *Acquisitions to Grow the Business* to make a two-day series.

The best presented seminar I have attended in 20 years.

- Troy, MI

Presentation Skills for Success

Make Your Message Compelling

Presentation skills are essential to effective leaders, especially for those who must tell their company's story to both internal and external audiences.

In this seminar, you will learn (1) to deliver presentations effectively and with confidence, (2) to take "big picture" information and make it relevant to specific audiences, and (3) to conduct an effective "Question and Answer" session.

Topics Discussed:

Audience Assessment

- Audience profile
- Five questions to answer before preparing your presentation

Message and Media

- What does the audience need to know?
- What is the best way to convey that message?

How to Get Your Points Across

- Identify your normal presentation style
- Deal with "Presentation Anxiety"
- Sell your ideas using four critical elements

Q&A Sessions

- Anticipate questions
- Field questions
- Handle disruptive behaviors

Practice and Critique

The only way to become an effective presenter is to practice. We will introduce concepts and examples then allow time for you to prepare and deliver a presentation using a topic of your own choosing. Participants will provide each other feedback for improvement.

Target Audience:

Professionals at all levels

Level of Knowledge:

Intermediate

CPE Credit: 8 hours group live

Area of Study:

Communications

Prerequisite: None

Adv. Preparation: None

Author: Dan Chenoweth

Acronym: PSS

Scheduling: Schedule with *Effective Business Writing* to make a two-day series.

Great course. Very informative and helpful. Great class dynamics and structure. Very enjoyable.

- Bellevue, WA

Pricing for Profitability

Strategies & Techniques

Pricing professionals have long debated the importance of understanding value versus cost. This seminar will show you why BOTH are important and why choosing only a single pricing tool will leave a company exposed to frequent pricing mistakes.

Companies typically make their pricing mistakes on four types of products. This seminar will acquaint you with a variety of pricing skills that will help make your company the “smart” competitor in any pricing situation.

Topics Discussed:

- Know why strategy development comes first
- Understand why choosing a single pricing technique can mean disaster
- Understand your customer value proposition
- Understand why companies mess up pricing products that are not “average”
- Create a competitive advantage through superior product cost knowledge
- Avoid being the “dumb” competitor
- Understand pricing ethics and law
- Develop effective quoting models
- Know why the company with the best cost information wins

Cases and Group Discussion

This seminar includes cases for group discussion.

Target Audience: We designed this seminar for finance, sales, marketing, estimating, engineering and corporate management to attend together, intellectually challenging each group while ensuring that all parties have a thorough understanding.

Level of Knowledge:
Intermediate

CPE Credit: 8 hours group live

Area of Study:
1 hour Ethics
2 hours Accounting
5 hours Management

Prerequisite: None

Advanced Preparation:
Bring a calculator

Author: John L. Daly

Acronym: PFP

Scheduling: Schedule before *Know Your Cost* to make a 2-day series.

Excellent! The speaker was very knowledgeable.
- Rocky Hill, CT

Risk Analysis and Management

What Every Manager Must Know

In this turbulent world, regulatory agencies, external auditors and stock exchanges are asking questions they never asked before. Your board and executive management team had better prepare to give them answers! This seminar will walk you through the Enterprise Risk Management (ERM) process and what every board and management team must do.

Topics Discussed

Business Risk Categorization

- What is “risk”?
- What are the categories of risk?
- Understand the COSO ERM model

Risk Assessment and Mitigation

- Understand risk control processes
- Assess risk: small vs. large companies
- Understand the manager’s role
- Understand six risk management tools
- Know how to responsibly “frame” risk

Ethical Risk-Taking

- Take a brief quiz to determine if you are a risk-taker or a risk-avoider
- Know how ethics and risk concepts interrelate
- Learn risk management’s behavioral aspects
- Know how much risk you can live with
- Understand factors that distort our perceptions in framing risk and making risk decisions

Cases and Exercises

This seminar includes five interactive exercises as a vehicle for group discussion.

Target Audience: Upper level managers

Level of Knowledge: Intermediate

Area of Study:
6 hours - Auditing
2 Hours - Ethics

CPE Credit: 8 hours group live

Prerequisite: None

Adv. Preparation: None

Author: Dan Chenoweth

Acronym: RAM

Scheduling: Schedule with *Presentation Skills for Success* to make a two-day series.

Excellent. Very informative.

- Greenville, SC

Skillful Negotiations

Getting the Most from Your Banker, Customers and Vendors

No one is born a skilled negotiator. However, you can learn negotiation skills with training and practice.

This seminar provides insights into how to handle negotiation situations managers commonly encounter.

Participants Will Learn to:

- Negotiate bank lending agreements
 - Know the players in bank financing
 - Calculate debt capacity
 - Negotiate loan covenants
- Negotiate salaries
- Negotiate terms with customers and vendors

Topics Discussed:

- Why seek a Win-Win solution
- Why customers should always seek cost breakdowns and vendors should never give them
- Tips for:
 - Preparing for the negotiation
 - Making concessions
 - Responding to offers

Practice Negotiations and Discussion

This seminar includes five exercises including four practice negotiations.

Target Audience:

Management at all levels

Level of Knowledge:

Intermediate

CPE Credit: 8 hours group

live

Area of Study: Management

Prerequisite: None

Advanced Preparation:

Bring a calculator

Author: John L. Daly

Acronym: SN

Scheduling: This seminar

will work with most of our other full day seminars to make a multi-day series.

I really enjoyed this course and it was relevant to my work.
- Oklahoma City, OK

Staff Retention

Attract and Keep the Best People

Does it seem like you spend far too much time recruiting? Do your people leave just as they become productive? If you think your turnover is because Millennials are different from earlier generations, you probably are not looking at the real source of your problem. Learn the changes you should make now!

Topics Discussed:

- What a massive Gallup study says is the most important factor in employee retention
- How to prevent staff turnover
- Hear the logical reasons professionals leave
- Why exit interviews are a must
- What to do when people start defecting

Cases and Group Discussion

This session includes three group exercises

Target Audience:

Management at all levels including human resource professionals

Objective: Learn skills that will reduce staff turnover.

Level of Knowledge:

Intermediate

CPE Credits: 4 hours Group Live

Area of Study: Business Management

Prerequisite: Management experience helpful

Adv. Prep.: None

Author: John L. Daly

Acronym: SR

Scheduling: Schedule with *Cases in Corporate Ethics* to make a full-day program.



The 21st Century Director

Ethical and Legal Responsibilities of Board Members

The first years of the 21st century have seen unprecedented changes in the roles and demands on corporate and nonprofit directors. Board members now cope with ever fuller agendas, greater potential liability and increasing demands by shareholders, regulators, activists and the government.

This seminar discusses the legal and ethical responsibilities of directors and the special responsibilities of audit committee members.

Topics Discussed:

- The changing role of directors
- The impact of constituent activism on ethical and legal responsibilities
- The impact of recent business failures, Sarbanes-Oxley and Dodd-Frank
- The meaning of “Fiduciary Duty” and its impact on responsibilities
- The “Business Judgment Rule”
- The importance of directors and officers insurance, and what to look for in policies
- Responsibilities of various committees
- Audit committee qualifications
- The skills and experience needed for new board members
- How to work with your organization’s board
- How to be the best director you can be!

Cases and Group Discussion

This seminar includes group discussion of eight case studies.

Target Audience: This seminar is for those who serve, or aspire to serve, on a board of directors or professionals who work with the boards of their organizations. The seminar discusses public, private and not-for-profit boards.

Level of Knowledge:
Intermediate

CPE Credit: 8 hrs, group live

Area of Study
4 hrs. Ethics
4 hrs Management

Prerequisite: None

Adv. Preparation: None

Author: John F. Levy

Acronym: TCD

Scheduling: Schedule with one of our full day seminars such as *Acquisitions to Grow the Business* to provide a 2-day series.

Possibly the best CPE course I've taken. Interesting material. The instructor kept the class engaged all day.
- Bloomington, MN

Conference Topics

Here are **SOME** of the topics our speakers could present at your conference.

Achieving Strategic Success: Your Personal P-I-T Crew

William F. O'Brien, MBA, CPA, San Jose State University

Turning strategic goals into reality is as easy as 1-2-3. Learn about the three tools that can turn aspirations into achievement: Strategic Planning (P-Planning), Performance Based Management (I-Initiation) and Balanced Scorecard Reporting (T-Tracking). Discuss how to use these tools effectively as you race to achieve strategic success.

This session will be useful for managers in both industry and public practice; the P-I-T Crew can make your department a winning team in either environment. Leave this interactive and entertaining session with the insight for transforming your team into your company's catalyst for strategic success.

Better Performance Plans: The Microeconomics of Motivating Your Team

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Behavioral economics is an emerging discipline that uses elements of economics and psychology to enrich and expand conventional organizational theory. It explains why human behavior in real-life business situations can appear puzzling when viewed through traditional "carrot and stick" management theories taught to generations of MBA students.

Behavioral economics knowledge, dispel the mystery of negative employee responses to apparently well-structured compensation incentive programs. This session introduces and applies concepts like anchor points, the endowment effect, the status quo effect, the ultimatum game and more to help spot and prevent weak links in performance management and employee incentive programs.

Black Swans: Prepare for the Unexpected

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

John F. Levy, MBA, CPA, Board Advisory

Did you ever hear the phrase, "What you don't know can't hurt you"? Nassim Nicholas Taleb, in his book *The Black Swan*, postulates that it is exactly what we don't know that can hurt us the most. The risks we need to be most concerned about are the risks we cannot identify or predict. Taleb calls these risks "Black Swans". This session will discuss some historical black swan events and, more importantly, discuss how financial professionals and their organizations can prepare for a future we cannot even envision.

The Business Secrets of Trappist Monks

Don Minges, MBA, DLM Financial Consulting

The Business Secrets of the Trappist Monks, by August Turak, has been an unconventional business best seller. What makes the Trappist Monks successful? The short answer is the monks have discovered an amazing secret: "It is in our own self-interest to forget our self-interest." Just like every business, a Trappist monastery must be self-sufficient. Trappists are world famous for many products, from cheese to wool to, most famously, beer. If they do not sell their goods, they do not eat. The Trappists have learned the hard-way many lessons that are effective for every business; honing their business skills for 350 years. We discuss key lessons applicable to any business.

Business Strategy & Leadership; Plan, Execute, Win!

By Patrick Stroh, MBA, CMA, Mercury Business Advisors

Business strategy and leadership are inextricably linked. Strategy must be more than an annual process that produces a shelf-ready five-year plan in a three-ring binder. Strategy and leadership are wasted efforts without execution. Planning without execution is hallucination.

This webcast will provide valuable insight regardless of industry, business maturity, or current business volatility into how to lead strategy development and execution in your own organization.

The Civil Advantage: Workplace Ethics and Civility

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Ethics and civility are powerfully connected. What we call "manners" are behaviors with proven value as leadership tools to avoid destructive acts and build trust. People treasure their personal dignity, have amazingly long memories for personal slights and thrive when treated with respect. Rudeness, blustering, and bullying may win the occasional battle, but will always lose the war when it comes to lasting prestige and power. Moreover, ethical lapses are more likely if leaders do not use a civil approach to foster cooperation. This session explains how civility and ethics reinforce one another and offers 25 rules to foster considerate conduct in the workplace.

Cloud Systems: How Do I Know My Data is Secure?

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

The #1 question managers ask when it comes to cloud based software applications is "Is it secure?" There is no simple answer. You need to invest time to conduct due diligence on the particular offering to make sure the service provider's integrity and data security satisfies you. This session will focus on the key steps you should take when performing due diligence review of a particular cloud application.

Corporate Finance: Valuing a Business

Don Minges, MBA, The Numbers Guy

William F. O'Brien, MBA, CPA, San Jose State University

How do you value a business? This session discusses various business valuation methods whether for a start-up, spin-off or acquisition at any stage. Many valuation methods exist. Which method is right? Which is the 'best' for a given business? Program content includes crucial topics such as: the absolute single best metric, the Cost of Capital, the capital asset pricing model and Weighted Average Cost of Capital (WACC), Valuation methodologies (income, asset and market approaches), Discounted Cash Flow (DCF) and many more.

Creating Competitive Advantage: Developing a Roadmap for Sustainable Performance

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

One of leadership's primary responsibilities is to develop a strategy defining their company's unique and valuable position in the marketplace in order to provide a competitive advantage. What happens when break-through technology, new emerging competitors or global competition change the rules of the game? How well does your company recognize these changes and adapt to determine a new action plan? This session provides you with the ideas, skills and confidence to more proactively develop your organization's strategic plan.

Creating the Best Projections You Can

John F. Levy, MBA, CPA, Board Advisory

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

All we really know is the past, but all that really matters is the future. How can you take the historical knowledge you have about your company, its performance, your competitors, your industry and the economy to help your company plan for the future? This session examines current budgeting and forecasting best practices, as well as the critical roles of strategic planning and risk management, in developing projections. We look at the many uses of projections from cash management to compensation.

Crowdfunding: What You Need to Know

Don Minges, MBA, Executive Education, Inc.

The internet provides several new ways to raise money. These methods, called crowdfunding, allow organizations to raise money through donations, pre-sales, debt and equity, often from large numbers of people. Crowdfunding is getting easier due to emerging regulations the JOBS act provides. While not appropriate for all organizations, crowd funding has no shortage of success stories. However, risks, advantages, disadvantages and costs exist. This session provides a crowdfunding overview for professionals who want to learn about this new financing method, including key considerations for each crowdfunding type.

Culture Risk: Candor's Link to Performance

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Trust is the foundation for long-term business success, and candor is the language of leaders who choose to be trustworthy. Candor is open communication free from dishonesty or deceit. Candor is critical to building trust. The Rittenhouse Rankings, measure executive candor for 100 top U.S. companies. Rittenhouse's methods predicted the collapse of both Enron and Lehman Brothers. She correlates candor rankings with market performance, revealing the integrity of leadership, alignment with the corporate culture, and investor confidence. In this session, learn how the Rittenhouse model works.

Driving Performance with Metrics

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Do you struggle to keep budgets current in the face of an ever-changing business climate? Do you recognize that last year's actual spending can be far from what a department's spending *should* be? Twenty-first century performance metrics reduce work, reduce politics, provide flexibility and substantially improve the performance management process. This valuable session will show how to drive organizational performance using these powerful techniques.

Double Your Impact & Cut Your Writing Time in Half

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

American businesses report losing \$1 billion a year to unclear writing that wastes time, kills contracts and turns off customers. Optimize time spent in communications as a writer and a reader. Prevent your readers from sending your documents to the circular file because they are too much work to decipher. Write with clear purpose, and enjoy the results and time saved. Be part of the solution, not part of the problem – learn to write it right the first time.

Effective Change Management

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Research shows that far too many change initiatives fail to launch properly or endure because their leaders do not understand the psychology of human response to change. Inept change management can cause long-lasting damage or unintended consequences for individuals and organizations. If you have ever observed the negative results of participating in a failed change initiative or if you want to avoid an unnecessarily bad experience -- this session may open your eyes. Gain a new awareness of how change affects people and the tools you need to lead change effectively.

Ethics in the Real World: Power, Influence & Ethics

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

John F. Levy, MBA, CPA, Board Advisory

A sense of belonging is one of our basic human needs; unfortunately, it is one that can work against us. The CEO and other senior executives may exert their power and influence on management for unethical, even fraudulent, purposes in order to “make the numbers.” This session identifies the four sources of leadership power and the six primary ways people in authority positions can influence other’s behavior. It concludes with how managers can defend themselves when executives ask them to take unethical actions.

The Ethics of Risk Management

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

John F. Levy, MBA, CPA, Board Advisory

Taking unreasonable risks with your shareholder’s money is clearly unethical. On the other hand, taking no risk at all may irresponsibly waste your company’s resources. Today’s enterprise risk management and internal control standards define what management teams must do to evaluate and manage risks. This session examines risk management’s ethical issues, with the goal of keeping your name off the front page.

Excel: Become a Formula Expert

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Did you know that Excel 2010 has 402 functions and Excel 2013 has 453 functions? Did you know there are 12 different function categories? Did you know you could create your own functions? This fast-paced course will demystify some of the most useful Excel functions and show you how best to use them including a review of best practices for building formulas.

Excel: Everything You Need to Know About Pivot Tables

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

This intermediate Excel session provides an overview of using pivot tables to analyze data. The session uses practical examples to demonstrate pivot tables value data analysis. Topics reviewed in this course include pivot table advantages, creating pivot tables, connecting to external databases, and pivot table charts.

Jay did an excellent job in presenting and discussing this material. He also contributed several points from his personal experience, which added to the appreciation of the subject matter.

■ Indianapolis, IN

Five Business Books in 100 Minutes

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

You know you should read some business books, but finding time is often hard to do. Come hear popular speaker John L. Daly talk about five business books, including his own. This session makes it easy to catch up with the latest thinking in five different areas of business. John changes the mix all the time. Recent sessions have discussed **Great By Choice**, **How the Mighty Fall**, **Lean Thinking**, **Crucial Conversations**, **Pricing for Profitability** and **Snakes in Suits: When Psychopaths Go to Work**. Save time, learn the meat and bones of five popular business books in just 100 minutes.

The Five Dysfunctions of a Team

Don Minges, MBA, DLM Financial Consulting

What are the issues and symptoms of poor performing teams? How do we correct the root causes and what can we do to improve performance? This session discusses **The Five Dysfunctions of a Team** by Patrick Lencioni and will allow you to recognize when a workgroup is not living up to its full potential.

Fraud Alert! Loss Prevention and Control

William F. O'Brien, MBA, CPA, San Jose State University

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Fraud Alert! is one session you cannot afford to miss. Fraud will affect you in some manner; prepare for the inevitable. A study by the Association of Certified Fraud Examiners estimated fraud costs the world economy in excess of \$3.5 trillion per year (the equivalent of \$4,500 per employee). This same study estimated the course of normal audits discovers only about 11% of frauds versus approximately 19% discovered by accident. This session will examine various types of frauds and discuss ways to prevent, detect and investigate these activities.

Galvanizing, Enabling, and Measuring Innovation

By Patrick Stroh, MBA, CMA, Mercury Business Advisors

Finance is charged with aligning the organization's strategic and financial goals. This session discusses innovation and what you as a leader must do to galvanize, enable and measure for innovation value your organization. We will discuss multiple "channels" for innovation and their ability to drive business value.

Innovation attempts can be "flavor of the month" programs unless we tie them to existing business strategies and processes, such as the capital budgeting process.

Dan is one of the best facilitators I have seen. I would take another class from Dan based only on the fact that he is the facilitator.

■ Beaverton, OR

Generations at Work: Finding Common Ground

Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC
William F. O'Brien, MBA, CPA, San Jose State University

The dynamics of today's workforce ARE changing. Gone are the days when managers spent years working their way up the company's ladder. Because of the relatively small population of Generation Xers, leadership is transitioning many management positions from Baby Boomers directly to Millennials. The result is a greater age difference between colleagues.

This session explores the differences between the generations who make up the current workforce and the implications, both positive and negative, of the gap. We will explain why finding common ground is crucial to survival, and how to accomplish it. Receive practical tips and tricks to manage multiple generations in our work places.

Grant Writing for Nonprofits: What You Need to Know

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Nonprofit funding often involves securing and tracking grant funds. Whether you participate in developing nonprofit grant proposals or are part of the review process, this session will bring you up to speed on the "What and How" of successful grant writing. Learn the four stages of grant writing, tips for more effective grant proposals and how to avoid the most common grant proposal mistakes.

Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations

John F. Levy, MBA, CPA, Board Advisory

Leaders provide the culture, environment, values and incentives that foster and encourage change. Most importantly, great leaders create trusting environments that allow employees to challenge, innovate and work as teams. In a rapidly changing world, heartfelt leaders build great organizations. Understand the qualities of a great leader and find out how you can become a great and heartfelt leader no matter your title or place in an organization.

How Good Companies Become Great

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Some business writers are calling Jim Collins' books **Good to Great** and **Great by Choice** the best business books so far in the 21st Century. Well-researched and widely read, Collins' findings dispel many long-held business myths. This session will review Collins' research, compare it to other research and discuss the implications for management teams that want to transition from being merely good to truly great.

Presenters were very good. They were able to hold the group's attention, even in more technical areas of the discussion.

■ Indianapolis, IN

How to Succeed in a Chaotic World

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

The volume, momentum and complexity of change today have no precedent in human history. Resilience is the key to success when individuals and organizations face unexpected change. This presentation defines the term “resilience” and discusses the characteristics of resilient people. A “resilience continuum” self-assessment then provides the foundation for discussion about how anyone can learn to become more resilient.

Improve Teamwork

Don Minges, MBA, The Numbers Guy

Teamwork is something that every leader wants, but not necessarily something that comes easily. Learn how to set and communicate goals that motivate your team. Find out how to get members to work for the greater good rather than their own personal goals. Seamlessly manage both the team and its individual members. Popular speaker Don Minges tells how you can get your team working toward the same goals.

Leaders Eat Last

Don Minges, MBA, DLM Financial Consulting

Trust is essential because without trust, there can be no teamwork. Trust is like oxygen, when it is gone - we suffocate. This session provides a 15-step action plan to gain commitment from your team members, build trust, hold each person accountable and create results for your organization.

Lessons from the Playing Field: What Sports Can Teach Management

John F. Levy, MBA, CPA, Board Advisory

The Duke of Wellington is credited with saying. *“The Battle of Waterloo was won on the playing-fields of Eton.”* From before the 19th Century to today, sports have molded our business and professional leaders. Sports can teach today’s accountants about many critical business issues, including strategy, culture, metrics, management, innovation, adversity and sustainability. This session explores lessons we can all use from great, and not so great, moments in sports. Quit feeling guilty about playing those extra nine holes or watching “March Madness” – you are learning important professional skills!

I really enjoyed the sports analogy as it relates to business. A completely fresh approach....John did a fantastic job of relating all of the course work to the real world. I have multiple take-aways...very though provoking.

■ Greenville, SC

Management Continuity Risk: Build a Team to Sustain Your Business

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Many organizations wait too long to begin to think about succession and devote too little effort to building a strong management team. Loss of key personnel can present a huge risk. Talent management is the key to effective strategy execution and is the foundation for organization continuity. Learn why building a sustainable team is an important part of your organization's risk management efforts!

Microsoft Office 365: What You Should Know

John H. Higgins, CPA.CITP, CPA Crossings LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings LLC

Microsoft delivers Office 365 in a relatively new bundle of software and services on a subscription basis. The value proposition can be compelling and is driving small, mid-size and large organizations in transition to this model. This session provides you with all the information you need to assess whether Office 365 is right for your organization.

Microsoft OneNote: Get Your Notes Organized

John H. Higgins, CPA.CITP, CPA Crossings LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings LLC

Are you finding it difficult to keep all your notes organized? If you are someone who keeps notes all over the place, with some hand-written, others in e-mail, and still more in various Word or Excel documents, Microsoft's OneNote application may be the best solution for you. OneNote is a very practical note taking and management application that works on your Windows PC, Android or iDevice. Continuously synchronize your notes across all devices for access when and where you need them. This session gives a tour of OneNote and shows you how this app can help you pull it all together.

MS Word: Advanced Features

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Business professionals are often Excel experts, but are unaware of MS Word tools that can save time and make their written communications considerably more professional looking and easier to read. This session covers tools you have probably never used and others you may not be using correctly. Everyone who writes anything in your company could use this course!

The real world examples are wonderful and extremely helpful. John was very knowledgeable and was a very good presenter.

■ Manchester, NH

Nonprofit Boards: Step Up to Today's Challenges

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

John F. Levy, MBA, CPA, Board Advisory

The days when nonprofit boards were essentially a benign supportive group are fading. Heightened expectations for corporate governance quality and visibility have changed the composition and emphasis of nonprofit boards nationwide. This session focuses on how to understand, advise and help nonprofit boards meet their critical governance responsibilities. You will:

- Become acquainted with board responsibilities, needs, and challenges
- Learn about competencies needed on nonprofit boards
- Examine the current state of nonprofits and the implications for board activities
- Find out what board members must know about serving as a board member

Outlook - Beyond Email: What You May Be Missing

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Chances are you use Outlook every day to process email, but have you ever taken the time to truly explore all of Outlook's other features. This session shows you the other tools "beyond e-mail" that Outlook provides. You will learn numerous tips, tricks and techniques for managing your calendar, contact information and communications, to do list tracking, notes management and more.

Power and Influence: Getting It Done With Integrity

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Clumsy attempts at influence melt faster than ice cream on a summer day. Whether or not you have formal authority, learn to wield the power of your position in a meaningful way to get things done constructively. Identify the strengths that will help you build personal power and significant influence at work. Know the risks and consequences of misusing power and influence, and find out why "winning" so often really means losing. Get comfortable with the dynamics and ethical application of power and influence, while you adopt proven techniques to help your voice be heard and impact results.

Powerful Presentation Skills

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

This session will provide you with the essentials of how to prepare and deliver a dynamic presentation that will not only engage your audience but also enable them to remember your key points. This presentation uses a combination of lecture, discussion and group activities to provide you with a quick, practical approach to organize your key points and format your visuals for maximum impact. It also covers the basics of effective delivery such as body language, vocals, and word choice.

Pricing for Profitability: Why Cost Matters

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Three things can happen in pricing, and two of them are bad. Overpriced products are a missed opportunity, whereas underpriced products give away your products at a loss. When sales and accounting personnel fail to work together, the company risks becoming its industry's "dumb" competitor. Understand the difference between "dog" and "gravy" opportunities and get the knowledge you need to improve profitability. You will leave this session understanding why the company with the best cost information wins!

Principled Negotiations: Getting to Yes

John F. Levy, MBA, CPA, Board Advisory

According to negotiation guru Chester Karrass, *"In business as in life, you don't get what you deserve, you get what you negotiate."* Every transaction between two individuals is a negotiation. Often we view negotiations as a competition with one side "winning" and the other "losing." **Principled negotiation** is a better method that seeks to have both parties come out ahead. This session will examine best negotiation practices, providing participants with ways to "get to yes" faster and build lasting relationships.

Protect Yourself: Legal Responsibilities of Directors

John F. Levy, MBA, CPA, Board Advisory

The 21st century's first years have seen unprecedented changes in the roles and demands on our corporate and nonprofit directors. Board members now cope with ever-fuller agendas, greater potential liability, and increasing demands by shareholders, regulators, activists and the government. How should directors respond to these new challenges, and how can they protect themselves in a progressively litigious environment? This session discusses directors' legal responsibilities, with particular emphasis on audit committee and the audit committee financial expert responsibilities.

Resolving Ethical Conflicts

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

At some point in his or her career, every manager will face the choice of doing the right thing or taking the easy way out. Skillful handling of an ethical conflict can make a big difference in your career's trajectory.

This session discusses:

- Standards and techniques for resolving ethical conflicts
- How to have a conversation about a tough issue and still keep your job
- What to do when talking fails

This session could save your job and your career!

Risk Analysis and Management

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

William F. O'Brien, MBA, CPA, San Jose State University

In this turbulent world, risk management responsibility has fallen squarely on financial management's shoulders. Audit committees and external auditors are asking questions they never asked before. We must prepare to give them answers! Come get insights about Enterprise Risk Management (ERM) and what standards such as the COSO ERM model say every organization must do.

Selling Your Business: What You Need to Know

John F. Levy, MBA, CPA, Board Advisory

Baby boomer aging has created an unprecedented increase in businesses offered for sale, and this number will only continue to grow. In this demanding market, how do sellers get not only the best price but also the right terms and consideration? This session will examine the many reasons to sell, potential buyers, alternative forms of consideration, the structure of transactions, some legal matters and the team needed to maximize the price and protect sellers.

Sharpening the Saw: Why Successful Companies are Learning Organizations

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

In many organizations, the accountant's annual 40 CPE hours represent the most learning for any group of team members. This may mean the whole company is falling behind its competitors. Today, the greatest compliment you can pay a company is to say it is a "learning organization." Come hear nationally recognized speaker John L. Daly talk about how to make continuous learning affordable, and find out why your organization must continually learn.

Shift Happens: Make Corporate Culture Work for You

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

Managers tend to be logical, sequential, time-bound, detail-oriented and relentless in getting things done — skills necessary to be a good project leader. Generally, we are excellent at creating "bullet proof" project plans that include time and resources estimates, success measures and the activities leading to a successful result. However, larger organizations often do not accept our wonderful project plans. In fact, some individuals either may overtly or covertly try to sabotage the effort! Why? Corporate culture is a likely culprit. In this session, we will dispel corporate culture's mysteries and discuss how to make it work for you.

John Levy is an excellent speaker/presenter....His knowledge on the topic is top-notch, he uses business examples that are relevant and his humor is refreshing.

■ Indianapolis, IN

Speak So They Listen!

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

As a manager of the 21st century, you *cannot* build working relationships without effective communication! You must be able to translate abstract data into concrete language in order to drive profits and add value. Effective communication of complex ideas is crucial—not only to boards, audit committees and stakeholders—but to line managers, sales people and other team members. Most importantly, you must be able to communicate effectively with your clients and customers, or you risk the very lifeblood of your business. This session provides ideas that will help both your business and career.

Spotlight on Technology Tools

Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC

John H. Higgins, CPA.CITP, CPA Crossings LLC

Technology continually changes. Are you keeping up? This session will discuss three technology issues of interest to any modern financial professional, highlighting ‘The New Big Four’ Technology Ecosystems and how they increasingly force us to choose between Microsoft, Amazon, Google and Apple technology platforms. The session also discusses the pros and cons of adopting Office 365 and reviews new and upcoming changes in technology affecting our personal and professional lives.

Staff Retention: Attract and Keep the Best People

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Does it seem like you spend far too much time recruiting? Do your people leave just as they become productive? If you think your turnover is because Millennials are different from earlier generations, you probably are not looking at the real source of your problem. Learn the changes you should make now!

Strategic Outsourcing and Supply Chain Excellence

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

A study of over 150 procurement improvement initiatives indicates that significant savings are possible: 10-12% of the total spent over a 3-4 year period. Few, if any, other activities an organization undertakes can have this same bottom line impact. Strategic outsourcing and supply chain excellence represent “low hanging fruit,” yet many organizations don’t recognize its importance or don’t know HOW to proceed. This session highlights the importance of supply chain excellence and shows participants how to do it.

Very informative presentation and engaging.

■ Kansas City, KS

Strategic Risk: The Five Signals of “De-maturity” that Could Affect Your Organization

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

“De-maturity” occurs in established industries when a host of small innovations occur in a relatively short time, re-energizing and rejuvenating even mature industries. This session discusses the five signals of “de-maturity” and the ten ways to integrate change and risk into your strategy. Is your organization ready to respond?

Systemic Risk: Six Mega Trends

Dan Chenoweth, MBA, CPA, Chenoweth & Associates

In an inter-connected, multi-polar world, potential events in one area may have global impact. This session discusses six mega-trends and how they create both hazards and opportunities for organizations.

The Trustworthy Leader: Ethics and Trust

Diane D. White, MBA, CPA, CMA, Executive Education, Inc.

Betrayals of trust can destroy careers, whole organizations and lives. This is why TRUST is the top prerequisite for principled, effective leadership. People will do nearly anything for a leader they trust. On the other hand, they will resist or sabotage an untrustworthy leader. Trustworthy business leaders do not simply assume they are trusted or expect that authority and power can take the place of earned trust. Research shows that leaders who continually work to earn and keep authentic trust will reap enormous payback in all aspects of doing business. This session addresses the most important concepts for building and maintaining trust and integrity in business.

Time Hacks: Proven Ways to Save Time, Money and Get More for Less

Don Minges, MBA, Executive Education, Inc.

Are you in a rush? Behind at the office? Have too many emails in your inbox? If you are trying to catch up, or just want some free time to relax – this session is perfect for you. We will share dozens of proven techniques, tricks and tips that can immediately save you time, trouble and money. Prepare to take lots of notes!

Very good speaker/discussion leader. I really appreciate that you guys provide topics that are on point for industry professionals. Keep it up!!!

■ -Greenville, SC

Excellent information and discussion in cultures and cultural changes.

■ Kansas City, KS

2016 Fees

Seminars

Speaker Fee

Single Day or Partial Day.....\$2,350

Participant Fee

Full Day Seminar..... \$62/person

Half-day Seminar..... \$42/person

Conferences

Flat Fee (one or two sessions 50-100 minute sessions)\$3,100

Additional break-out sessions..... \$425 each

Travel Expenses

We bill travel based on actual expenditures.

Materials

Seminars

We provide seminar materials in a choice of three formats as part of our participant fee:

1. **Laptop** – Electronic manual for viewing on laptop or e-reader
2. **Print Essentials** – Condensed version, which participants may self-print
3. **Traditional** – Professionally printed paper manual (you return unused materials)

Conferences

We provide a print master consisting of the presentation slides and supplemental material that you may provide participants in paper or electronic form.

Customized Training

The above pricing assumes presentation of Executive Education’s standard materials. If the materials require substantial customization for our event, we will quote you a customized training rate prior to booking.

Wonderful conference with an excellent variety of topics and enjoyable presenters.

■ Iowa City, IA



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