

2019
Catalog

Skills
for Corporate
Management &
Board Members

Lively, Informative & Fun!

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



Dear Friends,

Executive Education, Inc. is dedicated to keeping corporate boards and management at all levels 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 three countries.

Our best-selling seminars include topics such as:

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

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

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Participant Feedback

The speaker was extremely effective in getting his points across while capturing my attention.

- Carmel, IN

Loved it. Will be back for future sessions.

- Vancouver, BC

This was THE best seminar I have ever attended. Every topic was relevant and the speaker was engaging

- Edison, NJ

Excellent program. Excellent presenter.

- Indianapolis, IN

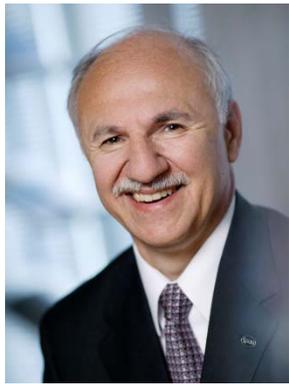
Discussion Leaders



Jeanne M. Ballew, **MA**, is founder and president of Jeanne M. Ballew Training and Development, a company dedicated to honing employee communication skills. She also owns and operates Edit Prose, a company providing editing and book coaching services to both fiction and nonfiction writers. She has trained over 25,000 people in areas such as business writing, assertive communication, presentation skills, listening skills, meeting facilitation and diversity.



Tim Cordes, **JD**, is an attorney who focuses on family law and probate administration. He is the current Secretary/Treasurer and a founding member of the LGBTQA Law Section of the State Bar of Michigan. Tim has been a member of the Stonewall Bar Association of Michigan since 2008, and served as President of the group from 2011 through 2014. As a straight ally, Tim seeks to be an advocate for the LGBT community on the issues of marriage equality and discrimination. He lives with his wife, Dana, in Bloomfield Township, Michigan.



Gary Cokins, **MBA, CPIM** is an internationally recognized author and speaker. He spent 30 years working with the consulting practices of Deloitte, KPMG, EDS and SAS. Gary has a BS in Industrial Engineering from Cornell University and an MBA from Northwestern University's Kellogg School of Management. His most recent books are ***Performance Management: Integrating Strategy Execution, Methodologies, Risk, and Analytics*** and ***Predictive Business Analytics*** published by Wiley and Sons.

Looks great! I wish all of my conferences could be planned this swiftly 😊

■ A State Society CPE Director



John L. Daly, MBA, CPA, CMA, CPIM, is a former chief financial officer who has worked with manufacturing, health care, hospitality, wholesale and retail businesses, spending the longest part of his career as the CFO of a Tier 1 automotive parts supplier. He has lead continuing professional education seminars since 1995 and does costing and pricing consulting. John authored the book ***Pricing for Profitability***, published by Wiley & Sons, Inc.



Sherre' L. DeMao, CGS, is the founder and CEO of BizGrowth, Inc., a full-service operational, marketing and strategy consulting firm that specializes in working with entrepreneurial enterprises. She is the author of ***Me, Myself & Inc.***, a book that encourages readers to shift from the guilt-ridden Work/Life Balance mindset to a more effective Life Synergy approach to working and being. Her *Me, Myself & Inc.* concept is also featured in the university textbook, ***Smart Start-Up Management***. Her next book, ***The Profitability Quotient***, is expected to be released globally in 2018.



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



Paul R. Harrison, MBA, CPA, CFP® is a veteran financial professional with industry experience in securities, financial planning, and software. Today, he teaches accounting at the University of Denver and has a CPA practice focusing on financial accounting, tax, fraud prevention and ethical management. Paul has an MBA from the University of Colorado and lives in Denver.



John H. Higgins, CPA.CITP, is the co-founder of CPA Crossings, LLC. John serves as a strategic technology advisor to CPAs in the planning and deployment of effective technology solutions and workflow automation. In 2015, John established CPA Crossings' new *Cloud Accounting Learning Center*, a knowledge-base of training, information and consulting services designed to help CPAs make the transformation to delivering client accounting services through the cloud.



Bud Kulesza, CMA, CFM, is former CFO of ITT Automotive, a multi-billion-dollar global company, Chairman of ITT Industries Canada and a respected leader of the accounting profession as a former Chair of the Institute of Management Accountants. Bud brings a wealth of knowledge and an entertaining high-energy style to all of his endeavors. From the boardroom to the podium, from the shop floor to the classroom, you will not soon forget his direct approach to addressing issues combining knowledge, experience and humor.



John F. Levy, MBA, CPA, is the CEO of Board Advisory, a consulting 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, national public accounting firms and has served as CFO of both public and private companies. John currently serves on the boards of three public companies, serving as vice chairman of one company and audit committee chair of another. He graduated from the Univ. of Pennsylvania's Wharton School of Business.



Don Minges, MBA, is a fractional CFO. His expertise is in profitability enhancement, strategic planning, venture capital, mergers & acquisitions, 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 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, control, financial analysis, cash management and managerial accounting in both domestic and international settings. He has served on the faculties of Santa Clara University and San Jose State University.



Bryan L. Smith, CPA.CITP, CISA, serves as a virtual CIO to CPA firms and professional organizations. He specializes in the planning and deployment of effective technology solutions. As co-founder of CPA Crossings, Bryan focuses on helping firm leaders understand the issues and opportunities associated with deploying information technology to improve productivity, enhance client services and increase profitability.



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, Donna is currently CFO of Raleigh-Durham International Airport.

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 officer’s insurance, and what to look for in policies
- Responsibilities of various committees
- Audit committee qualifications
- The Audit Committee “Financial Expert”
- 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 finance 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 hours group live

Area of Study

4 hours: Ethics

4 hours: Management

Prerequisite: None

Advance 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

4 Most Overlooked Business Risks

Preparing for the Future

We tend 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: Upper level corporate financial managers, internal auditors and public practice CPAs concerned about risk in their own business or who advise clients on risk management issues.

Level of Knowledge: Intermediate

CPE Credit: 8 hours group live

Area of Study: Auditing

Prerequisite: Some risk management training or experience

Advance Preparation: None

Author: Dan Chenoweth

Acronym: MOBR

Scheduling: To make a two-day series, schedule with *The 21st Century Director*

A good course. I liked the fact that we could have a very open discussion.

– Grand Rapids, MI

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, despite 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 CFOs, controllers and their advisors 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: Finance and accounting professionals who seek to learn more about mergers, acquisitions and divestitures

Level of Knowledge: Intermediate

CPE Credit: 8 hours group live

Area of Study: Management

Prerequisite: None

Advance Preparation: Bring a calculator

Author: John F. Levy

Acronym: AGB

Scheduling: Schedule with *The 21st Century Director* to make a two-day series.

Qualifies for ABV (Accredited Business Valuation specialist) training.

One of the best of all time. Enjoyably maintained.

– Boca Raton, FL

Appreciating Diversity in the Workplace

Respecting the Dignity of All Team Members and Clients

In this seminar, participants will learn the value of creating and nurturing a corporate culture that embraces diversity on all levels. This seminar will help your company to increase retention, amplify the variety and quality of ideas, and enhance team effectiveness, resulting in improved profitability and productivity. This seminar includes at least three interactive group exercises in the half-day version of the course and at least five interactive group exercises in the full-day version.

Topics Discussed:

- How diversity goes deeper than race, culture and gender
- Unconscious bias and its effects
- How to talk about sensitive issues
- Recognize nonproductive behaviors and impact
- Apply personal action plan to modify nonproductive behaviors

Cases and Group Discussion

This seminar includes at least five interactive exercises.

Target Audience: All personnel at all levels. The discussion leader will choose among the seminar's available exercises based on attendees' demographics.

Level of Knowledge: Intermediate

CPE Credit: 4 or 8 hours group live

Area of Study: Bus. Mgt.

Prerequisite: None

Advance Preparation: None

Author: Jeanne M. Ballew

Acronym: ADW

Scheduling: Schedule with a half day version *Effective Business Writing* to make a full day.

Note: This seminar is particularly well-suited for in-house seminars.



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 financial managers

Level of Knowledge: Intermediate

CPE Credit: 8 hours group live

Area of Study: Management

Prerequisite: None, but management experience helpful

Advance Preparation: None

Author: Don Minges

Acronym: BYT

Scheduling: Schedule with *The 21st Century Director* to provide a two-day series.

The speaker's enthusiasm for the subject and personal experiences added to our learning. I will definitely attend other courses he is leading.

– Roseland, NJ

Business Ethics

Cases from the Real World

Being consistently ethical is a challenge. Most of us have had to make tough choices. This session will discuss real world cases involving thorny ethical dilemmas and how to resolve them.

Being ethical is not the same as complying with the law and ethical issues are not always black and white. This session will review different professional ethical standards. What does integrity mean in the office? If you want to learn lessons from the best in a short time, this session is for you. Participate in engaging dialogue about how to prepare for the inevitable ethical situations. These lessons are valuable for every business leader.

Topics Discussed

- Why are ethics so complicated?
- What trade-offs must we make to solve ethical predicaments? What can we do?
- Should you speak up or be quiet?
- What do I do when I find myself in an ethical predicament?
- What are fundamental ethical principles for a businessperson?
- Is ethics situational?
- What is the Fraud Triangle?
- How do we resolve ethical issues?

Cases and Discussion

This seminar features cases and group discussion of real life situations.

Target Audience: Corporate financial managers, business owners, entrepreneurs and professionals who advise them, including CFOs, Controllers, Corporate Financial Managers, Directors, CPAs, and Managers.

CPE Credits: 4 hours group live

Program Level: Intermediate

Delivery Method: Group Live

Field of Study: Ethics

Prerequisites: Some corporate finance classwork or experience

Advanced Preparation: None

Author: Don Minges

Acronym: BE

Scheduling: Combine with *Shorten Month-end* to make a full day program.



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 financial 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?
- Can you protect the public interest without violating our profession's confidentiality rules?
- How can a corporate world CPA get in trouble with their board of accountancy?
- Is a culture of fear and intimidation particularly susceptible to corporate fraud?
- How can using the CPA credential get a corporate accountant in trouble?
- Is exaggerating your CPE hours a violation of our professional codes of conduct?
- 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 financial managers

Level of Knowledge:
Intermediate

CPE Credit: 4 hours group live

Area of Study: Ethics

Prerequisite: None

Advance Preparation: None

Author: John L. Daly

Acronym: CCE

Scheduling: Schedule with *Shorten Month-End* or *Staff Retention* to provide a full-day seminar experience.

Note: This seminar has special Louisiana, Michigan, Mississippi and New York editions.

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

- Ft. Wayne, IN

Critical Thinking Skills For Management Professionals

“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 the most blunders. When business decisions go badly wrong, financial professionals usually 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 financial 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: Corporate financial 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

Developing 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 financial managers

Level of Knowledge:
Intermediate

CPE Credit: 8 hours group live

Area of Study: Management

Prerequisite: None

Advance Preparation: None

Authors: John L. Daly &
Rick Van Es

Acronym: DCP

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

John is a great presenter and has a wealth of knowledge!
- Beaverton, OR

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

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

Author: Jeannie Ballew

Acronym: EBW

Scheduling: Schedule with *Appreciating Diversity in the Workplace* to make a two-day series.

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 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 the AICPA Code's *integrity* standard and other 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 financial managers

Level of Knowledge: Intermediate

CPE Credit: 4 hours group live

Area of Study: Ethics

Prerequisite: Management experience helpful

Advance Preparation: None

Author: Diane D. White

Acronym: EL

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

Diane White is a very dynamic, intelligent, and skilled

Discussion Leader. I would definitely like to take more seminars led by her!

- Raleigh, NC

Heartfelt Leadership

How Ethical Leaders Build Trusting Organizations

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

Topics Discussed:

- Ethics defined
- Are there business ethics?
- How to identify ethical issues
- Deciphering your ethical code
- Why ethical behavior is good for your business
- How to make ethical decisions
- Defining leadership
- Why trust matters
- Differences between leaders and managers
- Why we need trustworthy leaders

Case Studies and Discussion

The course material includes group discussion and case studies.

Target Audience: Those who have attained, or aspire to attain, management positions

Level of Knowledge: Intermediate

CPE Credit: 4 hours group live

Area of Study: Ethics

Prerequisite: None

Advance Preparation: None

Author: John F. Levy

Acronym: HFL

Scheduling: Schedule with one of our other half day seminars to provide a full day.

I really like the presentation style of this class. Definitely a different perspective rather than the traditional ethics courses I have taken.

- Des Moines, IA

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: Corporate financial managers

Level of Knowledge:
Intermediate

CPE Credit: 4 hours group live

Area of Study: Management

Prerequisite: None

Advance Preparation: None

Author: Dan Chenoweth

Acronym: GTG

Scheduling: Combine with *Business Ethics* or *Shorten Month-End* to make a full day program.

This was one of the best CPE classes that I have taken – very useful and interesting - great class!

- 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 underprice 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: Cost Accountants, Controllers & CFOs

Level of Knowledge: Intermediate

CPE Credit: 8 hours group live

Area of Study: Accounting

Prerequisite: This seminar is for degreed accountants who already have some cost accounting education and experience.

Advance Preparation: Bring a calculator

Author: John L. Daly

Acronym: KYC

Scheduling: Schedule with *Metrics Management* or *Pricing for Profitability* to make a 2-day series.

John's presentation style was excellent and ability to engage with others outstanding

- Indianapolis, IN

Metrics Management

Choose and Use Key Performance Indicators

Financial managers have long struggled to drive results through their financial planning and control processes. This seminar shows how to build a performance management framework, linking the company's high-level strategic objectives to performance metrics at the individual responsibility center level. The result will be an easier to use financial planning process that produces better projections and better control.

Learn how to *move the dials* on every executive's dashboard.

Topics Discussed:

- Link long term strategy to short term financial plans
- Use benchmarking to determine what performance should be
- Translate corporate strategy into specific initiatives for responsibility center managers
- Tips for taking performance management to the responsibility center level
- Best practices to get the whole company pulling in the same direction

Cases and Group Discussion

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

Target Audience: Those who are, or aspire to be, upper level financial managers

Level of Knowledge:
Intermediate

CPE Credit: 8 hours group live

Area of Study: Accounting

Prerequisite: None

Advance Preparation: None

Author: John L. Daly

Acronym: MM

Scheduling: Schedule after *Driving Corporate Performance* or before *Know Your Cost* to make a 2-day seminar series.

This topic is well thought out and presented. I was able to see how the items covered could be applied to a specialized industry.

- W. Columbia, SC

Predicting the Future

21st Century Budgets and Projections

We all make predictions in our personal and professional lives. We base our decisions to marry, buy a house, launch a new product or hire staff on expectations about the future. How can we use best practices and current research to improve our ability to predict the future?

We will examine current best practices in forecasting to help us prepare better budgets and projections. We will also examine budgeting pitfalls and ways to avoid budget traps. We will discuss the risks that cause actual results to vary from our predictions and discuss methods to deal with both known and unknown risks.

Topics Discussed:

Making Predictions

- Why great predictions are not intuitive
- How to separate correlation from causation
- How to recognize and overcome bias
- Who is Thomas Bayes and why he matters

Becoming a Great Predictor

- Why the ability to doubt helps
- Why it is better to be a fox than a hedgehog
- How non-conformists change the world
- Learn from the past without hindsight bias

Creating Great Projections and Budgets

- Why the many purposes and types of budgets and projections cause distortions
- How benchmarking and metrics have changed the budget process

Why Black Swan Risks Matters

- What is Black Swan risk
- Why the risk you don't know can hurt you
- Protect your company from unknowable risks

Case Studies and Discussion

The course material includes group discussion and case studies.

Target Audience: This seminar is for those who prepare, review, evaluate and use budgets and projections.

Level of Knowledge:
Intermediate

CPE Credit: 8 hours group live

Area of Study: Accounting

Prerequisite: None

Advance Preparation: Bring a calculator

Author: John F. Levy

Acronym: PTF

Scheduling: Schedule with *The 21st Century Director* to provide a two-day series.

Presentation Skills for Success

Make Your Message Compelling

Presentation skills are essential to effective leaders, especially for CFOs 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: Any financial professional

Level of Knowledge: Intermediate

CPE Credit: 8 hours group live

Area of Study: Communications

Prerequisite: Think about a topic you'd like to present.

Advance Preparation: None

Author: Dan Chenoweth

Acronym: PSS

Scheduling: Schedule with *Risk Analysis and Management* to make a two-day series.

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

- Bellevue, WA

Pricing for Profitability

Boost Your Bottom Line

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, marketing and engineering managers to attend together, intellectually challenging each group while ensuring that all parties have a thorough understanding. We suggest financial managers also attend *Know Your Cost*.

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 Financial Manager Must Know

In this turbulent world, risk management responsibility has fallen squarely on financial managers' shoulders. Audit committees and external auditors are asking questions they never asked before. We must prepare to give them answers! Gain insight about Enterprise Risk Management (ERM) and what professional standards say every company 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
- Receive an update on SOX risk management
- Assess risk: small vs. large companies
- Understand the financial 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 financial managers

Level of Knowledge: Intermediate

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

CPE Credit: 8 hours group live

Prerequisite: None

Advance Preparation: None

Author: Dan Chenoweth

Acronym: RAM

Scheduling: Schedule with *The 21st Century Director* to make a two-day series.

Excellent. Very informative.
- Greenville, SC

Shorten Month-End Closing Best Practices

Surveys show that the average North American company completes their monthly financial statement closing in five days. However, some companies can close their books in one day or less. Many financial managers who feel pressured to shorten financial statement preparation time struggle with the balance between accuracy and speed.

This seminar will focus on the key aspects of every close and provide attendees with methods to prepare better quality financial information more cheaply and in less time.

Topics Discussed Include:

- Trends in financial statement closings including the Quick Close, Soft Close and Virtual Close
- Review and discuss information systems' headaches that slow you down
- Work through examples of close cycle "time killers" and how to resolve them
- Get inventory and cost of sales under control
- Identify the improvement projects that will yield the biggest benefit
- Review what leading edge finance managers are doing to close more quickly

Cases and Group Discussion

This seminar will use hands-on exercises and provide opportunities for group discussion of the issues relating to performing a quick financial statement closing.

Target Audience: Corporate financial managers

Level of Knowledge: Intermediate

CPE Credit: 4 hours group live

Area of Study: Accounting

Prerequisite: None

Advance Preparation: None

Author: John L. Daly

Acronym: SME

Scheduling: Schedule this half-day seminar with one of our other half-day seminars such as *Cases in Corporate Ethics* to provide a full day program.

Wow. Best class I've taken all year.

- Indianapolis, IN

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 that financial 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: CFOs, controllers and other corporate financial managers

Level of Knowledge:
Intermediate

CPE Credit: 8 hours group live

Area of Study:
Traditional: Mgt.
NASBA: Bus. Mgt.

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.



Really great seminar
- Troy, Michigan

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

John is an outstanding discussion leader and presenter! I wish John held all of the live presentation CPE courses I take! He interacts very well with the group and he keeps things serious and studious, but light-hearted. I couldn't have been happier with the course!

- Ft. Wayne, IN

Target Audience: Corporate and public practice managers who have professional staff working for them

Level of Knowledge:
Intermediate

CPE Credits: 4 hours group live

Area of Study: Business Management

Prerequisite: Management experience helpful

Advance Preparation: None

Author: John L. Daly

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

Shorter Topics

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

3 Market Analysis Priorities to Drive Profitability

Sherre' L. DeMao, CGS, SLD Unlimited Biz Growth, Inc.



New

If you only analyze financial statements, you are probably missing many opportunities to increase profitability and cash flow. In this session, you will learn a Profit Sizing™ process involving three key types of market analysis areas:

- 1) Business offerings;
- 2) Market segments; and
- 3) Geographic pockets

Developed through 30 years of studying entrepreneurial enterprises, this session brings new thinking around profitability that encompasses an inside-out look, leading to better strategic decisions and profits. You will walk away with an analysis tool you can immediately put to use that will improve your organization's promotional strategy, marketing concentration, price justification, operational decisions and cash flow.

4 Critical Factors to Create Sustainable Growth

Sherre' L. DeMao, CGS, SLD Unlimited Biz Growth, Inc.



New

The world changes rapidly. If your business strategy is not built on this premise, you are already falling behind. Intelligence, emotional acumen, agility, and profitability are all critical to growth, and essential amidst constant change.

Based on validated research and best practices, this session will introduce you to a Sustainable Growth Model™ to enhance your organization's ability to grow organically through four critical success factors: 1) Intelligence Quotient (IQ); 2) Emotional Quotient (EQ); 3) Velocity Quotient (VQ); and 4) Profitability Quotient (PQ).

When all four quotients operate at high levels, you are in the best possible position for sustainable, value-building growth.

5 Business Books in 100 Minutes

Don Minges, MBA, The Numbers Guy CFO, LLC

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



New

You know you should read some business books, but finding time is often hard to do. Come get a 20-minute executive summary of five business books. This session makes it easy to catch up with the latest thinking in five very different topics. We change the mix all the time. Recent sessions included ***Brain Rules, Leaders Eat Last, Snakes in Suits: When Psychopaths Go to Work, Quiet: The Power of Introverts in a World that Can't Stop Talking*** and ***Zero to One***. Save time, learn the key lessons of five business books in just 100 minutes.

Aligning Budgets to Strategy – The Key to Long Term Profitability

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



In most organizations, strategic planning and budgeting are separate processes, making them out of alignment from their inception. This webinar explores a practical “real world” planning approach that aligns spending to long-term strategy, creates a culture of accountability and responsibility, and might actually be fun when everyone gets on board. The result will create a model for your organization’s future growth and profitability.

Becoming a Great Predictor: Create Better Forecasts

John F. Levy, MBA, CPA, Board Advisory

Imagine being able to see into the future with confidence. The ability to be a great forecaster is not innate but learned. By examining great forecasters, we can learn to improve our ability to predict the future. We will examine best practices and current research to improve our ability to predict events that will affect our business.

Black Swans: Prepare for the Unexpected

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

Jay Giannantonio, MS, CPA, CIA, 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.

Business Ethics Don't Exist: The Only Ethics Rule You Need to Know

John F. Levy, MBA, CPA, Board Advisory



Most ethics courses focus on unethical individuals and their terrible misdeeds. We don’t need another course on lessons from Enron or individuals committing fraud. Most unethical failures result from unethical individuals. Instead, this session will focus on how good people can do better, why there is no such thing as business ethics and why we only need one rule to lead ethical lives.

Very exciting topic. Information was useful and personal experience made it relatable.

■ Bloomington, MN

Business Intelligence and Analytics: Make Sense of Your Data

Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC



New

Volatility and complexity are the new normal. Most organizations are drowning in data, but starving for information. The finance and accounting function has the opportunity to leverage Big Data and the continuum of analytics – descriptive, diagnostic, predictive, and prescriptive. All are useful for better decision making. Collecting, validating, and reporting data is not the same thing as analyzing information where we can glean valuable, actionable insights. In some ways the finance function is many years behind other disciplines such as marketing, sales, and supply chain managers, in applying analytics. How can the CFO's function catch up?

The Business Secrets of Trappist Monks

Don Minges, MBA, The Numbers Guy CFO, LLC

"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 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.

Cases in Corporate Ethics: Real Life Dilemmas

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

Anyone who has ever attended a lecture-format ethics session knows there is a better way. This session examines real world ethical dilemmas that others have encountered. Sometimes professionals handle their situations skillfully; sometimes they are left wondering "what happened?" long after the fact. Get prepared before something happens to you. Once you have taken a case-based ethics session, you will never want anyone to listen to someone just read you the rules ever again.

The Civil Advantage: Workplace Ethics and Civility

John F. Levy, MBA, CPA, Board Advisory

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.

Communications Success: Make Your Message Stick

Jeannie M. Ballew, MS, EditProse
John F. Levy, MBA, CPA, Board Advisory



New

Great ideas are only great if they are implemented. How can you make your ideas matter to others? Learn the six steps to make your ideas stick.

Comprehending Financial Statements for the Non-Financial Manager

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

When a financial professional refers to a number on your financial statements, do you just look at the number and give them a knowing smile, pretending to understand what they are talking about? This session explains Income Statements, Balance Sheets and Statements of Cash Flow in language that ordinary people can understand, drawing analogies to your own personal finances that anyone can understand. Don't just smile and nod, learn how to become part of the conversation about your organization's finances.

Corporate Ethics: Cases in Diversity and Inclusion

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



New

The AICPA Code of Professional Conduct makes it clear that workplace harassment and discrimination is unacceptable, but gives little further guidance. Other behavior standards can help us fill the gaps. This session will discuss cases involving ethical issues relating to diversity, sexually hostile work environments, gender identity, and discrimination.

Corporate Performance Management for Strategy Execution

Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC



New

Poor strategy execution frustrates many executives as their organizations struggle with performance improvement, making decisions using intuition in the absence of hard data. Corporate performance management (CPM) seamlessly integrates many techniques including strategy maps and a balanced scorecard. Together they align manager and employee behavior, actions, and priorities using key performance indicators (KPIs) with specific targets to enable accountability.

Develop Your Organization's Scorecard: Keep Success on Track

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



New

The business world has considered the Balanced Scorecard to be the best practice method for identifying and communicating performance information for more than twenty-five years. Still, many organizations have not yet adopted Balanced Scorecard methods. This session provides overview of the Balanced Scorecard aimed at executives and financial managers who need to understand how a Balanced Scorecard works in practical terms

Double Your Impact & Cut Your Writing Time in Half

Jeannie M. Ballew, MS, EditProse

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 – learn to write it right the first time.

Driver-based Budgeting & Rolling Forecasts for Fast Analysis

Gary Cokins, MBA, CPIM, Analytics-Based Performance Management, LLC



The annual budgeting process is often criticized as a fiscal exercise done by the accountants that is obsolete soon after it is published, prone to gamesmanship, cumbersome, not being volume sensitive, and disconnected from the strategy and needed risk mitigation spending. You can resolve these deficiencies using capacity-sensitive driver-based expense projections. Driver-based budgeting allows for quick scenario planning and far easier analysis of a growing organization whose future may look nothing like today. The budget can be periodically refreshed to create rolling financial forecasts extending beyond the fiscal year end. Learn how managerial accounting can become managerial economics.

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 you how to drive organizational performance using these powerful techniques.

Find Your Strengths

Virgie Ammerman, MBA, CPA, CITP, Executive Education, Inc.

Gone are the days of personality testing geared to 'fix' our weaknesses. Welcome to the art of capitalizing your strengths and improving your career and the careers of those around you! This session will help you identify your strengths and embrace them. We will also help you identify strengths in others and use this information to build stronger teams designed to problem solve and build forward momentum!

I really enjoyed the process improvement sessions by Bill. I think more avenues like this are good for these sessions/conferences.

■ Iowa City, IA

The Five Dysfunctions of a Team

Don Minges, MBA, The Numbers Guy CFO, LLC

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, Executive Education, Inc.

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.

Generations at Work: Finding Common Ground

William F. O'Brien, MBA, CPA, Executive Education, Inc.

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 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.

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 environments of trust 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.

Improve Teamwork

Don Minges, MBA, The Numbers Guy CFO, LLC

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.

Improve Your Profit: Identify Cost Cutting Opportunities

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

Could your company survive the next business downturn without a reduction in force? Discover ways to make your company more efficient and profitable so you are ready! This fast-paced session will teach you how to use performance and process improvement techniques to identify and implement cost saving operating controls and processes. Based on the principles of Finance Transformation Framework and Big 4 consulting techniques, this session will show the experienced financial manager how to make their teams more efficient and value-added when applying these lessons in their organizations.

Introvert Power: Why Quiet Leaders are Successful

Don Minges, MBA, The Numbers Guy CFO, LLC

Leaders were once chosen for their character but today we live in an age where loudmouthed extroverts seem to take center stage in everything, including business, politics and entertainment. While the talkative, charismatic leader makes the front page of business magazines, recent research shows that successful business leaders tend to be more reserved, pensive and sometimes outright shy. Learn why your desire to spend significant time inside your own head may be your greatest asset.

It's All About Action! Deeds, Not Words, are What Really Count.

William F. O'Brien, MBA, CPA, Executive Education, Inc.



Talk is cheap! Action moves people better than unfulfilled ideas. Actionable concepts serve as a catalyst for change. This session will assist you in developing actionable messages and achieve buy-in as you implement new processes. Discuss the power of the planning and the impact of the quantity, strategy and tactical trifecta..

Heed the advice of legendary University of Alabama football coach, Paul "Bear" Bryant, and "Cause something to happen."

The discussion leader was outstanding – actually one of the best.

■ Indianapolis, IN

Implementing the Balanced Scorecard: Keep Success on Track

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

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



An introduction and overview of the Balanced Scorecard aimed at executives and financial managers who want or need to understand the principles of the Balanced Scorecard and how it works in practical terms.

Know Your Cost – Double Your Profit

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

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 underprice 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 keeping the gravy for yourself

Leaders Eat Last

Don Minges, MBA, The Numbers Guy CFO, LLC

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.

Leadership and Teamwork

Don Minges, MBA, The Numbers Guy CFO, LLC

What are the key duties and attributes of a true leader? What should a good leader do to improve teamwork? Learn how leading effectively will improve your whole department’s performance.

Leadership by the Numbers

C.S. “Bud” Kulesza, CMA, CFM, Executive Education, Inc.

Many people’s memoirs have included lists of advice for anyone who aspires to a leadership position. This entertaining and informative session compares these lists and looks for common themes that can provide important lessons for anyone who has, or aspires to have, a leadership role in their organization.

John Daly was excellent! I hope he will be returning next year.

■ Atlanta, GA

My takeaways were lots of the leadership ideas I learned today.

■ Indianapolis, IN

LGBT Employees and their Families: What Every Manager Should Know

Tim Cordes, JD, Cordes Law

New

People with differing sexual orientations and gender identities have always worked among us. Until relatively recently, our lesbian, gay, bisexual and transgendered colleagues may have hidden their private lives from management and co-workers fearing possible repercussions. With increasing social acceptance and legal protections, many of our LGBT colleagues are no longer hiding their true selves in the workplace. Changes in the law now allow gay and lesbian couples to form families, creating new issues that employers and supervisors must understand. This session will help you become aware of the terminology and issues of managing in a diverse workplace that includes members of the LGBT community.

Managing People: Conquering the Soft Side of Your Job

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

New

Financial managers rarely get fired due to lack of GAAP or tax knowledge. They get fired because they fail at the people side of their job. An accountant with good people management skills can rise to CEO, but if you can't manage and develop people, your career scope will be very limited. Attend this webinar to gain people management insight from C-Suite veteran John L. Daly.

Measuring and Reporting on Sustainability

John F. Levy, MBA, CPA, Board Advisory

Accountants are ideally suited to *measure* sustainability efforts because we collect and analyze our organizations' information. Until we can adequately measure sustainability efforts and their returns in terms of time and money, many businesses will not fully embrace sustainability. Accountants should lead efforts to *report* on sustainability because we have the experience and knowledge to create clear, concise and informative documents. This session reviews the challenges in measuring and reporting sustainability efforts, discusses current best practices and provides thoughts about the future of sustainability measurement and reporting.

This guy was absolutely fantastic. Down to earth, sincere, gave great and understandable examples. Relaxed, approachable. Materials excellent, organized.

- Fargo, ND

This was very informative. Absolutely fantastic. I would love to see John Daly back again next year.

■ Bloomington, MN

Nonprofit Boards: Working with or Serving on Nonprofit Boards

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

The NOT Not for Profit: Run Your Organization like a Business

John F. Levy, MBA, CPA, Board Advisory



Successful not-for-profit organizations run on passion, drive and creativity. However, successful not-for-profits also need to plan properly, allocate resources efficiently and report tangible results to stakeholders. The best not-for-profits use the same business principles that create the most successful companies to achieve their goals. We will examine how your not-for-profit can benefit from key principles that drive the world's most profitable businesses.

Office 365 Software Applications Lightning Round

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

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

At last count, there were over 20 unique applications available in the Office 365 bundle. These range from the traditional Office desktop applications such as Excel, PowerPoint, Word, etc., to a whole new generation of cloud-based applications such as OneDrive, SharePoint, Yammer, Delve and more. These newer cloud-based applications will help you transform to a digital business model. This session will provide a high-level review of all the core Office 365 cloud applications so you can assess the strategic potential for your organization.

OneNote – Mastering Organization of Your Notes & Correspondence

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

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

OneNote is rapidly becoming one of the most popular applications in the Microsoft Office and Office 365 product suites. The reason for this becomes evident when you learn about all you can do with OneNote to record and manage notes, to do lists, meeting agendas and much, much more. This session reviews all the features OneNote offers and examines how to apply them.

Open Book Management: Making it Work in the Real World

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



Some organizations create extraordinary success by broadly sharing financial information with team members at all levels. Others have tried and failed. This session discusses how real-world organizations have transformed their cultures using open book management. You will gain insight into what works and what does not, learning how giving team members a stake in the action can motivate everyone to create company performance far beyond anyone's expectations.

Optimizing Your Staff's Performance: Creating and Sustaining the Best Team

William F. O'Brien, MBA, CPA, Executive Education, Inc.



A chain is only as strong as its weakest link. The same applies to departmental performance—the overall result is only as strong as its weakest contributor. The four elements in this process are (1) hiring, (2) development, (3) leadership and (4) environment. Discuss how to effectively use these elements in creating outstanding organizations. Discover the power of the 10 Attributes for Leadership Success and the negative impact of Leadership's Fatal 13. Above all, learn how to combine these four elements as a successful catalyst for sustained high-quality output and results.

Powerful Presentation Skills

Jeanne M. Ballew, MS, EditProse

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.

The Power of "Why"

William F. O'Brien, MBA, CPA, Executive Education, Inc.

Today's business leaders need to understand more than simply the financial impact of operations. They need to understand "why" these outcomes occur. Only by understanding the causes can you develop the appropriate actions for improved results. Learn how to understand the root causes of your financial performance. Discover how to use the "5 Whys Method" of root cause identification. Explore how to use these root causes in creating actionable reports.

Successful financial managers know how to "Connect the Dots". Put the "Power of Why" in your analytical toolbox! Start connecting today!

Pricing for Profitability: How Finance Can Save the Bottom Line

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. Accountants involved in pricing can help the company understand the difference between "dog" and "gravy" opportunities with knowledge that directly translates into often vastly improved profitability. You will leave this session understanding why the company with the best cost information wins!

Pricing Strategies: Find the Right Fit for Your Products

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

A logical pricing strategy exists for every situation, but different situations call for different strategies. While choosing the right strategy does not guarantee success, choosing the wrong strategy usually guarantees failure. Attend this session to gain insights into common pricing strategies and learn where your organization's products belong.

Principled Negotiations: Getting to Yes

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

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.

Profit Improvement: Ten Tips

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

Don Minges, MBA, The Numbers Guy CFO, LLC

When a company experiences poor financial performance, the financial person is often the first to go. Whether times are good or bad, asking the tough questions and making sure the organization is efficient and stays efficient are part of the financial manager's job. Proactive efforts by financial management can prevent the need to "catch up." This session provides 10 techniques for improving your company's bottom line.

The session with Don Minges was very informative for me.

■ Indianapolis, IN

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.

Risk Analysis and Management

William F. O'Brien, MBA, CPA, Executive Education, Inc.

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.

Speak So They Listen!

Jeanne M. Ballew, MS, EditProse

As a financial 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.

Staff Retention: Attract and Keep the Best People

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

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

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!

Step 1 in Change: Understand Your Culture

John F. Levy, MBA, CPA, Board Advisory

Corporate Culture is the set of rules, values and norms that define an organization's behavior. Culture is at its core, "the way we do things around here". Ultimately, culture determines not only how the organization defines success, but also how the organization accomplishes it. Understanding corporate culture is critical to the ability of any organization to succeed.

Systemic Risk: Six Mega-Trends Facing Organizations Today

Richard Karwic, MBA, Executive Education, Inc.

Worldwide trends can impact our business. In general, accountants are so detail oriented that we sometimes don't pay attention to the "bigger picture" and don't see the impact emerging business models, innovative technologies or global competition have on our organizations. This session discusses six mega-trends and how they can create both hazards and opportunities for your company

Teamwork – Create a Cohesive Team

Don Minges, MBA, The Numbers Guy CFO, LLC

Teamwork is the ultimate competitive advantage both because it is so powerful and rare. Why do some teams produce and win, while others fail? What do great team leaders do that make the team a success? Whether you run the executive staff of a multinational company, a small department within a large organization or even if you are a team member in a team that needs improvement, we will share proven techniques to enhance teamwork. It is not complicated to build a team, but it is difficult.

Tell Me a Story

William F. O'Brien, MBA, CPA, Executive Education, Inc.



Everyone enjoys a good story. Stories create mental pictures, stimulate critical thinking and provide concrete examples of theoretical concepts. Learn to become a memorable speaker who can move, motivate and lead others through the craft of storytelling. Don't just simply relay your financial results. Discover how to mesmerize your company's audiences in a way that makes it easy for them to come away motivated for action that can improve their bottom-line. Remember, if the audience didn't get the message, you probably delivered it in an unmemorable way! Boost your business communication effectiveness through the medium of storytelling.

Working with Your Board and Audit Committee

John F. Levy, MBA, CPA, Board Advisory

The relationship between the CFO, the Board of Directors and the Audit Committee has changed forever. The Board is looking to the CFO and the finance and accounting department for more – more integrity, more honesty, more information and more strategic analysis. How do you meet these challenges? Your Board and Audit Committee are now better qualified and more independent. How do you tap into the knowledge and experience of your audit committee members? Veteran director and public company CFO, John F. Levy, will explain how to communicate effectively with your Board and Audit Committee and how to use them as competitive assets.

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

■ Manchester, NH



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