

High Level agenda

Day 1

- 7:45 – 8:30am: Breakfast
- 8:30 – 9:00am: Welcome
- 9:00 – 12:00pm: The Next Generation Accounting Firm
 - *presented by M. Darren Root, CPA, CITP, CGMA*
 - Define Your Business Model
 - Communicate Your Brand
 - Deliver Your Services
- 12:00 – 1:00pm: Lunch
- 1:00 – 2:30pm: Cloud Vs. On- premise: Where should your firm be?
 - *presented by Randy Johnston*
 - Understand the technology platforms in the industry
 - Examine the pros and cons of each platform
 - Select the right infrastructure for your firm
- 2:45 – 3:45pm: Building your Online Accounting & Payroll Business
 - Understand the value of working collaboratively with your accounting and payroll clients
 - Understand the structure of the online model
 - Create a plan to move your firm to an online model
- 4:00 – 5:00pm: Roundtables
 - Work in your Next Generation Accounting Firm workbooks
 - Talk with other attendees
 - Ask questions
- 6:00pm: Dinner

Day 2

- 7:45 – 8:30am: Breakfast
- 8:30 – 8:45am: Recap day 1 and ask questions
- 8:45 – 10:00am: Paperless Tax Process
 - Understand the value of the paperless tax process
 - Understand the process
 - Create a plan to implement or improve your tax process
- 10:15 – 11:15am: Roundtables
 - Create a 90 day game plan for your firm.
- 11:15am – 12:00pm: Tying it all together:
 - Combine a defined business model with your brand and website*