



**THRIVEAL**

**CPA NETWORK**

**Deeper Weekend 2013**

10/23 - 10/25

POPULATION  
750

THIS WAY TO  
THRIVE-VILLE

*Love Your Craft*



# How's this going to shake out?

Break it down for me

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# Agenda

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Welcome Reception	Wednesday	10/23/2013	Evening
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Leadership: There Ain't No App for That Speakers: Michelle Golden and Melinda Guillemette	Thursday	10/24/2013	All day
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Thriveal Birthday Party/Live THRIVEcast Recording with Jason and Greg!	Thursday	10/24/2013	Night
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Building a Consultative Firm Speaker: Joey Brannon	Friday	10/25/2013	Morning
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Various Thriveal Member Speakers	Friday	10/25/2013	Afternoon
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Finish	Friday	10/25/2013	4pm
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# Meet this year's speakers

They'll make your head explode ... literally  
(ok not literally, but still awesome)

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## Michelle Golden

Michelle is a growth and profitability strategist. With her deep knowledge of firm operations and sharp observation skills to quickly grasp a firm's nuances, she guides practitioners toward improved profitability and stronger, healthier cultures. She advises on and facilitates long- and short-term planning, positioning and pricing strategies, messaging, and communications (both online and off).

On the forefront of innovative practice management strategies, she is a senior fellow of VeraSage Institute, the think tank for advancing the professions. For her thought leadership, she's named among:

25 Most Powerful Women in Accounting by CPA Practice Advisor in 2012

Ten Most Powerful Women in Accounting in Accounting Today & WebCPA in 2009

Top 100 Most Influential People in Accounting by Accounting Today in 2010, 2011, and 2012

Top 25 Thought Leaders in Public Accounting Technology by CPA Practice Advisor in 2012 and 2013

Michelle is a skilled facilitator of meetings and retreats and holds the International Association of Facilitators Certified Professional Facilitator (CPF) designation, for which she re-qualifies every four years.

She's helped more than 100 firms achieve results such as: doubling revenue, attracting top talent, aligning operations with long-term objectives, effectively communicating their differentiation, substantially increasing sales and proposal results, new product development and launch, and strengthening firms' relationships with their clients.

Michelle provides practice management counsel as well as facilitates problem resolution and the development of processes. She leads strategy development and she teaches pricing techniques, marketing (niche and individual) planning methods. Most importantly, she inspires partners and team members to find more enjoyment in their work together so they can flourish as individuals and as a firm. As a professional facilitator, Michelle brings groups to paths of progress in a constructive way.

Her 25+ year career background includes roles as in-house marketing director in a 400-person law firm and an 80-person CPA firm. Before marketing professional firms, Michelle was an accountant with two public healthcare companies.



## Melinda Guillemette

Since 1991, Melinda has been helping professionals find, create and sustain relationships by communicating more effectively. Through her speaking and consulting engagements, business people learn to communicate intentionally, authentically and clearly. Melinda has coined this approach P.A.C.T. and has written about and recorded a video on the topic.

Speaking, facilitation and training are her passions. Part comedian, part educator and part group therapist – Melinda’s style is relaxed, witty and informative. She has addressed the American Institute of Certified Public Accountants (AICPA) Marketing Forum, the Conference for the Association of Accounting Marketing, the New Mexico State Bar annual convention, Polaris International Group of Accounting Firms, The International Accounting Group, CPASNET, CPA America, and a host of law and accounting firms.

In 2004, Melinda was inducted into the Association of Accounting Marketing Hall of Fame.

As founder and principal of Melinda Markets, a marketing consultancy, Melinda directed the internal and external communications for her clients. In due course, Melinda came to understand that communication was more than a marketing issue. It was a critical component of business. Her practice focused on behavior-based and communication-based marketing that transformed businesses and the people working in them.

For over a decade, Melinda played an integral role in the growth and success of a leading New Mexico public accounting firm. During her involvement, the organization grew from \$700,000 to \$11 million in annual revenues, and from 12 to 110 employees. Melinda guided the firm’s marketing and communication efforts through two mergers and one acquisition. Both her individual clients and her audience members come away from their time together with enhanced communication skills that help them develop business and operate more profitably. They are motivated to find their voice and more accurately hear the messages around them. The result is successful human interaction, healthier organizations and greater joy.



## Joey Brannon

Since Joey was a old enough to mow lawns and get paid for it, he knew that he would own a business. In 2005 that day came and he left a large, 100 person CPA firm to start his own shop. Joey still didn't want to be a CPA so he tried very hard to do things that no other CPA would do. Joey did not charge by the hour.

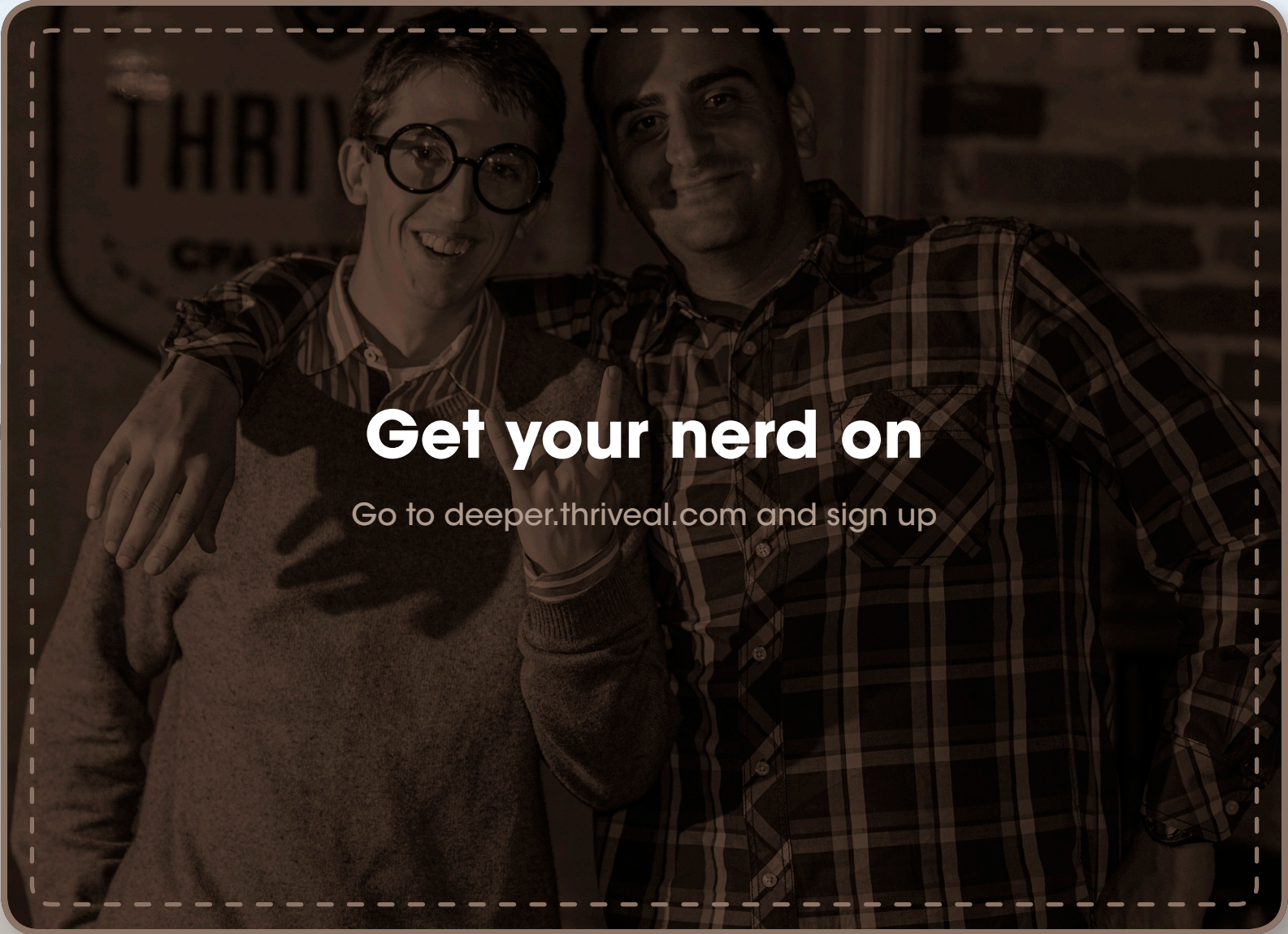
Joey chose not to be independent. He told prospects that he was interviewing them, not the other way around. Joey had some successes, but he learned a lot more from the failures. He took on too much debt. Joey hired people too early and fired people too late. He gave business owners good advice that he didn't follow himself. Over seven years his little firm evolved...until the day he sold it.

Joey believes that business done well is a wondrously creative act. He also believes it has a greater potential for positive impact on the world than anything else we do on a daily basis. That is why Joey has always been more interested in what a business is going to do next than he has been in accounting for what it has already done, to the last debit and credit.

Over the years more and more of Joey's work revolved around strategic planning and execution with businesses. In 2012 Joey sold the tax and accounting firm so he could focus his creativity and energy on bringing strategy and sound execution to small businesses (\$2 - \$20 million in revenue).

CPA's are uniquely suited for helping businesses grow. CPA's have greater financial acumen, better understanding of the inner workings of the business, and the ability to develop better metrics than almost anyone else in the professional arena.

So why don't we do this important work? No one has told us how... until now.



# Get your nerd on

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