



# ZWEIG GROUP'S

## Successful Successors Roundtable

Zweig Group's two-day Successful Successors Roundtable is an exclusive event for incoming strategic leaders of firms and newly-minted strategic leaders of these firms. The purpose of this seminar is to discuss the highest-level issues facing newcomers to the c-suite and to individuals who are preparing to take on a high level management role in today's AEC firm. This two-day event includes educational and networking sessions in an upscale setting. The discussion format will be round table, with half an hour devoted to each topic. We will incorporate best practice tips from Zweig Group and AEC industry data from Zweig Group surveys.

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### PROGRAM OVERVIEW

**Alignment and prioritization** – Strategy execution can't happen without focus and prioritization. How do you decide where to invest your effort? How do you get comfortable not being in the minutiae while also being accountable for the results?

**Time management** – How do we focus with new and competing priorities? How much time should a successor spend with clients, with staff, recruiting, in meetings, etc.? How do you step up to a new role and delegate responsibilities? How do you take control of your schedule and achieve work/life balance?

**Perfecting the hand-off** – What should an outgoing leader do differently once a successor is identified? How do they decide who handles things without stepping on each others' toes? What are the challenges when personalities are different, strengths and weaknesses of each person are different, and when leadership and management styles are different?

**Leading the team** – How do you build a team, and how do you develop and manage that team? How do you build your own personal brand? How do you seek out feedback and weigh your own effectiveness as a leader? How do you get buy-in from internal stakeholders and manage relationships, politics, and image?

**Building your successor** – Every person in a leadership role needs to be able to identify and mentor their own successor. How do we identify that person? When do we tell them? How much time do we need to build up that person? How do we build up that person, work effectively with them, and transition duties over?

**Building the firm of the future** – How do you manage firm growth and lead change? How do you evaluate different paths to that growth? How do you evaluate your risk tolerance and build confidence in making changes? How does a succession transition impact staffing needs that bolster the firm long-term? Organizational structure, specific role definition, meeting structure, board structure, etc.

**A shoulder to lean on** – Who do you talk to and bounce ideas off of? Where do you go for advice? How do you continue to learn and evolve as a leader?

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### SCHEDULE OF EVENTS

**Day 1:** 6:00 pm – 8:00 pm – Welcome Meet & Greet Cocktail Party

**Day 2:** 9:30 am – 5:00 pm – Two 1/2 day tours with lunch

6:30 pm – 8:30 pm – Successor Roundtable Kick-Off Dinner

**Day 3:** 8:00 am – 3:00 pm – Successor Roundtable Discussions

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### CONTACT

Zweig Group Events  
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