

schedule at a glance

WEDNESDAY • OCTOBER 2, 2019

- 7:30 AM – 4:30 PM** **M&A NEXT SYMPOSIUM** *(pre-conference event requiring separate registration)*
This highly interactive day-long “conference-in-a-conference” is designed to provide M&A education and practical application through interactive roundtable discussions, expert panel conversations, and focused networking to connect leaders from across the country.
- Panelists include: Paul Greenhagen, Westwood Professional Services; Darin Anderson, Salas O'Brien; George Christodoulo, Lawson & Weitzen; Scott Wallington, GEI Consultants; Jose Revuelta, Montrose Environmental Group, Inc.; Peter Devereaux, HED; and Joe Boyer, Atlas Technical Consultants
- 6:00 PM – 8:00 PM** **Welcome Reception**

THURSDAY • OCTOBER 3

- 7:30 AM – 8:30 AM** **Breakfast & Registration**
- 8:30 AM – 9:15 AM** **STATE OF THE INDUSTRY**
Chad Clinehens, PE, President & CEO – Zweig Group
- 9:15 AM – 10:00 AM** **KEYNOTE PRESENTATION**
Z-TALK: Zen, Life, Business: Kaizen/Lean Process in Your Life and Business
Kit Miyamoto, CEO – Miyamoto International
- 10:30 AM – 11:30 AM** **BREAKOUT SESSIONS**
- Qualifiers and COAs: Understanding Connections, Mitigating Risks**
Christian Haring, Account Executive & John Beck, Director – Harbor Compliance
- Congress' Definition of R&D: Why Designers Qualify for Research Tax Credit**
Dawson Fercho, Co-Founder – Corporate Tax Advisors
- Change Management is Vital to Technology Implementation**
Chas Ross-Munro, Professional Service Consultant – Cosential
Courtney Kearney, CPSM, Founder & Owner – CKearning Consulting
- How Progressive A&E Leaders Create Higher Profits & Happier Employees**
June Jewell, President & CEO – AEC Business Solutions
- Compensation in a Tight AEC Labor Market: From Salaries to Incentives to Perks**
Will Swearingen, Director, Ownership Transition – Zweig Group
- 11:30 AM – 1:00 PM** **AWARDS LUNCH & KEYNOTE**
Rising Stars & Top New Venture Awards
- How to Bridge the Gap Between Technology and Culture**
Shafat Qazi, CEO & Founder – BQE Software
- 1:15 PM – 2:15 PM** **BREAKOUT SESSIONS**
- After the Ink Dries: An M&A Integration Conversation**
Jamie Claire Kiser, Managing Principal & CFO – Zweig Group (Moderator)
John “Ozzie” Nelson, Jr., Chairman & Co-CEO – NELSON
Dickerson Wright, Chairman & COE – NV5 Global
- Answers You Should Know to the Top 10 Valuation & Ownership Transition Questions**
Tracey D. Eaves, Consultant, Valuation Services – Zweig Group
Will Swearingen, Director, Ownership Transition – Zweig Group
Pat Stoltz, Group Sr. VP & Managing Director – Wintrust
James Swabowski, Sr. VP – Wintrust
- Dollars for Design: Optimizing Tax Incentives for AEC**
Brady Bryan, Founder & CEO, – BRAYN Consulting, LLC
- Elevating Your Employee Recruiting & Retention Strategy Workshop**
Jen Newman, Managing Director – Zweig Group
Doug Parker, Managing Director & CMO – Zweig Group
- Bring Clarity to Your Key Performance Indicators**
Understanding Your Firm's Metrics and Why They Matter to You
Megan Miller, CPSM, Product Marketing Manager – Deltek
- 2:45 PM – 3:45 PM** **BREAKOUT SESSIONS**
- The Future Of Professional Land Surveying**
Jamie Claire Kiser, Managing Principal & CFO – Zweig Group (Moderator)
Bob Hanson, Vice President – WGI
Paul Greenhagen, President & CEO – Westwood Professional Services
Jill Souter, Project Manager – Landpoint
- Preventing and Reversing Burnout in You and Your Organization**
Pete Atherton, PE, President & Founder – Actions Prove
Chad Coldiron, Director, Executive Search – Zweig Group
- Organizational Nervous System**
Delrae Bennett, Senior Technical Consultant – Time Counts, LLC
- Using Data to Create Change**
Christy Zweig Niehues, Director, Research & E-Commerce – Zweig Group
- Strengthening Our Strategic Thinking Muscles to Become Better Leaders**
Jeff Hurt, Chief Epiphany Officer – Empowered Epiphanies
- 4:00 PM – 5:00 PM** **KEYNOTE PRESENTATION**
If You're Not Moving Forward... You're Moving Backward: A Disciplined Commitment to Sustainable AEC Growth
Bill McConnell, PE, JD, MSCE, CDT, CEO – Vertex
- 5:00 PM – 6:30 PM** **Networking Reception**

FRIDAY • OCTOBER 4

- 6:30 AM – 7:30 AM** **Sunrise Yoga**
- 7:30 AM – 8:30 AM** **Breakfast & Registration**
- 8:30 AM – 9:45 AM** **KEYNOTE PRESENTATION**
Living Your Purpose: Mission Driven Brands
Jackie Dryden, Chief Purpose Architect – Savage Brands
Catherine Harris, Chief Purpose Activator – Savage Brands
- 10:00 AM – 11:00 AM** **BREAKOUT SESSIONS**
- ElevateHer | A Discussion of Diversity in the AEC Industry**
Jamie Claire Kiser, Managing Principal & CFO – Zweig Group
Christy Zweig Niehues, Director, Research & E-Commerce – Zweig Group
Sepi Saidi, CEO – SEPI
Lisa Kay, President – Alta Environmental
- Cyber: Is Your Coverage Structurally Sound?**
Joseph Garin, Partner – Lipson Nelson, PC
Alex Ricardo, Director Business Development, Cyber & Executive Risk – Beazley Insurance
Lori Wheeler, Managing Director – Marsh Wortham
Regan Katz, Managing Director/Senior Sales Leader – Marsh Wortham
- Smart Growth through Knowledge Management**
Kara Clower, Business Manager/Integrator – LACO Associates
Susan Strom, Director of Client Success – Knowledge Architecture
- From Turnovers to Touchdowns**
Score More Work Through a Strategic Business Development Approach
Jen Newman, CPSM, Managing Director – Zweig Group
Joy Guinn, FSMPS, CPSM, Consultant, Marketing & BD Services – Zweig Group
- Elevating Strategic Planning: Recession Proofing, Next Practices, and Leading with Purpose**
Phil Keil, Director, Strategic Planning – Zweig Group
- 11:15 AM – 12:00 PM** **KEYNOTE PRESENTATION**
The Innovator's DNA
Jeff Hurt, Chief Epiphany Officer – Empowered Epiphanies
- 5:00 PM – 9:00 PM** **AWARDS RECEPTION & GALA**
- 9:30 PM** **AFTER PARTY**
“THE BEATLES LOVE” Cirque du Soleil
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* content subject to change

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ABOUT THE CONFERENCE

The Elevate AEC Conference & Awards Gala is the AEC industry's premiere experience to connect global leaders, solve industry issues, present next practices, and celebrate the most successful firms in the built environment. This year, the Elevate AEC Conference & Awards Gala marks a leap in the evolution of Zweig Group's annual event with expanded educational offerings including the M&A Next Symposium; a full-day designed to provide practical application on current and next practices in the world of mergers and acquisitions.



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