

# schedule at a glance

## WEDNESDAY • OCTOBER 2

**7:00 AM – 5:00 PM Registration**

*Location: Grand Ballroom Foyer*

**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.

*Location: Del Mar I & Del Mar II*

**6:00 PM – 8:00 PM Welcome Reception**

*Location: Opium Terrace*

## THURSDAY • OCTOBER 3

**7:30 AM – 5:00 PM Registration**

*Location: Grand Ballroom Foyer*

**7:30 AM – 8:00 AM Breakfast**

*Location: Del Mar I & Del Mar II*

**8:30 AM – 9:15 AM STATE OF THE AEC INDUSTRY**

*Chad Clinehens, PE, President & CEO – Zweig Group*

*Location: Grand Ballroom*

**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*

*Location: Grand Ballroom*

**10:30 AM – 11:30 AM BREAKOUT LEARNING SESSIONS**

**Session 1: Qualifiers and COAs: Understanding Connections, Mitigating Risks**

*Christian Haring, Account Executive – Harbor Compliance*

*John Beck, Director – Harbor Compliance*

*Location: Del Fuego*

**Session 2: Congress' Definition of R&D: Why Designers Qualify for Research Tax Credit**

*Dawson Fercho, Co-Founder – Corporate Tax Advisors*

*Location: Del Sol*

**Session 3: Change Management is Vital to Technology Implementation**

*Chaz Ross-Munro, Professional Service Consultant – Cosential*

*Courtney Kearney, CPSM, Founder & Owner – CKearning Consulting*

*Location: Del Mar II*

**Session 4: How Progressive A&E Leaders Create Higher Profits & Happier Employees**

*June Jewell, President & CEO – AEC Business Solutions*

*Location: La Estrella*

**Session 5: Compensation in a Tight AEC Labor Market: From Salaries to Incentives to Perks**

*Will Swearingen, Director, Ownership Transition – Zweig Group*

*Wendy Culver, Chief Human Resources Officer – Mead & Hunt*

*Laura Nick, Corporate Communications Leader – Garver*

*Wendi Prange, Director of Talent Development – Lawrence Group*

*Location: Del Mar I*

**11:30 AM – 12:30**

**AWARDS LUNCHEON**

**Rising Stars & Top New Venture Awards**

*Location: Grand Ballroom*

**12:30 – 1:00 PM**

**KEYNOTE PRESENTATION**

**How to Bridge the Gap Between Technology and Culture**

*Shafat Qazi, CEO & Founder – BQE Software*

*Location: Grand Ballroom*

**1:15 PM – 2:15 PM**

**BREAKOUT LEARNING SESSIONS**

**Session 1: 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*

*Location: Del Mar I*

**Session 2: 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 Senior VP & Managing Director – Wintrust*

*James Swabowski, Senior VP – Wintrust*

*Matt Doucet, Senior VP – Wintrust*

*Location: Del Fuego*

**Session 3: Dollars for Design: Optimizing Tax Incentives for AEC**

*Brady Bryan, Founder & CEO, – BRAYN Consulting, LLC*

*Location: La Estrella*

**Session 4: Elevating Your Employee Recruiting & Retention Strategy Workshop**

*Jen Newman, Managing Director – Zweig Group*

*Doug Parker, Managing Director & CMO – Zweig Group*

*Location: Del Sol*

**Session 5: 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*

*Location: Del Mar II*

**2:45 PM – 3:45 PM**

**BREAKOUT LEARNING SESSIONS**

**Session 1: The Future Of Professional Land Surveying Panel Discussion**

*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*

*Location: Del Mar I*

**Session 2: Preventing and Reversing Burnout in You and Your Organization**

*Pete Atherton, PE, President & Founder – Actions Prove*

*Chad Coldiron, Director, Executive Search – Zweig Group*

*Location: Del Sol*

**Session 3: Organizational Nervous System**

*Delrae Bennett, Senior Technical Consultant – Time Counts, LLC*

*Ashley Anne, Owner – Lotus Healing, LLC*

*Location: La Estrella*

**Session 4: Using Data to Create Change**

*Christy Zweig Niehues, Director, Research & E-Commerce – Zweig Group*

*Location: Del Fuego*

**Session 5: Strengthening Our Strategic Thinking Muscles to Become Better Leaders**

*Jeff Hurt, Chief Epiphany Officer – Empowered Epiphanies*

*Location: Del Mar II*

**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*

*Location: Grand Ballroom*

**5:00 PM – 6:30 PM**

**Networking Reception**

*Location: Exhibit Hall*

## FRIDAY • OCTOBER 4

**7:30 AM – 8:00 AM Breakfast**

*Location: Del Mar I & Del Mar II*

**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*

*Location: Grand Ballroom*

**10:00 AM – 11:00 AM BREAKOUT LEARNING SESSIONS**

**Session 1: 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*

*Location: Del Mar I*

**Session 2: Cyber: Is Your Coverage Structurally Sound?**

*Hector Sepulveda – Supervisory Special Agent, FBI*

*Lori Wheeler, Managing Director – Marsh Wortham*

*Regan Katz, Managing Director/Senior Sales Leader – Marsh Wortham*

*Robert Hughes, Senior Vice President, Partner – Ames & Gough*

*Location: Del Mar II*

**Session 3: Smart Growth through Knowledge Management**

*Kara Clower, Business Manager/Integrator – LACO Associates*

*Susan Strom, Director of Client Success – Knowledge Architecture*

*Location: La Estrella*

**Session 4: 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*

*Location: Del Sol*

**Session 5: Elevating Strategic Planning: A Discussion on Leading with Purpose, Next Practices, Recession Proofing, and the Future**

*Phil Keil, Director, Strategic Planning – Zweig Group*

*Amy Moen – Principal, HOK*

*Michael Davis – CSO, WGI*

*Jered Morris – SVP, Olsson*

*Location: Del Fuego*

**11:15 AM – 12:00 PM CLOSING KEYNOTE PRESENTATION**

**The Innovator's DNA**

*Jeff Hurt, Chief Epiphany Officer – Empowered Epiphanies*

*Location: Grand Ballroom*

**5:00 PM – 6:00 PM**

**Red Carpet Reception**

*Location: Grand Ballroom Foyer*

**6:00 PM – 8:00 PM**

**Black Tie Awards Gala & Dinner**

*Location: Grand Ballroom*

**9:00 PM**

**After Party Show "THE BEATLES LOVE" Cirque du Soleil**

## Thank You to Our Sponsors



### 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.

