



Venue: Scottish House Board Room
Australia Club: Level 4, 90 William Street, Melbourne

ATL Network Conference – Day 1

12.00 pm – 5:30pm

Dress Code

Conference: Business Casual

VIP Dinner: Mandatory Jacket and Tie for gentlemen. Lounge Suite or Black Tie optional. No Denim.

Reminder:

Avoid interruptions throughout our workshop, ensure your phones are switched off and show professional respect (language, etc.) to other attendees at all times (refer to Charter for our group).

12.00 pm – 12.45 pm

Working Lunch and Conference introduction

12.45 pm – 2.45 pm

Hot Seat

Facilitator: Colin Simkin

Members will walk through their strategic plans with Q&A from other Members. This session provides insight into some of the strategic thinking of practices and how they are dealing with different issues within their practices.

2.45 pm – 3.00 pm

Afternoon Tea

3.00 pm – 4.00 pm

External Speak Alliance Partner

Speaker: TBA

TBA

4.00 pm – 5.30 pm

Leadership – People Management – Communication

Facilitator: Warwick Cavell

Accounting practices are going through unprecedented change. Digital disruption and changes to the Financial Planning legislation are two key drivers of change. These are creating changes in the business model of the accounting profession. In periods of rapid change and turmoil it is often the rest of the team that is left in the dark to languish.

- How are you managing change and how are you bringing your team along with you?
- What are the stages in change and how do you manage people through these? What are the risks?
- How do you build a high performance team?
- Are your performance appraisals doing you damage?

In this session we will discuss practical challenges your firm is facing and explore some 'best practice' ideas to address the issue of change and managing performance.

5.30 pm

Close

5.30 pm – 6.30pm

Pre-Dinner Drinks: Library

6.30 pm – 10.00pm

VIP Dinner: Domino Room



Venue: Scottish House Board Room
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ATL Network Conference – Day 2

9.00 am - 5.00 pm

Dress Code

Conference: Business Casual

Dinner / AFL: Casual

Reminder:

Avoid interruptions throughout our workshop, ensure your phones are switched off and show professional respect (language, etc.) to other attendees at all times (refer to Charter for our group).

8.30 am – 9.00 am

Coffee on arrival

9.00 am – 10.30 am

Groups Discussion: Solving Practice Issues

Facilitator: ATL

Three key practice issues will be identified, dissected and discussed with recommendations formulated using business advisory tools.

10.30 am – 10.45 am

Morning Tea

10.45 am – 11.45 am

External Speak Alliance Partner

Speaker: TBA

TBA

11.45 am – 12.30 pm

Practice Efficiency: Part 1: Advisory Service Fees / Charges.

Facilitator: ATL

This session will provide an industry context to fees and charges and review some charging models to consider in the context of your practice. We will look at specific practices advisory fees, what is the right model for your practice and how do you move a practice to Service Agreements?

12.30 pm – 1.15 pm

Lunch

1:15 pm – 2.45pm

Practice Efficiency: Service Agreements and Write ons

Facilitator: ATL

This two part session will provide a forum to explore different issues around fees, charges, service agreements and write-ons. We will aim to address some of the following issues:

- How do implement service agreements?
- What should be contained within your service agreement?
 - Scope and Non Scope work
- How do you manage expectations with existing versus new clients?
- Do you provide options for your client?
- How do you engage your team?
- What are the structures you have in place to ensure team engagement and ownership?
- Other practical issues

2.45 pm – 3.00 pm

Afternoon Tea

Venue: Scottish House Board Room
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3.00 pm – 5.00 pm

Building revenue growth and referrals through client centric service

Facilitator: ATL

Accountants seem to have no trouble referring work to solicitors and financiers – they have been doing it for many years – yet often they often struggle to refer work into (their own) Financial Planning. Why is this? How can this situation be corrected?

In this session we explore the experiences of members in developing and growing Financial Planning services.

- What are the causes of this problem?
- How do we address the problem?
- Why won't referral training work?
- How do we develop our team to understand Financial Planning?
- What is the role of checklists?
- How do we develop our team to have the right conversation?
- Let's look at it from a client's perspective.

How do you make sure any additional advisory services you offer are part of an integrated offering? What are the implications for other advisory services you may wish to add to your suite of services?

5.00 pm – 7.30 pm

Pre-game Dinner

7.30 pm – 11.00 pm

**AFL Game: St. Kilda V Essendon (7.50pm)
Etihad Stadium**