

The Business of Our Business

Focus on the Future: 2022 APC Virtual Forum • January 27-28

SCHEDULE OF EVENTS

PT = Pacific Time MT = Mountain Time CT = Central Time ET = Eastern Time

Thursday, January 27

9:00PT / 10:00MT / 11:00CT / 12 Noon ET

Welcome & Warm-Up: David Coyne, The Sheridan Group, APC Chair, and
Melanie Norton, CFRE, 2022 Winter Forum Chair

9:20PT / 10:20MT / 11:20CT / 12:20ET

Speed Dating with a Sponsor #1

9:30PT / 10:30MT / 11:30CT / 12:30ET

OPENING KEYNOTE PRESENTATION:

Five Pillars of Business

Dr. Stevie Dawn, CEO

Stevie Dawn Inspires, LLC

Being a business owner can be overwhelming. There is so much to do in areas that are not your strength. You became a consultant to serve, yet you also have to worry about invoicing, contractors and sales. Building a successful business requires you to work not only *in* your business, but also *on* your business. In this session, we will examine the Five Pillars of Business that you should be reviewing on a regular basis to ensure stability and growth. Participants will learn to:

- Identify the Five Pillars of Business and their impact
- Ask questions to discover pitfalls and obstacles
- Implement a business retreat process to keep your sanity and profit



As a motivational speaker and coach, Dr. Stevie Dawn is focused on helping people to unleash unstoppable success in their lives both personally and professionally. Her experience as a 4-time business owner, along with her work in the private and public sector, allows her to enhance her presentations with real life stories and examples that are applicable to every audience. Her educational background includes a master's degree in sociology from Wichita State University and a doctorate in leadership from Colorado State University. With over 20 years of teaching and training experience, Dr. Stevie Dawn approaches every

engagement with humor, inspiration, and energy to get people moving towards their best lives.

10:45PT / 11:45MT / 12:45CT / 1:45ET

Speed Dating with a Sponsor #2

10:55PT / 11:55MT / 12:55CT / 1:55ET

BREAK

11:10PT / 12:10MT / 1:10CT / 2:10ET

Shop Talk Sessions: Exploring the Five Pillars of Business

Building on the concepts presented by keynote speaker Dr. Stevie Dawn Carter, these shop talk sessions give participants the opportunity to explore one of the five pillars in greater detail with other consulting colleagues. Spearheaded by a moderator, these sessions are designed for an interactive discussion led by participants. Bring your questions, issues, and suggestions and jump in for a deep dive!

- **Finance** – Moderated by Patti Ward
- **Operations** – Moderated by Clint Riley
- **Marketing** – Moderated by Michelle Crim
- **Business Development/Sales** – Moderated by Kristi Gallup
- **Vision** – Moderated by Diana Marquis

11:55PT / 12:55MT / 1:55CT / 2:55 ET

Speed Dating with a Sponsor #3

12:05PT / 1:05MT / 2:05CT / 3:05ET

PRESENTATION:

Thought Leadership for Philanthropic Counselors

Jeff Herrington, President

Jeff Herrington Communications

The people you hope to influence no longer read the way they did when you learned how to write. Or even the way they did just 10 years ago. In this session, Jeff Herrington will share several techniques that will make whatever thought leadership content you prepare more likely to connect with today's distracted readers. You'll walk away with a better understanding of the reader revolution that has taken place and how to respond to that revolution in your own thought leadership pieces, as well as any you produce for a client.



Early in Jeff Herrington's career, he edited one of the regional magazines published by the National Association of Purchasing Management, the alumni

magazine of Southern Methodist University, from which he earned his journalism degree, and the employee publications of Diamond Shamrock Corporation, an independent energy firm. Since then, he has traveled the world for companies like IBM, AT&T, Baxter Healthcare and United Technologies, writing articles for their employee and customer publications. Along the way, he's interviewed a prime minister of New Zealand, the CEO of Argentina's national oil company and France's leading heart surgeon. His consulting expertise and writing workshops have been sought out by Coca-Cola France, Whirlpool, John Deere, Phillips 66, the Federal Reserve Bank of Philadelphia and Intuit, among other organizations.

1:05PT / 2:05MT / 3:05CT / 4:05ET

BREAK

1:20PT / 2:20MT / 3:20CT / 4:20ET

Speed Dating with a Sponsor #4

1:30PT / 2:30MT / 3:30CT / 4:30ET

Shop Talk Take-Aways and Day One Summary

2:15PT / 3:15MT / 4:15CT / 5:15ET

Adjourn/Social and Happy Hour!

Friday, January 28

9:00PT / 10:00MT / 11:00CT / 12 Noon ET

Welcome & Forum Review/Preview: David Coyne, The Sheridan Group, APC Chair, and Melanie Norton, CFRE, 2022 Winter Forum Chair

9:10PT / 10:10MT / 11:10CT / 12:10 ET

Speed Dating with a Sponsor #5

9:20PT / 10:20MT / 11:20CT / 12:20ET

PRESENTATION:

"Normal" in the New Reality

Clyde Valentin, Inaugural Director

Ignite/Arts Dallas; SMU Meadows School of the Arts

As a thought-leader and social entrepreneur, Clyde Valentin has a front-row seat to the culture shift and intersection occurring among the arts, social justice, and the distribution of resources. The pandemic is just one disruptive factor that will impact not only the future for our clients, but also our consulting work and the ways in which we advise others.



This informative presentation is designed to shed light on the myriad of changes and challenges headed our way. Join us as Clyde leverages his multi-faceted experience to help forecast the realities emerging for the nonprofit sector and its leaders.

Clyde Valentin is the Inaugural Director of Ignite/Arts Dallas for the Southern Methodist University's Meadows School of the Arts. An experienced creative producer and director originally from New York City, Clyde is a thought-leader with a successful history of highly visible work in the entertainment, non-profit and higher education sectors. He is a renowned entrepreneur with a strong arts and design background, and his professional experience includes strategic work focused on organizational leadership, operations, and programming.

10:20PT / 11:20MT / 12:20CT / 1:20ET

Shop Talk Sessions: 1. Master Your Business Basics

Ellen Bristol and David Sternberg

This session covers the fundamentals for establishing a solid business foundation. What are the basics you need to manage for long-term success? How do you define or refine your areas of expertise, choose your team and partners, and develop your ideal customer profile? Join us for this informative session and set your business up to soar.

2. Consult for Maximum Impact

Jennifer McDonough

This session will focus on points of practice in successful nonprofit client acquisition, retention, and stewardship and in positioning and aligning our expertise, roles, methodologies, engagements, and deliverables with discernible and relevant outcomes. Join us and expand your consulting acumen and impact.

3. Ramp Up Your Business

Beth Hershenhart and Michael Rubin

Ready for the next step? This informative session covers the considerations consultants or firms might address when growing their business. How might factors like pricing and cost structures, team size/recruitment, and more enter the decision process? Can partnerships and collaboration play a key role in future opportunities? Join us and explore the issues most critical to taking your business to the next level.

4. Be Your Own Change Agent

Amy Rome and Abbie von Schlegell

The only constant in life is change, and that applies to your consulting practice as well. How do you navigate shifting business to stay relevant, motivated, and cast to the right clients and pipeline? What are the succession plan and exit

strategies you might employ as you consider moving to your next chapter? Whether a single consultant or large firm, this informative session is designed to empower you as your own change agent.

11:05PT / 12:05MT / 1:05CT / 2:05ET

Speed Dating with a Sponsor #6

11:15PT / 12:15MT / 1:15CT / 2:15ET

BREAK

11:30PT / 12:30MT / 1:30CT / 2:30ET

CLOSING KEYNOTE PRESENTATION:

Position for Profit

Dr. Stevie Dawn, CEO

Stevie Dawn Inspires, LLC

Being the "best kept secret" is never a compliment. As a consultant, you want to be known. You want to be sought-after for your experience. This requires that you position yourself as an expert. The first step is to delineate where your expertise lies. Since positioning requires a set plan of marketing actions, we must create an action plan to position ourselves for the profit we want in our business. In this session, participants will learn to:

- Identify their specific expertise areas.
- Position themselves in the market to stand out to their target audience.
- Develop a profit pyramid that allows them to make a joyful amount.



12:30PT / 1:30MT / 2:30CT / 3:30ET

Shop Talk Panel Review & Shop Tips

1:15PT / 2:15MT / 3:15CT / 4:15ET

Forum Wrap Up; Sponsor & Participant Thank You: David Coyne, The Sheridan Group, APC Chair, and Melanie Norton, CFRE, 2022 Winter Forum Chair

1:25PT / 2:25MT / 3:25CT / 4:25ET

ADJOURN