

# **CONFIA B**

**Program Guide**

**October 22-23, 2011**

**Saturday 4:00–5:00PM**



**Sa3: The CMC Mark—Creating Greater Visibility to Clients**

*Don Scellato*

*Location: GB1*

As a current or future CMC, you are invited to attend this session to learn what steps have been taken to date to make the CMC© certification relevant and more visible in the United States and worldwide. Participants will also share ideas and experiences where they have increased awareness and value within the consulting community and among their clients. Don will present the findings of the CMC-only meeting held in Orlando in March, 2011. Participants will discuss measures taken by current CMCs to make the CMC© more visible, as well as what actions they would like to see taken by IMC-USA and fellow CMCs to raise the value and visibility of the CMC mark. All who attend will share with other CMCs and prospective CMCs new ideas and find ways to successfully execute those ideas to increase the value of the CMC©.

About the Speaker: Don Scellato has served as Chapter Certification Chair for Northern California, National Certification Chair and Chair of the Certification Review Committee for IMC USA. Don and Clint Burdett together worked with ICMCI and ISO 17024 representatives to have the IMC USA Certification Process accredited by both parties. Don has also been involved in supporting the efforts of IMC USA national office and the National Capitol Region to have the CMC recognized by procurement offices within the federal government. He is devoted to raising awareness of the CMC to independent consultants, internal consultants, and consulting clients.

**Saturday 5:00-6:00PM**



**Sa5: BizTalk Blender ®---Get Connected to Jumpstart your Confab Experience**

*Alice Heiman*

*Location: Emerald Room*

Want to receive maximum benefit from your Confab investment? This session will enhance your ability to make meaningful connections to share ideas, enjoy the conference, and collaborate on future business opportunities. Alice Heiman kicks off Confab2011 with this powerful, highly interactive event. The BizTalk Blender ® ensures you will get the most out of Confab as you connect with other attendees in a series of relevant conversations in comfortable, small groups. The techniques easily transfer to building your own business relationships outside of Confab. You'll leave energized and ready to begin Confab. Don't miss this event!

About the Facilitator: For 20 years, Alice Heiman has been a catalyst for business relationships. As a sales expert, she helps companies grow by working with business leaders on strategies and tactics for increasing sales. Alice also delivers training programs for salespeople and sales management throughout the country. Included in her many awards are Saleswoman of the Year by Professional Saleswomen of Nevada, Marketer of the Year by the Reno-Tahoe American Marketing Associations and the Blue Ribbon Small Business Award from the U.S. Chamber of Commerce. She is a sought-after speaker at conferences, association meetings, and chambers of commerce and has appeared on radio and television. As an adjunct faculty for University of Nevada, College of Business, she teaches sales and business communications



### **SU2: Survive to Thrive: What's Different About Companies that Flourish in Recessions?**

*Dr. CJ Rhoads, M.Ed., D. Ed.*

*Location: GB5-7*

Why do some companies survive—even thrive—when the economy is in the tank? Are your clients still struggling with difficulties resulting from the financial crisis and ongoing poor economic performance? As consultants, knowing the key factors which contribute to long term success, can dramatically add to the value we offer our clients.

Dr. Rhoads, based upon the work of Jim Collins, author of Good to Great, is leading a team of researchers to address these questions. With a database of all public companies, they develop models to predict success or failure based on the Good to Great factors. CJ has identified those companies which have thrived during the previous six recessions over the past 50 years and what differentiates them from those that did not survive. You'll walk away with several new insights for your work with your clients, and be able to apply them to your own consulting practice as well.

CJ will offer her practical insights and implications from the research. She'll share what companies (and consultants) can do to ensure they will survive no matter how bad the economy gets or how long the recession lasts.

About the Speaker: Dr. CJ Rhoads is a consultant, author, and speaker on business strategy, leadership and technology topics. She is the Founder and CEO of the enterprise, technology and management consulting firm of [ETM Associates, Inc.](#) Dr. Rhoads is an Associate Professor in the College of Business at Kutztown University. At the Small Business Development Center at Kutztown University, she consults with entrepreneurs and small business owners, in addition to working with her larger clients in the finance and technology industries.

Dr. Rhoads' twenty five years of experience runs the gamut from successful technology startups to Vice President in Fortune 500 financial firms. Her work focuses on entrepreneurship, business strategy, leadership development, performance metrics, and information technology.

Among her many awards include Pennsylvania's Best 50 Women in Business. An author of several books and articles, she is Editor of The Entrepreneur's Guide to.....series

**Sunday 9:15-10:45AM**



**SU3: Consulting 101: 20 Lessons Learned in 20 Years of Consulting**

*Jennifer Leake, CMC*

*Location: GB1*

Each year, countless consultants either go out of business or make far less than they could. Yet they are not lacking in talent, skills, experience or motivation. Why do they fail—and could you be headed in that direction? This session is designed to address the challenges facing new or struggling consultants such as lack of clients (or servicing the wrong clients) and ineffective practice management. After all, this IS a business.

Jennifer will address many mistakes most consultants make early in their career, (or keep repeating year after year). She will share valuable lessons learned in the areas of: Creating the Right Mindset for Success; Marketing Yourself—from the client's perspectives, not yours; Selling your Services; Multiplying Yourself with Partners and Alliances – all while Staying the Course.

This is a “must attend” session for all new consultants or those who need to refresh and jump-start their practice. You will leave with new strategies, templates and actions to immediately impact your consulting practice.

About the Speaker: Jennifer is Founder/Chief Mining Officer of Consultants Gold. Her mission is to help consultants at all levels be more successful. This online membership community provides ideas, tools, support and accountability that consultants need to get more clients and bank more money.

In the past 20 years, family moves forced Jennifer to restart her consulting practice 4 times, in new towns with no connections. With each new start, she made fewer mistakes, became profitable earlier and began to see a pattern of why some consultants survive and flourish while others struggle and go out of business. Jennifer is the author of the Kindle book, *The Million Dollar Handshake: How to Introduce Yourself to a Million Dollars Worth of Consulting Business*, the e-book, *Finding the Gold: 7 Key Actions for Consulting Success*, and writes twice weekly tips, *Consultant's QUICK ACTION*.

As founder of Assessment Pros LLC, Jennifer works with managers to build better teams by using information to better hire, manage, understand and engage employees.

### **SU4: Knowledge + Curiosity + Guts = An Effective Communication Cocktail to Secure the Engagement**

*Manola Robison, CMC*

*Location: GB2-3*

Learn to craft conversations and successfully convert your proposals into paid work. Join Manola Robison in a highly interactive session to enhance your communication and interviewing skills. Then, when you meet with a prospective client, you will be able to gather the information which leads successfully to the engagement. You'll learn valuable tips and a powerful technique to help your prospective clients "find the money" needed for the project –"before" submitting your proposal. You will be able to apply these techniques to "any" conversation where you want to achieve positive results or avoid miscommunication.

During the session, as participants exchange their own experiences, Manola will share her insights on emotional tension and "bio-reactions". You'll hear about key factors critical to the success in getting the engagement, the importance of a healthy curiosity, and how various types of questions affect the listener. If you want to increase your engagement to proposal ratio, this is the session for you.

About the Speaker: Since 1992, Manola has worked with businesses to increase their profitability. She's demonstrated a proven, holistic approach to strategy, new business development, operations, sales, marketing and human resources which clients love. Manola has also facilitated workshops at the University of El Paso, Texas and been a keynote speaker for GWEN (Georgia Entrepreneur Women Network), the National Latina Women Business Association and Contractors 2000. Manola holds a BS degree, University of Kansas School of Architecture and Executive MBA, Georgia State University. She is past President of the Georgia Chapter, IMC.

**Sunday 9:15-10:45AM**



***Su5: The Simplicity & Power of Systems Thinking.....Providing Clarity,  
Simplicity & Speed in your Work***

*Stephen Haines*

*Location: GB5-7*

The Universal Thinking Guide with its simple ABCs of Systems Thinking could be the most valuable consultant tool you will ever have to guide you to achieve your ideal future vision and goals. In this powerful session, you'll learn how to determine the actions necessary to "close the gap" to achieve your desired outcomes using a simple, practical, and yet comprehensive tool. Useful on a daily basis on all personal and business issues to achieve superior and sustainable results, it also minimizes unintended consequences. Systems thinking is destination thinking.

During this session, each participant will be able to work through an important issue in their consulting practices using Stephen's ABC Template. In addition you will leave with many powerful techniques to use at both the strategic and tactical level. This will give you much greater clarity, simplicity and speed in your work.

About the Speaker: Stephen Haines is a 2011 inductee of the Association for Strategic Planning Hall of Fame, and founder and CEO of the Haines Centre for Strategic Management, which has offices in more than 25 countries and focuses on strategy management (Planning-People-Leadership-Change to deliver Customer Value) powered by Systems Thinking. Steve travels globally consulting with CEO's of progressive organizations, presents keynote addresses and facilitating CEO level seminars. He is a distinguished, prolific author with over 16 books in print and he established an entire Publishing Firm, Systems Thinking Press for his and his Global Partners over 500 Systems Thinking applications and products.

Stephen has led the Best Practices Research of Strategic Management and Systems Thinking for 30+ years as a CEO, Entrepreneur, and Global Strategist. A graduate of the US Naval Academy, he also holds a Masters in OD with completed Doctoral work in Educational Psychology

### **Su6: Making \$\$ and Sense out of Social Media**

*Ira Wolfe*

*Location: GB1*

What is social media really? How do I get started? What are the critical success factors in social media? Social media is everywhere and keep growing! Facebook has over 600 million users. Two billion YouTube videos are watched each day. 61% of U.S. households use social networks. In this session, you will gain a better understanding of the full scope of social media and most importantly, how social media can leverage its power to promote your business. You will also learn how social media technologies like Facebook, Twitter, LinkedIn, YouTube, blogs and more are changing the way businesses recruit, prospect, sell, and support employees and customers.

Ira will take you on a “tour” of several social media sites to highlight practical applications you can immediately put to use. A few highlights of the session include:

Recognize how social media is changing the way you do business

Identify strategic applications of social media for every business

Learn a 4-step approach to getting started with a social media strategy

How to avoid social media pitfalls and landmines

Practical, informative, and engaging, Ira demystifies Social Media and shows you how it can work for you and your business.

About the Speaker: Ira Wolfe is Founder and Managing Partner of Social Media Architects of Delmarva, a boutique marketing and public relations agency specializing in helping small business design, build, manage, and monitor search and social media marketing.

A prolific author, columnist, business blogger and sought-after-expert on hiring and workplace trends, Ira has been aptly described as a “Gen Y masquerading in a Baby Boomer body.” He was honored as one of the Top 25 Talent Management Online Influencers and selected by HRExaminer.com, Top #10 Bloggers by Toolbox by HR, and HCI 50 Best Blogs for Talent2011.

In 1996, Ira founded Success Performance Solutions (SPS), a pre-employment and leadership testing firm. Ira is a leader in the talent management industry and considered an expert in pre-employment personality tests, workforce trends, and social media.

Ira is the author of the new book Geeks, Geezers, and Googlization: How to Manage the Unprecedented Convergence of the Wired, the Tired, and Technology in the Workplace. His other books include The Perfect Labor Storm 2.0, The Perfect Labor Storm Fact Book, and Understanding Business Values and Motivators.

**Sunday 11:15AM-12:45PM**



**SU7: Consult with Grace: Facilitate with Style**

*Becky Roberts*

*Location: GB2-3*

Do you want to improve your facilitation techniques to ensure better results with your client engagements? As organizations become increasingly diverse, this workshop explores how to effectively use facilitation techniques to maximize inclusion, tap into each person's value, and ultimately achieve better results. In this workshop, not only will you improve your facilitation techniques, you'll learn how to plan and facilitate groups with a broad range of participants. You'll learn how to incorporate the diverse needs of participants in events and interactions; how to translate this knowledge to a broader population; and ways to maximize effectiveness at each stage of an event to guarantee a successful outcome.

About the Speaker: Becky Roberts is the President and CEO of Catocin Consulting, LLC. She uses facilitation and creative participatory processes to help customers achieve business results through strategic planning, performance measurement, process reengineering, change management and enterprise architectures. She strives to make a lasting impact for her customers, and have great fun while doing it!

Becky has over 25 years of experience in facilitation, organizational management, strategic planning, performance management, business process reengineering, team building, information resources management, software engineering, and systems integration for government and commercial organizations. Prior to founding Catocin, Becky served as Director of Business Process Reengineering with DynCorp. She has also held management positions with Oracle and PRC. She has spoken at and chaired conferences on strategic planning, IT capital planning, business process reengineering, performance management, facilitation and creativity. Becky has a BA in Architecture, Yale University and an Executive MBA, George Washington University.

**Su8: Discover the Rest of the Story - Awareness: The Key to Making Optimal Decisions***Bert Holeton**Location: GB5-7*

Have you (or your clients) been surprised to discover that you have been unaware of important factors relating to your critical issue consulting project? What impact did this have on your (or your client's) ability to optimally resolve the critical issue? Success hinges on the quality of the decisions made and the way in which they are implemented—and key decisions require awareness of all aspects of the critical issue. As consultants, our goal is to help our clients achieve optimal results, which comes from optimal decision making. In order to do that, we need to have full awareness and understanding of the factors surrounding the critical issue or project.

This highly interactive workshop explores the three key components of awareness—awareness of the problem or project that gets you in the door, awareness of the people involved, and awareness of the client's larger plan. You will learn how these three components comprise “all aspects” to more complete awareness and thus more optimal decisions.

Bert will share tools and techniques he uses to:

- Scientifically predict people's decision-making abilities
- Identify and resolve critical issues
- Ensure the attention is on the right issue in the first place
- Uncover and utilize the often undocumented strategies and plans required to achieve complete awareness.

Full awareness will empower you to make the best decisions, avoid costly mistakes, and resolve critical issues more effectively—thus helping you achieve greater results for yourself and your clients.

About the Speaker: For more than 30 years, Bert Holeton has created positive results for dozens of businesses throughout North America. Since founding The Mastermind Group, he has consulted in 14 industries and with companies ranging from start-up to Fortune 100. The Mastermind Group guarantees their work will yield dramatic results and a high return on investment for every client—whatever the problem, whatever the industry. The Mastermind Group's approach is to help clients become aware of all aspects of the critical issues and challenges that are preventing them from achieving their goals, and to empower clients with effective tools to resolve these issues going forward.



**SU9: The Next Decade's Evolution of the Management Consultant Profession***Oliver Matar, CMC**Location: GB4*

Do you know which key trends will impact your consulting success in the coming decade—and will you be prepared? Oliver Matar, an international consultant in Dubai, will share his fascinating, provocative predictions on the major trends impacting the management consultant profession. You will also learn a powerful process to identify critical interactions among trends, business environments and your own consultancy profession to ensure your long term success. Oliver will present the essential competencies consultants must master to compete and succeed within this evolving business climate. This is a don't-miss session!

About the Speaker: Oliver Matar, CMC is the Chairman of APT Facilitators, an international Management Consultancy firm established in Dubai 8 years ago. He has successfully managed over 60 large projects in 10 European and Middle Eastern countries in sectors including Government, Banking, Building Services, Trading, Retail and Manufacturing. He partners with clients to develop strategic plans, significantly improve productivity, and has worked with organizations to win the Dubai Government Excellence Award and the Dubai Quality Award. A highly sought after speaker worldwide, Oliver most recently presented "How will the Management Consultancy Profession Evolve during 2011-2020" at the University of Strathclyde, Glasgow, UK.





**Sunday 3:15-4:45PM**

**SU11: In Your Client's Mind—Are you a "Vendor" or a "Trusted Advisor"?**

*Jodi Cicci*

***Location: GB1***

As consultants, we can be engaged as a vendor – someone who is dispensable and almost viewed as a commodity. OR, we can be trusted to truly help our clients turn to us to understand their business, to discover their challenges in the organization, and to identify the human factors required for successful change. In both, we assist our clients with advice, design and implementation of best practices or provide a solution to a challenging problem to improve their business. One role creates short term interactions; the other, long term, sustainable business relationships.

In this session, you will learn how to shift your relationship from a vendor to a successful trusted advisor. You'll hear how to get into the mind of the client by understanding their business, how to identify trouble spots in the organization which may not yet be apparent to the client, and when to introduce change and handle it effectively. Jodi will share techniques to identify and handle the consulting situation; ask tactical questions to obtain strategic information; and identify options and make recommendations at just the right time.

About the Speaker: Jodi Cicci is President/CEO of TOP Step Consulting LLC where she works with professional services organizations to become operationally efficient by establishing standard business practices and deploying automation tools. Working with her clients, Jodi recognizes that business understanding and how the business runs is always first before technology. A core principle Jodi has put in place at TOP Step Consulting is to ensure customers have the knowledge and information necessary to be successful. Jodi was awarded the 2010 and 2011 Services Organization Best of the Best from SPI Research, as well as being a TSIA (Technology Services Industry Association) Alliance Partner.

**Sunday 3:15-4:45PM**



**SU12: Value Client Relationships. Drive Profit. And Thrive.**

*Linda Sharp*

*Location: GB2-3*

What clients would you want more of and why? What makes a client profitable and what is their potential for profitable growth? What consultant relationships do clients value and why do clients buy, stay, or leave?

In this interactive session, Linda Sharp will share her insights and invite you to share yours on questions like these to help you achieve exceptional results. Her contention is your best potential clients are most likely among those you have already—if you pay attention to some client fundamentals.

Linda will show you how to immediately apply her winning advice to: 1) Listen to clients you'd like more of; 2) segment by profitability; and 3) do what creates value for your clients—and stop doing what doesn't. Consultants who do will value their client relationships, drive profit, and thrive.

About the Speaker: Linda Sharp is CEO of Religence, a customer-focused performance management consulting firm specializing in the Religence Framework for CRI (Customer Relationship Intelligence). Linda has run her own consulting firms for more than 30 years, observing success in marketing with a mathematician's eye. Her insight, captured in her CRI patent and in the Religence Framework, links strategic planning to operational execution and customer relationship metrics to profitability.

A sales and marketing innovator and integrator, Linda was well ahead of the movement to customer-centric thinking, having pioneered the use of Voice of the Customer research. By focusing on the customer and profit, her teams have helped clients do significant business even in the midst of economic downturns. Her firm has helped a technology company build a billion-dollar business in the 80s, an environmental engineering firm double its business in three years in the 90s, and an insurance company turn around—from years of shrinking market share—to growing by 80% during the current Great Recession.

Learn more about her ideas in her new [book Customer Relationship Intelligence: A Breakthrough Way to Measure and Manage Sales and Marketing.](#)

Linda is also a thought leader and pioneer in strategic alliances. She founded the Strategic Partnering Special Interest Group in the Institute of Management Consultants (IMC) in 1995. With her colleagues, she wrote a comprehensive practical guide to ethical and responsible practices for people working together in successful strategic alliances.

### **SU13: Sell Smart: Sell Successfully! How to Build a Professional Service Business....Naturally!**

*Jim Horan*

*Location: GB5-7*

With the extended recession, the trend towards self-employment for professionals, managers and executives remains strong. The US Bureau of Labor Statistics reports there are approximately 500,000 management consultants in the U.S. and the profession is growing at the rate of over 20% annually. What they did not report was that 499,999 of those management consultants would rather go have root canals than make a sales call. Sales and marketing is a dreaded nuisance for most consultants.

If you hate sales and marketing...this session is for you!

Jim Horan, President/Founder of The One Page Business Plan Company and author of the million-dollar best-selling The One Page Business Plan® book series will share how he built his business and financial consulting practice into a successful global company using non-stressful sales and marketing techniques.

In this session you will learn simple, highly effective selling processes that will help you Sell Smart, and Sell Successfully every time! Topics include:

- How to ask provocative discovery questions to determine what is the “real” reason prospective clients are looking for external assistance.
- How to create “prepackaged, bundled service offerings” that reflect your extensive knowledge and expertise, making it easy for prospects to say YES to you.
- Learn how to move to value-based offerings and help you move your sales to six figures and beyond – without feeling like a used car salesman.
- Learn how to minimize “sticker shock” with “initial trial” engagements.

About the Speaker: Jim Horan is an experienced Fortune 500 executive, small business expert, advisor to non-profits, consultant, author/publisher and speaker. He is President/CEO of The One Page Business Plan Company ([www.onepagebusinessplan.com](http://www.onepagebusinessplan.com)), a recognized leader with its innovative planning and performance management products, software and consulting services. For over 19 years, his company has helped over 250,000 entrepreneurs, business owners and executives start, grow and expand their businesses using the power and simplicity of The One Page Business Plan®. His company has helped over 10,000 non-profits create clear, concise, actionable plans which enable them to deliver their mission and keep their promise. The One Page Business Plan for the Creative Entrepreneur book, published in 1997, quickly became, and remains today an Amazon.com best-seller. Other books include: *The One Page Business Plan for the Professional Consultant*; *The One Page Business Plan for Non-Profit Organizations*; *The One Page Business Plan for the Financial Service Professional*; *The One Page Business Plan for Women in Business*; and *The One Page Business Plan for the Busy Executive*. The company market, sells, and delivers its products, training, and consulting services through its 500+ senior consultants.



### **SU14: Laughter – The Secret Weapon of Great Consultants**

*Jim Pelley*

*Location: GB4*

Cocktails, dinner, and entertainment: 6:00 – 8:45

Today's business challenges can make Hannibal's trip over the Alps seem like a romp in the park. The conflicting pressures of lightning-speed technological advancement, diverse and multicultural client needs, and an unpredictable, often unfathomable global economy can leave even the best consultants feeling buffeted like dinghies in a hurricane. What's so funny about that?

While you enjoy Jim Pelley's hilarious way of poking fun at the frustrations of everyday life, you will also:

- Discover how laughter and humor can work to your advantage when dealing with the seemingly unfunny business of consulting
- Learn how flexibility and responsiveness are critical qualities for thriving in a world of ever-accelerating change
- Find out how the successful use of humor can reduce stress, build morale, and help you lead others through difficult times of change
- Develop the skills of a successful problem-solver by using creativity, humor, and divergent thinking to make positive changes within your client or your own organization

About the Speaker: A former stand-up comedian and contributing writer for the original Saturday Night Live Show, as a speaker Jim Pelley has left 'em laughing for more than 24 years at more than 2,156 top organizations in the U.S. and abroad, including Disney, Intel, Southwest Airlines, Mattel, and AT&T. He's brought his message of how to smarten up by lightening up to hundreds of thousands of people who are high-tech, low-tech, and no-tech-at-all. With his hilarious way of poking fun at the frustrations of everyday life, Jim demonstrates uproariously how to use humor to become more creative, more productive, and less stressed. Jim is a "three-peat" Confab speaker who has received rave reviews!



### **Mo2: What Clients (or Prospects) Don't Tell You.... Honest Insights from Executives who Engage Consultants**

*Moderator: Dick Pinsker, CMC, FIMC*

*Location: GB5-7*

What do executives really consider when bringing in outside consultants? Gain a priceless perspective from four executives who represent diverse industries and companies. Each will share their own unique insights, experiences and expectations when selecting and working with consultants. You will learn how prospective clients really find and select consultants and walk away with an understanding of what you need to do to get their attention and the contract. They'll share their consulting experiences . . . the good, the bad and the ugly! And they'll give honest answers to the questions you've been afraid to ask prospective clients.

Panelists:

- **Panelists: John Farahi, Chief Executive Officer, Atlantis Casino Resort Spa**
- **Sandy Haslem, PE, Director, Nevada Industry Excellence**
- **Tim Erlach, President, Erlach Computer Consulting**
- **Ron Donati, President, Donati Family Vineyard**

**Monday 10:30-12:00PM**



**Mo3: Speak with Confidence, Clarity and Charisma!**

*Jean Hamilton*

*Location: GB1*

Open more doors to new business opportunities—verbally and nonverbally. Regardless of your specialty, communication is crucial to your success. In this highly interactive session, you'll learn how to use your voice, body, and words to create a sense of rapport and trust. Jean will show you how to craft a clear, concise message to meet the listener's needs, offer tools of nonverbal communication, and describe how to build effective stories, appropriately colored with details and dialogue. People forget facts, but remember stories; Jean will identify ways you can use stories to enhance your credibility and make yourself memorable.

The best way to learn is by doing. This session provides you with a structure you'll use to create your message, and tell your stories. Exercises with participants will make this a valuable experience for anyone who wants to improve communication.

About the Speaker: Jean Hamilton founded Speaking Results in 1998 to enable people to be more successful with their presentations. She has worked with CEO's, CFO's, consultants, physicians, attorneys, architects, professors, financial planners and sales managers. Some of her clients have included: PATH, Olson Sundberg, Kundig, Allen Architects, Washington Medical Association, Global Partnerships, Microsoft, Miami University, Merrill Lynch, Oregon Dental Association, and University of Washington.

Jean's work integrates her background in speech, dance, theatre, Neuro-Linguistic Programming, storytelling, and improvisation. Through seminars and one-on-one coaching, she enables clients to develop a credible, engaging and authentic presence.



**Monday 10:30-12:00PM**

**Mo4: After the Proposal is Signed: Managing Client Expectations**

*Angela Dingle, CMC*

*Location: GB2-3*

We all want to increase the likelihood of our project's success, right? To do so, it's imperative to establish a mutual understanding of your client's project objective, as well as manage expectations throughout the engagement. In this workshop, Angela will share tools and techniques you'll be able to implement immediately with your engagements to proactively manage your projects. You'll learn how to establish a shared understanding of your client's objectives to help ensure success. You will hear about valuable tools and techniques, including a Scope Management Plan, Client Management Process, and A Deliverable Verification Process and Change of Control Process.

Angela will present techniques to identify the meaningful project objectives, clarify differences between quantifiable and non-quantifiable project objectives, and tips to control scope creep. This workshop takes you from the proposal, initiation, execution and close out phases of a client engagement to ensure your clients are delighted and satisfied with the project experience.

About the Speaker: Before founding Ex Nihilo, Angela Dingle served as a Line of Business Manager with profit and loss (P&L) responsibility for over \$40 million dollars in contract engagements for commercial, state and federal agencies. Angela is a Certified Management Consultant (CMC) with over 20 years of experience in business leadership, IT governance, risk management, compliance, software engineering, and quality assurance. She holds a MS in Management Information Systems from Bowie State University, Bowie, MD and a BS in Computer Science from DeVry Institute, Columbus, OH.

P.S. Angela explains the name of her business: "Ex Nihilo" is a Latin word that means out of nothing. It is sometimes used in a biblical context like when God created the world out of nothing (e.g., "creatio ex nihilo"). When my business partner and I started the company we had very little startup funds, but a lot of enthusiasm and a whole lot of faith that we'd be able to create something out of nothing. As the saying goes...the rest is history."

**Monday 10:30-12:00PM**



**Mo5: The Big Secret of Negotiation Breakthroughs**

*Bill Cole*

*Location: GB5-7*

Strong negotiation skills have an immediate, often dramatic bottom line impact. How good are your skills? Effective negotiation is essential in our consulting business and everyday life. In this engaging, fun workshop, you will measure your current negotiating skills, learn the Big Secret of Negotiation Breakthroughs, and discover 3 ways (at least) to immediately improve your negotiating ability. Bill will share the two most important, yet competing, axioms of every negotiation: the Discovery Principle and the impact of tension. This workshop may create immediate ROI through increased revenues and savings due to your more effective negotiation.

About the Speaker: Bill Cole is an internationally-respected professional speaker, trainer, facilitator, executive coach and consultant. Prior to focusing on leadership and organizational development, he was an athlete, coach, professional musician and taught at two universities. His career includes an international consulting assignment with a Radio and TV network, a national restaurant chain, a fast growth high technology company, a national business development firm and he was among the all time sales leaders for an international training company. Bill's mission is to positively impact people's lives. He recently published his new book, *The ABC Formula: Building Your Life's Enduring Core Values*.

### **Mo6: The Hidden Dynamics (and Ethics) of a Complex Consulting Assignment**

*E. Michael Shays, CMC, FIMC*

The scene: The good news—you landed a consulting assignment for an up and coming forestry products company. The bad news—there are two other consultants on the site, some shady shenanigans going on among the managers and employees and a president who has a secret agenda. In this highly interactive session we will explore some of the ethical bumps in your path with a panel of experts, actors and audience skills.

Oh my, what will you do? What will you do!

We know you know the difference between right and wrong, but are you prepared to deal with issues that seem to fall in the gray area? Come test your immediate reactions to business scenarios you might someday be facing. Is there really a gray area when it comes to professional performance? See what others say. Be prepared to make the right decision even when it might not appear you are facing an ethical issue. Oh, and yes let's have fun and some laughs.

From the opening scene, through the addition of a variety of challenging issues and interesting characters, this session will sharpen your ethical wits as you learn and have fun with a very serious topic.

About the Speaker: E. Michael Shays, a longtime member of IMC and Fellow of the Institute, was Chairmen of IMC in 1983-85 and again in 2001-2002. He was also a founding member of ICMCI, the International Council of Management Consultant Institutes, and served as its chairman in 1993-95.

Michael was the framer of IMC's 1985 Code of Professional Ethics and introduced the first Ethics examination for CMCs in that year. He was a key contributor to the description of what each provision in the current code means.

He is past publisher of the Journal of Management Consulting, aka C2M, and has also written about professional ethics. His article, "Obedience to the Unenforceable" will be provided to all Confab attendees.

Michael specializes in facilitating solutions to problems where there has been resistance, lack of innovation, lack of progress or ethical dilemmas. His book, Pricing Consulting Services, is based on the ethics of win-win.

Michael was presented with IMC's Lifetime Achievement Award in 1999

Monday 2:00-3:30PM



**Mo7: Doing Business with the Federal Government and the Public Sector**

**Panelists:**

**Location: GB1**

*Charles J. Day, CMC, FIMC*  
*Angela Dingle, CMC*  
*Roseanne Lopez, CMC*  
*Linda Howard, CMC, PMP*  
*Robert Fuller, CMC*

Do you want to do business with Federal Government and/or the Public Sector? Yet you've heard it is vastly different, too difficult and you have no idea where to begin. This panel will discuss the practical steps in successfully gaining, maintaining and sustaining your consulting business with the Public Sector. They will share their experienced-based insights on how they got started, the credentials needed, teaming opportunities, value-creation, and ways to best market and manage engagements, ethically and successfully.

You'll learn what's needed to position your firm and identify opportunities that best fit, to better understand contracting opportunities and constraints, and ways to parlay your expertise for additional contracts and work.

The panel, all seasoned consultants, will share lessons they've learned in successfully sourcing business and will share their understanding of the uniqueness in the Public Sector procurement process. You'll also hear how to get paid what you're worth and how to protect your Intellectual Property, essential in any sector.

Charles E. Day, CMC, FIMC: A native of Savannah, GA, former airline executive and founder of Charles E. Day and Associates LLC in Alexandria, VA, Charles E. Day Sr. is author of a McGraw-Hill book, *Call Center Operations: Profiting From Teleservices* and *Tenth Man: Living Black in Blue*. His management consulting firm specializes in customer service, business process reviews, and technology transfer. Client engagements include Federal Government, local City and County governments across USA in transportation, utilities, Equal Opportunity, Defense and Commerce. He is past chair of IMC USA ethics committee. He received his B.S. degree in mathematics, physics, and education from Savannah State University and M.S. in Administration and Computer Science from George Washington University in Washington, DC.

Angela Dingle, CMC: Before founding Ex Nihilo, Angela Dingle served as a Line of Business Manager with P&L responsibility for over \$40 million dollars in contract engagements for commercial, state and federal agencies. Angela has over 20 years experience in business leadership, IT governance, risk management, compliance, software engineering, and quality assurance. She holds a M.S. in Management Information Systems from Bowie State University, Bowie, MD, a B.S. in Computer Science from DeVry Institute, Columbus, OH and is Certified in the Governance of Enterprise Information Technology. Angela serves as Diversity Co-Chair on the Executive Advisory Board for Women Impacting Public Policy (WIPP) and Vice President of Professional Development for the IMC National Capital Region.



**Monday 2:00-3:30PM**

Linda Howard, CMC, PMP (*Project Management Professional*): Specializing in helping organizations improve performance and manage change, Linda is Founder and General Manager of Howard Consulting, LLC. Her experience spans multiple industries, including education, financial services, state and federal governments, information technology, telecommunications, and criminal justice. Linda's firm specializes in project management, strategic planning, change management, and systems integration.

Robert Fuller, CMC: Mr. Fuller is a Senior Associate with Pacific Consulting Group, Inc. and has over thirty years experience in business advisory services. He has direct experience in information technology management, accounting and administrative department organization, procurement processes, operations and productivity improvement; and information systems strategic planning. Bob has provided independent verification and validation (IV&V) services and quality assurance reviews for numerous enterprise projects for both major government agencies and public utilities. He was previously a partner with Deloitte & Touche LLP where he directed the firm's information technology consulting to the utility industry.

Bruce Smith, PMP: Dr. Smith's 30+ year career has been either in the public sector as a budget officer, city manager and elected official or as a consultant to the public sector with multiple consulting firms, including Deloitte & Touche where he retired as a Senior Manager. His consulting experience ranges from operations improvements, technology strategy, system selection and implementation, change management and financial analysis. His public sector clients include cities, counties, state agencies, special districts, tribal governments and not-for-profit entities. Recent clients include the Sacramento Sanitation Districts Agency, San Mateo County, Trinity County, Orange County Sanitation District and Hillsboro, OR. Dr. Smith is also an adjunct professor with the University of San Francisco teaching Public Sector Budgeting in the MPA program and with Brandman University teaching multiple business courses in the undergraduate and graduate business program. Dr. Smith has earned the PMP certification from the Project Management Institute.

**Monday 2:00-3:30PM**



**Mo8: Five Generations in the Workplace: New Realities and Strategies**

*Sindy Martin*

*Location: GB2-3*

Today we have 5 generations and their multiple cultures in the world of business. As consultants, understanding and appreciating generations' cultural impact on organizations is essential to successful engagements. Our ability to communicate with multi-generations can eliminate major issues and misunderstandings for us both professionally and personally. Sindy will describe each generation's perceptions and priorities and the cultures within them. She'll illustrate how generational communication styles affect business and suggest ways to encourage diverse working styles across all generations. We all need to be aware of, and facilitate our clients to better understand that each generation has distinct attitudes, behaviors, expectations, habits and motivational buttons...and Sindy will show us how!

About the Speaker: Sindy Martin is the found of Smartin International—a consulting practice focused in helping organizations and leaders polish their professionalism and enhance interpersonal skills, including how to effectively communicate with the different generations. Sindy has over 20 years experience in a variety of industries and large corporations in consumer products. Sindy offers communication and leadership programs, keynotes and executive coaching to Fortune 500 companies and universities and has presented at many national conferences. She is also the author of *Are you a Duck, an Elephant or a Mouse? How are You Perceived When You Walk into a Room?*

### **Mo9: Where's Your Sweet Spot?**

#### **Refine Your Consulting Niche to Own a Specialized Market Segment(s)**

*Elizabeth Andreini and Mel DePaoli*

*Location: GB5-7*

If you've ever wondered "if" you should or "how" you could become a specialist, this session is for you! In this dynamic, informative session, you'll learn why you should focus your consulting practice to become a "specialist". This session will give you a roadmap and practical tools to help refine your business and target market to increase your revenue and success. You'll gain insight into changing your competitive landscape to leave your competitors in the dust and reduce price pressures. Learn to reframe what you do and how you work to bring more value to your clients.

Elizabeth Andreini and Mel DePaoli, two talented and successful marketing experts, will help you gain a fresh look at past clients and engagements to better understand the value you provide through your services, skills and abilities. You will examine your current offerings and learn skills to help you create niche offerings for key market segments to maximize your effectiveness and profit potential. If you want to improve your unique value proposition, reposition, or repackage your services and launch the next generation of your business, this is the session for you!

#### About the Speakers:

Elizabeth Andreini is founder and President of Accelerate Marketing, LLC. a consulting firm specializing in high-impact marketing and product management strategy and execution for global companies. Accelerate Marketing provides interim CMO services and on-demand executive-level marketing and product management leadership for B2B multi-channel companies. She has over 25 years of global experience in marketing, product management, business development in corporate and early stage environments in executive and senior marketing positions. Elizabeth is President of the IMC Pacific Northwest Chapter. She has a MBA, Marketing/ International Business, University of Washington and BA, Economics, Claremont McKenna College.

Melanie DePaoli is founder and President of Omicle where she has spent a decade working with companies, schools, government clients and individuals. Her experience includes organizational culture, diversity programs, branding, operations, and self-publishing. She has in-depth knowledge of how culture, branding and operations intersect and impact a company's bottom line. Mel's focus today is the challenges faced by the construction industry. Mel is currently working on the second edition of her book "Contractors: Doing it Right, Not Just Getting it Done."

**Monday 4:00-5:15PM**



**Mo10: The Trust Equation**

*Jerry Fletcher*

Location: GB5-7

Who do you trust? In the first few minutes of this dynamic, insightful session, you will learn that: it doesn't matter what you know; it doesn't matter who you know; the key to success... is who trusts you! Because those who trust you become your raving fans! From strangers to 'just connections' to clients, trust is "the" binding force. In business and personal affairs, this single idea can light your way to success. In his humorous, candid style, Jerry Fletcher will share insights and real-world examples of the power of trust. You will leave this session inspired and recognize that gaining trust is the most important skill you need to build and increase your business.

You'll learn:

- **How to trust yourself, your team, and most importantly, your clients.**
- **A simple mantra to double your income.**
- **How you can emulate a Galactic Commander.**
- **The dollar value of the Integrity Dividend (with research results).**
- **Why trust is counter-intuitive.**
- **Brain research findings on how trust and marketing work.**
- Hard numbers on the value of raving fans on and off-line.

You will leave this session inspired and recognize that gaining trust is the most important skill you need to build and increase your business.

About the Speaker: In 1990, Jerry Fletcher founded Z-axis Marketing, Inc., a consulting practice focused on building trust-based marketing strategies for small and medium companies. A cutting edge strategist, author, and professional speaker, Jerry is a former advertising/PR agency CEO and an expert at business development and practice management. Jerry speaks professionally as "The Networking Ninja" ([www.networkingninja.com](http://www.networkingninja.com)). His pragmatic knowledge of how to combine customer relationship management with referral based sales and marketing techniques on and off-line has been gleaned from over 40 years as a Rainmaker and client satisfaction specialist.

**Mo11: Building Organization Agility: The Consultant's Role**

*Mark R. Haas, CMC, FIMC and Tom O'Shea, CMC*

*Location: GB2-3*

Change is inevitable, but are your clients agile enough to survive in this rapidly evolving world? Today's market conditions demand organizations think broadly, respond quicker, and shift processes, internal culture, target markets, or customer types. Basically, our clients need to be agile enough to do what is needed to "out-evolve" their competitors. Agility, however, is more than a "state of mind." It is being able to overcome that which fundamentally constrains the ability to adapt.

This session describes what it means to be "agile". You will learn powerful ways to increase your client's awareness of agility's impact on long-term performance and how you can help their organizations become more agile. Those clients who become more agile can remain clients for a long time.

About the Speakers:

Mark Haas, CMC, **FIMC** is President of Research and Organization Management, a Washington-DC-based management consulting firm that strengthens the structure, culture, processes and leadership of mid-sized organizations through streamlined planning, disciplined execution and increased agility.

Mark brings 30 years in research, management, consulting and facilitation, and experience in varied industries in the private, public and nonprofit sectors. His clients span biomedical research, social services, energy, education, military, professional services and trade associations. He facilitates sessions such as WWIV military strategy, recovery from nuclear terrorism, national health security strategy, technology education and CEO roundtables.

Mark is a Certified Management Consultant (CMC), was lead quality examiner (Baldrige), and has held several professional society leadership positions, including National Board Chair and Ethics Chair of IMC USA.

**Tom O'Shea, CMC** is a Principal in Agility Consulting & Training, a consulting practice dedicated to helping client organizations and leaders become more competitive and effective in our increasingly turbulent and time-pressed world by becoming more AGILE (aka focused, fast & flexible). Agility Consulting is a recognized leader in the field of organizational and leadership agility. Tom specializes in strategic business development, leadership coaching and organizational improvement practices. He has more than 20 years varied industry experience in senior executive roles in Human Resources, Strategic Planning and General management in the US, Europe, and Japan.

Tom is a Certified Management Consultant (CMC) and a former President of the IMC Carolinas Chapter. Tom holds a master's degree in Organizational Psychology.

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