

Programme Overview

The program speaker for the two days is Adelaide Ness, Shareholder and Executive Vice President of The Rainmaker Companies, Nashville, Tennessee.

Adelaide will speak on the topics: Positioning Yourself As A Trusted Advisor and Collaborating for Success; she will integrate a description of the Professionalism Series we have been designing and also facilitate our Roundtable on Tuesday.

Positioning Yourself As A Trusted Advisor

In this session, Managing Partners explore how to best position themselves as a Trusted Advisor both internally and externally. They will plan how they will increase their relationship and coaching others to increase the level of trust with clients through improving credibility, reliability, intimacy and lowering the level of self-interest that is demonstrated. We will introduce the concept of co-development and introduce tools to assist with this for internal, client and prospective client opportunities which positions meetings into effective co-development strategy sessions.

Collaborating for Success

In this custom session, Rainmaker and CPAAI team up to facilitate a session where members explore best practices in collaboration with one another to maximize the impact of CPAAI. This includes a pre-survey, a lively facilitated discussion and the opportunity for members to openly share with one another. The goal of this session is to bring members together and create opportunities for stronger relationships and partnerships and help them leverage their investment and be competitive by using tools to better compete with larger firms. Specific takeaways to be determined in planning.

