

# Digital Deep Dive Summit

## DAY 1 AGENDA

### PRE-SESSION

10:30 - 11:45

Joy Youell and  
David Toth

#### AI and Content: How Does AI Fit Into Your Tech Stack?

Wanting to know how AI is going to become part of your tech stack and strategy going forward? Our panelists will share what firms are using, testing, and discuss other various technologies to help drive content marketing efforts. This is an interactive session that will provide a hands-on opportunity, so bring your laptop!

*This event is free to attend but not part of the of Summit that kicks off at 1:00.*

### SUMMIT

1:00 - 2:30

David Toth

#### Welcome and Introductions

- Introduction of attendees, facilitators, guests and sponsors
- General housekeeping and agenda overview
- Review of pre-event survey results
- State of the Profession from a digital lens / Top 500 Website Report

2:30 - 4:00

LinkedIn Team

#### LinkedIn: The Best Tool in *and for* Business

Firm growth, and your role in it, is becoming more reliant on social selling. In this unique, exclusive session, experts from LinkedIn will help you elevate your digital brand to make it work for you.

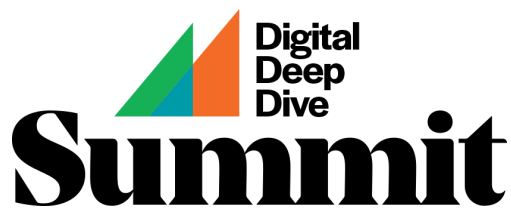
Presentations:

**Purna Virji** - As LinkedIn's content marketing lead, her role is to educate customers on best LinkedIn presentations + practices for LinkedIn marketing. Purna will touch on how firms can use LinkedIn B2B marketing Q&A to build a brand that generates leads.

**Jessica Olives** - Jessica manages executives in the finance industry and helps them optimize profiles and share content on the platform. She will provide examples of the types of content that work best for professionals in this space and tips that you can apply to your profile.

Each presenter will speak for 30 minutes. After both presentations, we will conduct 30 minutes of Q&A.





Digital  
Deep  
Dive

# Summit

**4:00 - 4:15**

**Break**

**4:15 - 5:00**

Chase Birky

**Dark Horse: Disrupting Your Way into New Markets**

Dark Horse CPA came out of nowhere to disrupt the industry with a new way of structuring accounting. Learn from its founder how it has achieved momentum with a top-quality website and an investment in generating leads. What can you learn from this model? This session will also address what an appropriate ad spend is and what the future of the accounting space will look like.

**4:45 - 6:00**

**Ask the Expert Roundtable Sessions & Day 1 Wrap-Up**

**6:00 - 6:30**

**Free Time**

**6:30 - 8:00**

**Cocktail Reception**

## DAY 2 AGENDA

**7:00 - 8:00**

**Breakfast Buffet**

**8:00 - 8:45**

Gary Shamis

**Industry Update: View from the Corner Office**

From M&A and PE to adding talent and culling clients, Gary will provide an update on what is old, new, exciting, and necessary in 2023, and some trends to keep your eyes on.

**8:45 - 9:45**

Drew Kraemer

**From the Lens of a B2C Growth Leader**

For decades, clients responded to the way our industry operated. Today, they're shaping the way we attract, retain, and grow relationships. From lead gen from demand gen, using digital in professional services is a game changer, and one that if used correctly, can work to your firm's benefit.

**9:45 - 10:00**

**Break**

**10:00 - 11:00**

Tim Keith and Jennifer Warawa, moderated by David Toth

**Data Can Drive Firm Growth. Really.**

Every step of a client's buying journey has a DTA point that can make their experience more personal and ensure that relationships are maintained on an ongoing basis. Technology is helping us get smarter, better, and generate results like never before. But knowing how to use it and analyze the data is the most critical component.

**11:00 - 12:00**

**Wrap Up**

Presented by:



**QuickFee.**