

Pathway to Platinum®: Optimizing the Value of Your Company 12th Annual Conference



Event Dates: Thursday, October 12, 2023 – Friday, October 13, 2023

Venue: Wentworth by the Sea • 588 Wentworth Road • New Castle, New Hampshire

Attendees: Limited to 40+ owners and C-Level executives of entrepreneurial and closely held businesses with revenues of \$10 million to \$1 billion

Content: Roadmaps for operational improvements to maximize the company value

Agenda: Thursday, October 12th

- 5:00 – 7:00 pm Registration
- 6:30 – 10:00 pm Cocktail Reception & Welcome Dinner

Friday, October 13th

- 7.15 – 8.00 am Breakfast
- 8.00 – 8.15 am Introductory Remarks
- 8.15 – 9.00 am Key Traits of a High Performing Middle Market Leader
 - 50% or More Time Focused on the Future
 - Jump into the Discomfort Zone
 - Curious with a Learning Mindset
 - Prioritize and Be Decisive, Adaptive, and Resilient
- 9.00 – 9.30 am Driving Success at Your Company
 - Know Where the Profits Are Made
 - Match Investment to Priorities
 - Execute the Plan
- 9.30 – 10.15 am Panel: Best Practices and Challenges to Driving Your Growth
- 10.15 – 10.45 am Coffee Break and Checkout
- 10.45 – 11.15 am Winning the Talent War
 - Align Mission and Performance to Appeal to Prospects
 - Recruit and Retain Talent Better than Your Competition
 - Create Collaborative Environments
- 11.15 – 12.00 pm Panel: Innovative Approaches to Talent
- 12.00 – 12.45 pm Networking Lunch
- 12.45 – 1.45 pm Hot Topic: Unleash the Power of AI for Your Business – Jay Modi, CTO, Alchemai
- 1.45 – 2.15 pm Optimize your Board of Advisors or Directors
 - External Focus – Customer, Client, and Competition
 - Long Term Viewpoint
- 2.15 – 3.00 pm Panel: Proven Steps to Elevate Your Board
- 3.00 – 3.30 pm Prepare Your Company for the Next Gen or for Sale
 - “Lens of the Acquirer”
 - Analyze the Scalability of Your Business
 - Institutionalize your Processes
- 3.30 – 4.15 pm Panel: The Value of Preparing in Advance
- 4.15 – 4.30 pm The Platinum Advantage: Bringing It All Together
- 4.30 – 5.00 pm Networking Reception

Attendance Fees: \$2,095 Attendee Registration (All meals included. Special hotel room rate of \$329 per night.)
 \$1,695 Early Registration (Available through September 11, 2023)
 \$2,895 Early Registration + C Level Community Membership (one-year)

Presenters: Lawrence Siff, CEO, Neptune Advisors
 Jay Modi, CTO, Alchemai

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