



NORTH TO THE FUTURE ALASKA 2023

May 13-20 • 6 CLE Hours



Princess Cruise Line • Vancouver, BC to Anchorage, AK (Whittier)
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CLE Speaker



Tim McKey

Tim McKey began his career at Deloitte in 1983, founding the Vista Consulting Team in 2009. He has decades of experience working with local, regional, and national CPA firms, and has advised hundreds of law firms around the country.

As a CPA, and with several consultants who are also lawyers, Tim built a team that focuses on everything from management philosophy and strategic planning to implementation through programmatic systems. They consistently teach law firms how to track and monitor all aspects of law firm effectiveness and efficiency, usually creating custom dashboards to analyze “key performance indicators.”

Since all efficiencies and quality affect a firm’s bottom line, they focus on everything. From a technical standpoint, they review firm entity structure, accounting systems, and financial reporting. They test and improve client intake. They implement new software programs. They address human resources issues. And that’s just the beginning...

When working with Tim, clients often refer to “light bulb” moments...perhaps best referred to as BFOs (a Blinding Flash of the Obvious). He likes to say that business is “just not that complicated.” Tim’s ability to mentor successful business leaders, gently push them to new levels of thinking, while providing creative perspectives, contributes to Vista clients’ success, as well as Vista’s.

Tim’s strategic vision for Vista has made a great contribution toward developing a team of consultants who take a comprehensive approach to working with their clients. Identifying and solving operational issues is not the only goal...enhanced profitability and having fun doing it is real success.

Personally, Tim has two daughters, Sarah and Caroline, three granddaughters, Mary Grayson (MG), Ryleigh and Kate, one grandson, Timothy, and one wife, Jodi. A self-proclaimed business nerd, Tim enjoys reading, pondering and discussing future business trends, models, and disruptive change, tennis, exercise, and the pursuit of the “abundant life.”



CLE Sessions

Sunday, May 14, 2023

Presented by: **Tim McKey, Vista Consulting**

7:30 am **Checkin**

7:50 a.m. **Announcements and Introductions**

8:00 a.m.

Case Management Tools & Thinking

There are countless case management programs, of varying quality and pricing. Some target particular practices. The most important attribute of the program is you. How do you think about using it? How do you use it? Many of the programs have similar functions. We'll walk through what you need to know and do to stay sane and ahead of your clients.

9:00 a.m.

Technology to Review, Research, & Write

Law firms are inherently document focused. Increasing efficiencies will increase your bottom line. We'll cover document management systems, eDiscovery tools, doc review, eSignature, and word processing. Few lawyers stay up to date with the latest technology - our plan is to get you there so you know your options and which ones to explore further.

10:00 a.m. **Break**

10:15 a.m.

Social Media & Other Marketing

Client development isn't the handshaking game it used to be. Today, clients find us through referrals and online searches. How can you empower and encourage former clients to bring you new clients? How do possible clients find you organically? What tools make the most sense for a firm of your size and focus?

11:15 a.m.

All the Numbers: Accounting, Bookkeeping, & Performance Tracking

Many firm owners don't know how much they're spending on differing things, their profit margins, or where most of their time goes. You need a well-constructed dashboard to inform your business decisions. We'll discuss software and tools for accounting and tracking key performance indicators of the firm.

12:15 p.m. **Lunch**

1:00 p.m.

Hiring, Managing, and Outsourcing

Many firms are struggling to hire the right people and keep them. There are many online platforms to help on both fronts. Make sure to set the right expectations, then monitor how your team is really doing. And, consider joining the 80% of law firms that outsource various work, including legal research and writing.

2:00 p.m.

Making Digital Communications Work Better

Whether or not your firm operates remotely, you need to stay in sync with each other, clients, and potential clients. Are your remote meetings seamless? Your time should be spent on meeting content, not meeting process! Are you efficiently communicating, calendaring, and following up? We'll discuss the tools and how to integrate them.

3:00 p.m. **CLEs end**



Book Your Cabin on the Princess Majestic

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Register for CLE Sessions:

Registration fee: \$900 • After 2/1/23: add \$300

MCLE Accreditation:

This program offers six 60-minute hours of CLE. Check the website for accreditation status for your state. Contact Mary if your state is not on the list.

All information can be found at www.DestinationCLEs.com



*The cost of the cabin does not include:

- CLE sessions registration fee
- Airfare, excursions, meals at ports, etc.
- Before and after cruise accommodations/tours

INCLUDED! DON'T WAIT, BOOK NOW!

- Free Premier Drink Package
- Free Gratuities
- Free wi-fi
- \$100 Shore Excursion credit per person
- Refundable deposit



Based on availability.

Your health, safety, and well-being is our highest priority.

Ports of Call



Vancouver, British Columbia (Day 1)

Canada's third-largest city, Vancouver is a cosmopolitan place with a European feel and a personality all its own. It's a community with a rich ethnic mix - including the second-largest Chinatown in North America - and stunningly beautiful parks.



Ketchikan (Day 3)

Much of the town's colorful past is still evident, both in the city center and especially in the nearby Native American villages, where visitors will be enchanted by colorfully carved totem poles and the fascinating legends that surround them.



Juneau (Day 4)

Juneau, Alaska's remote capital, sits in the state's panhandle, at the base of 3,819-ft. Mount Roberts. Reachable only by boat or seaplane. A tram carries visitors 1,800 feet up Mount Roberts to an alpine area with hiking trails, wildflowers and views of Gastineau Channel.



Skagway (Day 5)

With its colorful history Skagway is one of the most interesting and bustling towns of the Inside Passage. Skagway was born during the Gold Rush of 1898 when more than 10,000 adventurers used the community as the starting point of their hunt for gold. Now, nature has reclaimed the land, offering visitors the opportunity to explore the rainforest, visit historic ruins, breathe in the fresh mountain air.



Glacier Bay (Day 6)

Glacier Bay provides travelers with the perfect day of cruising quietly through the best of Alaska. Visitors should have their camera ready to capture the moment giant pinnacles of ice crack off the face of the glaciers.



College Fjord (Day 7)

Glacier Bay provides travelers with the perfect day of cruising quietly through the best of Alaska. Visitors should have their camera ready to capture the moment giant pinnacles of ice crack off the face of the glaciers.



Whittier (Day 8)

Whittier, a 45-minute drive to Anchorage, is nestled at the base of mountains that line Passage Canal, a fjord that extends into Prince William Sound. The surrounding peaks are snowcapped for most of the year and a glacier hangs above the town to the west. Whittier is a berry picker's paradise with blueberries and salmonberries growing in abundance at the edge of town.

Visit Denali

Tours & Accommodations

*Have you always wanted to travel to Alaska but have no idea where to go and what to see?
We will customize your trip and make it an unforgettable experience!*

Glacier & Whale Watch Tours



Helicopter Tours



*Many
Options!*

Alaska Railroad Tours



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Call 907-231-2111 or email: MARY.DESPAIN@CRUISEPLANNERS.COM

Pre and Post Cruise Extensions Vancouver, BC and/or Alaska

Vancouver, Canada

Spend a few more days in what's often thought of as Canada's most beautiful city and you're sure to fall in love with it. Vancouver is a gorgeous thriving metropolis that's fortunate enough to be flanked by the ocean and mountains. With its numerous parks, beaches, gardens, museums, art galleries and ethnic diversity, Vancouver is one of those rare places that actually lives up to its promise of offering something for everyone.



Anchorage, Alaska

Home to the vast majority of its state's residents, Anchorage has all the features of big-city life with its variety of shops, restaurants, museums and nightlife, yet the city is never far from the North American frontier. Extend your stay to discover the city's unique charm, which lies in the juxtaposition of its modern conveniences and the wilds of the Kenai Peninsula and the surrounding Chugach and Alaska mountains.

Extend your stay longer to see Denali, the highest mountain peak in North America. Experience Fairbanks with 24 hours of daylight hours. So much to see, so much to do.



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