

MONDAY, 11/1/2021	– Social Networking Events & Avionte MasterMind
10:00am – 4pm CST	SOCIAL EVENTS – GOLF EVENT
	TEXAS RANGERS GOLF, ARLINGTON, TX
	12:20PM TEE TIME – PENDING TEE TIMES CAN ONLY BE MADE 7 DAYS PRIOR
	AVIONTÉ TECHNOLOGY MASTERMIND
	Avionté Software Updates & Success Integrations & Member Sharing
4:30pm – 6:00pm CST	Led by ASGroup MasterMind Co-Leaders - Leisa Stallard, The Reserves Network and Brigid Isenmann, Avionté
	ASGroup offers a quarterly Avionté MasterMind for members on the telephone. In this session members will experience the November monthly MasterMind Meeting live as well as get updates on Avionté Software integrations and discuss any issues or opportunities.
6:00pm – 7:30pm CST	WELCOMING COCKTAIL RECEPTION
	Sponsored by Avionté
Tuesday, 11/2/2021	
7:00om 7:45om CST	BREAKFAST WITH AFFILIATE INDUSTRY PARTNERS (Mandatory for Hotel Spend) - Continental Breakfast
7:00am – 7:45am CST	Please visit our Affiliate Industry Partners and learn about their technology and marketing tools that can be resources for your company.
7.50em 9.20em CST	WELCOME TO DALLAS – INTRODUCTIONS & MEETING OVERVIEW
7:50am – 8:30am CST	ZOOM LINK: <a href="https://us02web.zoom.us/j/85321927091?pwd=YnE0UEpRaFdxQ1lwd3Y5MkRqb1d6QT09">https://us02web.zoom.us/j/85321927091?pwd=YnE0UEpRaFdxQ1lwd3Y5MkRqb1d6QT09</a>
8:40am – 10:00am CST	OPENING SESSION – DIVERSITY, EQUALITY, AND RACISM FOR TODAY'S WORLD
	Guest Speaker: Nickoria Johnson, Chief Diversity Officer, Credera
	ZOOM LINK: https://us02web.zoom.us/j/85321927091?pwd=YnE0UEpRaFdxQ1lwd3Y5MkRqb1d6QT09



10:00am – 10:15am CST	BR	EAK
10:20am – 12:00pm CST	21 BEST PRACTICES IN 21 MINUTES	
	SALES/MARKETING/OPERATIONS	
	Facilitated by: Scott Fiore, Board Member & Partner @ Tristar Staffing	
	Members Round the Room Session: 21 Companies present the Best Sales/Recruitment/Operations Practice that is effective in their company. Pre-meeting: 21 Owners and/or Key Managers will be requested to contribute a sales, recruitment or operations best practice successful to them. Each member responding will have 1 minute to offer a best practice on sales and marketing. Then we will break out into groups to discuss the offered best practice in depth. Following the group break-outs, each group will report on the best practice discussed.  ZOOM LINK: <a href="https://us02web.zoom.us/j/82214479481">https://us02web.zoom.us/j/82214479481</a>	
12:00pm – 1:30pm CST	LUNCH WITH AFFILIATE INDUSTRY PARTNERS	
	Affiliate Industry Partners Quick Product Updates	
	12 AIP/5-Minute Overview Presentations by attending Affiliate Industry Partners. Please Visit Affiliate Partner Tables during lunch and breaks.	
1:00pm – 2:45pm CST	TRACK 1 – OWNERS	TRACK 2 – KEY MANAGERS
	WHAT'S HAPPENING IN YOUR MARKET – 5 Minutes Each	WHAT'S HAPPENING IN YOUR MARKET – 5 Minutes Each
	<ul> <li>Sales Growth/Gross Margin Growth up or down in 2nd quarter?</li> <li>What is the single most significant issue regarding sales or operations in your business today? What are you doing to address it?</li> </ul>	<ul> <li>Introduce Company, your role, market in, and what staffing segments</li> <li>What innovative ways and processes have you used for recruitment?</li> <li>What would you like to learn and share with others at this meeting?</li> </ul>
	<ul> <li>What is driving growth or causing a downturn in business?</li> <li>NEWLY REVISED FINANCIAL SURVEY OVERVIEW</li> </ul>	Networking Opportunity – Find peers from this session and meet casually over the meetings to share best practices of interest to you.
	ZOOM LINK: https://us02web.zoom.us/j/89778588660	
2:45pm – 2:55pm CST	BREAK	



2:55pm – 3:55pm CST	TECHNOLOGY IN STAFFING OVERVIEW
	Presented by: Maurice Fuller, New Vector Group In this session, we will discuss:
	<ul> <li>Top tech trends that are transforming staffing and recruiting</li> <li>How to successfully embrace tech trends to futureproof your business</li> <li>Best practices framework for digital transformation</li> <li>Rethinking business strategy in an evolving landscaping</li> <li>Preparing your business to harness the power of Al and data</li> <li>Using digital to bring disruptive innovation to your staffing niche</li> <li>Why digital staffing firms grow faster and enjoy higher margins</li> <li>Why investments in digital enhance the value of your staffing business</li> </ul>
	ZOOM LINK: https://us02web.zoom.us/j/88135401244
6:00pm – 10:00pm CST	NETWORKING DINNER – THE RUSTIC
	This is an optional event, but pre-registration is required.
Wednesday, 11/3/20	21
8:00am – 8:50am CST	BREAKFAST WITH AFFILIATE INDUSTRY PARTNERS (Mandatory for Hotel Spend)  Please take the time to talk to our valued Affiliate Industry Partners who invest time and money to attend.
	"STAFFING COMPETITIVE ADVANTAGE - IT'S ALL ABOUT THE EXPERIENCE"
9:00am – 10:00am CST	Presented by: Cory Kapner, Vice President of Global Sales and Partnerships, Recruitics.com  ZOOM LINK: https://us02web.zoom.us/j/88200382607
10:00am – 10:15am CST	BREAK



10:15am – 12:00pm CST	OWNERS & EXECUTIVES  Industrial Staffing, Office & Healthcare Staffing Breakouts  List, Rank & Discuss Your Burning Issues  A Deep Dive Discussion on Topics, Issues or Opportunities facing the Staffing Industry.  BREAKOUT INTO SMALLER GROUPS FOR GREATER TAKE-HOME.	TRACK 2 – KEY MANAGERS  Facilitated by: Key Manager Advisory Committee  21/21 Circle Back  Recruitment Round-the-Room  Round the Room discussion from yesterday's 21/21 best ideas related to recruitment. 1-2 minutes quick input on Yesterday's Best Practices.  PleaseYour participation is key to giving all take-home value.
12:00pm – 1:00pm CST	1 111	ZOOM LINK: https://us02web.zoom.us/j/9244822046
12:00pm – 1:00pm CST	LUNCH  Board Meeting - Lunch	
1:05pm – 2:45pm CST	AFFILIATE INDUSTR  Programmed Advert  Engaging Customers & Recruits –  FOLLO  RECRUITMENT TECH  ASGROUP MEMBER USER PANEL DISC  The Reserves Network	OGY – PANEL DISCUSSIONS RY PARTNERS PANEL tising - Recruitics.com Sense/On-Demand Staffing-Work'N WED BY: INOLOGY SUCCESSES CUSSING SUCCESSES & CHALLENGES rk   WSI   Lingo Staffing web.zoom.us/j/81682340500



2:45pm - 2:55pm CST	BREAK	
2:55pm – 4:00pm CST	TRACK 1 – ASGROUP OWNERS/EXECUTIVES "BOARDROOM SESSION"  Solutions for Issues & Opportunities Facing You  Recruitment/Sales/Operations  Topics will be selected from polling of employees and sent out in advance and each company in attendance will have 1 minute to talk about how they solve topics.	TRACK 2 – KEY MANAGERS  Burning Issues Networking and Table Discussions  3 Table Topics will be selected prior to meetings from employee polling. You will have the opportunity to rotate to another table every 20 minutes.

# **Dinner on Your Own - No Social Outing Planned**

THURSDAY, 11/4/2021		
8:00am – 8:50am CST	BREAKFAST WITH AFFILIATE INDUSTRY PARTNERS (Mandatory for Hotel Spend)  Please visit our Affiliate Industry Partners and learn about their technology and marketing tools that can be resources for your company.	
9am – 10:30am CST	"TRACTION"	
	ASGroup Keynote Presentation	
	Presented by: Derek Pittak, EOS Implementer for the Staffing Industry	
	From the best-seller book "TRACTION"	
	A process for strategic planning and its execution guaranteed!	
	ZOOM LINK: https://us02web.zoom.us/j/83613798795	



10:30am – 11:15am CST	TRACTION, SCALING UP, ASGROUP MEMBER PANEL
	BEST PRACTICES PANEL SESSION
	Members share successes using EOS/Scaling Up/Strategic Planning Execution
	Neil Stallard, CEO, The Reserves Network   Scott Fiore, Partner, Tristar Staffing   Roy Fazio, formerly The Protocall Group
	ZOOM LINK: https://us02web.zoom.us/j/89966476452
11:15am – 12:10pm CST	TAKE HOME VALUE
	WHAT WILL YOU PUT TO USE THAT YOU LEARNED FROM THESE MEETINGS?
	ROUND THE ROOM – MEMBERS & KEY MANAGERS COMMIT TO IMPLEMENTING WHAT THEY LEARNED
	ZOOM LINK: https://us02web.zoom.us/j/89966476452

### **CONCLUSION OF ASGROUP MEETINGS IN DALLAS**

"We hope to have shared top best practices and have given you take-home value."

#### **2022 UPCOMING MEETINGS**

FEB 2022 - SANIBEL ISLAND, FL (OWNERS & EXECUTIVES) | MAY 2022 - NASHVILLE, TN | NOV 2022 - LAS VEGAS, NEVADA

# **GUEST SPEAKERS**



**Derek Pittak**EOS Implementer & Owner

In the first 15 years of his career, Derek served in the United States Air Force, worked for the Department of Defense, and then joined KeyBank.

At Key, he was instrumental in leading the change for how the business managed their \$120M contingent labor budget. During that time, Derek gained an appreciation for the staffing industry and subsequently joined TalentLaunch, a nationwide network of independently operated staffing and recruitment firms.

At TalentLaunch, Derek held the role of Chief Operating Officer, responsible for the corporate support functions for the \$125M organization. The network hit the ceiling and found the Entrepreneurial Operating System (EOS) where Derek was responsible for the rollout and served as their Integrator during that time. His passion grew for EOS as he saw tremendous value in a simple and transparent business model.

In mid-2019, Derek began a new journey starting an EOS practice. Now, as an EOS Franchise owner and Certified EOS Implementer, Derek's passion allows him to help entrepreneurs and their leadership teams realize their vision and execute it. In just over two years, he has led 25+ organizations through the EOS journey.

Derek resides in the Cleveland area, with his wife Kelli and their four children. He also gives back to his community as an elected official.







Nickoria Johnson Chief Diversity Officer

Nickoria Johnson is a strategic, results-oriented professional with 25+ years of experience in Technology Leadership, Management Consulting and Portfolio Management. She has a proven track record for leading digital and cloud transformation efforts, optimizing multi-million dollar technology portfolios, defining and implementing change management initiatives, and establishing deep partnerships with business teams and vendor partners. Nickoria brings to the table a "people first" approach to leading teams, investing in culture and diversity, and building collaborative environments. In her current role as Chief Diversity Officer at Credera, she is responsible for accelerating the mission of amplifying voices of underrepresented groups and synergizing diversity, equity, and inclusion efforts toward unified goals to ensure accessibility, focus, and visibility of DE&I for the firm. Nickoria is a respected speaker on both DE&I issues and in the technology strategy space, speaking on the topics of leadership, business transformation, and career development across the country. Johnson is a national board member for High Tech High Heels, on the advisory board for Tomorrow's Scientists, Technicians, and Managers (TSTM), and an advisor for the Girl Scouts of Northeast Texas. Johnson attended Howard University and completed her bachelor's degree in business administration with an emphasis in management and organizational behavior from Benedictine University.







Maurice Fuller Founder

Maurice Fuller is the founder of StaffingTec and StackVantage and a technology management consultant to the staffing industry. Maurice works with staffing firms to modernize their tech stacks, accelerate digital transformation, and select the best ATS systems and staffing platforms for their business. He has more than 25 years' experience in the staffing industry – and he has been leading staffing technology initiatives for more than two decades. He is widely recognized as a leading staffing technology expert and is a sought-after speaker at conferences and events.

Previously, Maurice was Vice President at Wimmer Solutions, an IT staffing and consulting firm in Seattle, where he led large SOW programs at Microsoft as well as continuous improvement initiatives. Before Wimmer, Maurice was Executive Director of Operations for CompuCom's \$150m contingent IT staffing division where he led multiple functional areas, including IT and Marketing. Maurice has MBA and MSEE degrees from NYIT and the University of Washington.





Cory Kapner VP of Global Sales

Cory Kapner is the Vice President of Global Sales for Recruitics - a recruitment marketing analytics and optimization platform. Over the past 8 years, Cory has helped major marketplaces, staffing firms, and Fortune 100 companies with their talent acquisition and retention strategy. Cory brings a data-driven, subject matter expert approach to all situations and has proven to be a strategic partner for clients in both North America and Europe. His past experience includes Michael Page International, Indeed.com, and is a founding member of Recruitics.





# **AFFILIATED INDUSTRY PARTNERS**



<u>Access Capital</u> is the nation's premier independent commercial finance company serving the staffing industry nationwide. We have been financing the success of clients for over thirty years ranging in size from young start up enterprises to large public companies offering asset based lending, acquisition financing and advisory services.



Advance Partners is the leading provider of working capital and strategic services for the temporary staffing industry. Powered by Paychex, Advance services 500+ entrepreneurial temporary staffing firms that collectively bill revenues over \$2.5 billion annually.



ASJ Partners focuses exclusively on the staffing and recruiting industry. Our unique, comprehensive and 100% customized marketing solutions help you Win More, Sell More, Grow More and Be Found More...Whether you are a start-up, a regional or national firm, our team of experts is here to help.



<u>Asurint</u> is leading the background screening industry forward. Our powerful, customizable technology—backed by expert answers and personalized assistance—helps employers hire the right candidates every time, and faster than ever before. Our clients leverage better background checks to reduce manual workloads, minimize compliance risk, promote a safer workplace, and drive insights to boost hiring and recruitment success.



From the outset, <u>Avionté</u> software was designed to be a comprehensive operating platform for staffing businesses. Avionté provides robust software solutions that include CRM, recruiting, onboarding, payroll, billing, and business intelligence for clerical, light industrial, IT and professional staffing firms. Avionté was named on the Inc 5000 fastest growing companies list in 2020 for the 9th consecutive year.

BEACHWOOD CONSULTING, LLC

Advisor to Executives Owners & Boards

Beachwood Consulting LLC was established to assist staffing owners and operators meet their customers' and employee's changing expectations while focusing on their business. Fran spent the last 24 years as the CFO and a direct focus on operations with a 50+ year old regional Light Industrial, Healthcare, Administrative and Direct Hire in the human capital market.















Becker, LLC are trusted advisors uniquely committed to the Staffing Industry. Our national staffing practice is recognized as one of the largest in the country. Our clients span the spectrum of the industry in terms of size, ranging from smaller highly specialized firms to large publicly traded staffing companies. In terms of market sectors, our staffing clients focus in a variety of areas including light industrial, professional services (legal, accounting and finance), IT, healthcare, engineering and commercial.

<u>Citrin Cooperman</u> is the nation's largest provider of accounting, tax, and business advisory services to the staffing industry. With over 40 years of experience advising staffing firms, we understand the financial challenges that business owners face. Through careful examinations of business structures, costs, and tax strategies, our professionals are able to help organizations save thousands of dollars annually and reach new levels of financial success.

<u>Crimcheck</u> and the Affiliate Staffing Group (ASG) have partnered to help protect your customers, their employees, assets, and brand with Crimcheck's comprehensive, accurate and compliant background screening solutions. Crimcheck's solutions and integrations with the industry's leading ATS and onboarding solution providers will improve your team's efficiency, enhance candidate experience, and accelerate time to hire. And, our award-winning customer service will help you every step of the way.

<u>Corporate Cost Control</u> is a workforce solutions provider that delivers customized, bundled and stand-alone solutions helping staffing firms to improve performance and reduce costs through solutions, such as unemployment cost management and employment/income verification services.

The attorneys in the Staffing, Recruiting and Workforce practice group of <u>Curtin & Heefner LLP</u> provide legal advice and representation focused on the distinct concerns of staffing industry clients throughout the United States and beyond. Our attorneys are experienced in servicing the needs of staffing industry clients ranging from smaller, highly specialized firms to larger, publicly traded staffing companies serving numerous market sectors, including: light industrial, professional services (legal, accounting and finance), IT, healthcare, engineering and commercial.

<u>Digi-Me</u>'s proprietary technology platform and the unmatched data we generate enhances Digi-Me's custom recruitment videos, spotlighting career opportunities and corporate culture. Digi-Me delivers information to job seekers in a way that is more engaging and more accessible across all platforms and devices. Our professional-quality video and technology solutions include the latest cloud-based analytics providing up-to-the-minute reporting on candidate behavior, including social sharing, as well as automatic integration into your ATS.



#### **DALLAS, TX MEETING AGENDA**

# "2021 LIVE SHARING OF BEST PRACTICES FOR GROWTH" NOVEMBER 1 - 4, 2021

Updated: October 25, 2021



With gigRonin's dynamic platform deploying labor has never been easier! With smart-matching technology quickly search for the right workers based on tailored qualifications. Create schedules and broadcast work instantly to your workforce.



Websites. SEO. Digital advertising. Social media. Blogging. Recruitment marketing. You name it. Whether you're looking to drive sales or attract talent, <u>Haley Marketing</u> will provide the marketing tools and technology to help you stand out, stay top-of-mind, and sell more!



MJA & Associates is a contingency based tax credit processing firm focused on the staffing industry. We specialize in government tax incentives, which can help increase your profits.



Odell Studner partners with forward-thinking companies who understand that taking action to reduce risk and control costs accelerates growth and increases profitability. Our unique approach to risk management and employee benefit cost reduction is strategic, proactive and impactful. We advise staffing clients on controlling health insurance and property and casualty insurance spend in order to provide a competitive advantage and retain top talent.



<u>Sense</u> is the all-in-one communication and engagement platform, powered by Al and machine learning, giving modern staffing agencies the ability to create long term and hyperpersonal connections with their talent at scale. Sense empowers recruiting, marketing, and sales teams to dramatically improve the candidate experience, lower attrition, increase redeployment, and accelerate growth.



<u>StaffUpApp</u> provides a white-label mobile app for your brand to help reduce your cost per hire, fill jobs fast, provide a seamless candidate experience, and maximize the investment you already make into cultivating your talent pool.



<u>Sterling National Bank</u> is the leading provider of financing and administrative services for staffing and IT consulting firms nationwide. We've been fueling growth in the industry for more than 35 years, offering asset-based lines of credit, payroll funding, payroll processing, and accounts-receivable financing.







Synergi Partners specializes exclusively in helping employers take advantage of federal and state tax credit programs, as well as disaster relief incentives. With an executive team made up of thought leaders who have made significant contributions to the incentives industry, Synergi Partners' main goal is to provide the best service available to achieve maximum value for its clients.

WinSource Group is a consulting firm focused on helping staffing companies break out of price-driven commodity competition by helping them create differentiation through an improved customer experience. We take our 50 years of sales, marketing, and training experience in the staffing industry, and boil it down to the priorities and actions that drive results. We help your team align around clear objectives and teach the skills needed to improve sales performance and strengthen customer relationships.

