



B O L D L Y

GO

Closing Keynote

Scaling New Heights 2024 Encore Day



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THE DISRUPTORS



CHANGING ADVISORY LANDSCAPE



CLIENT ADVISORY SERVICES



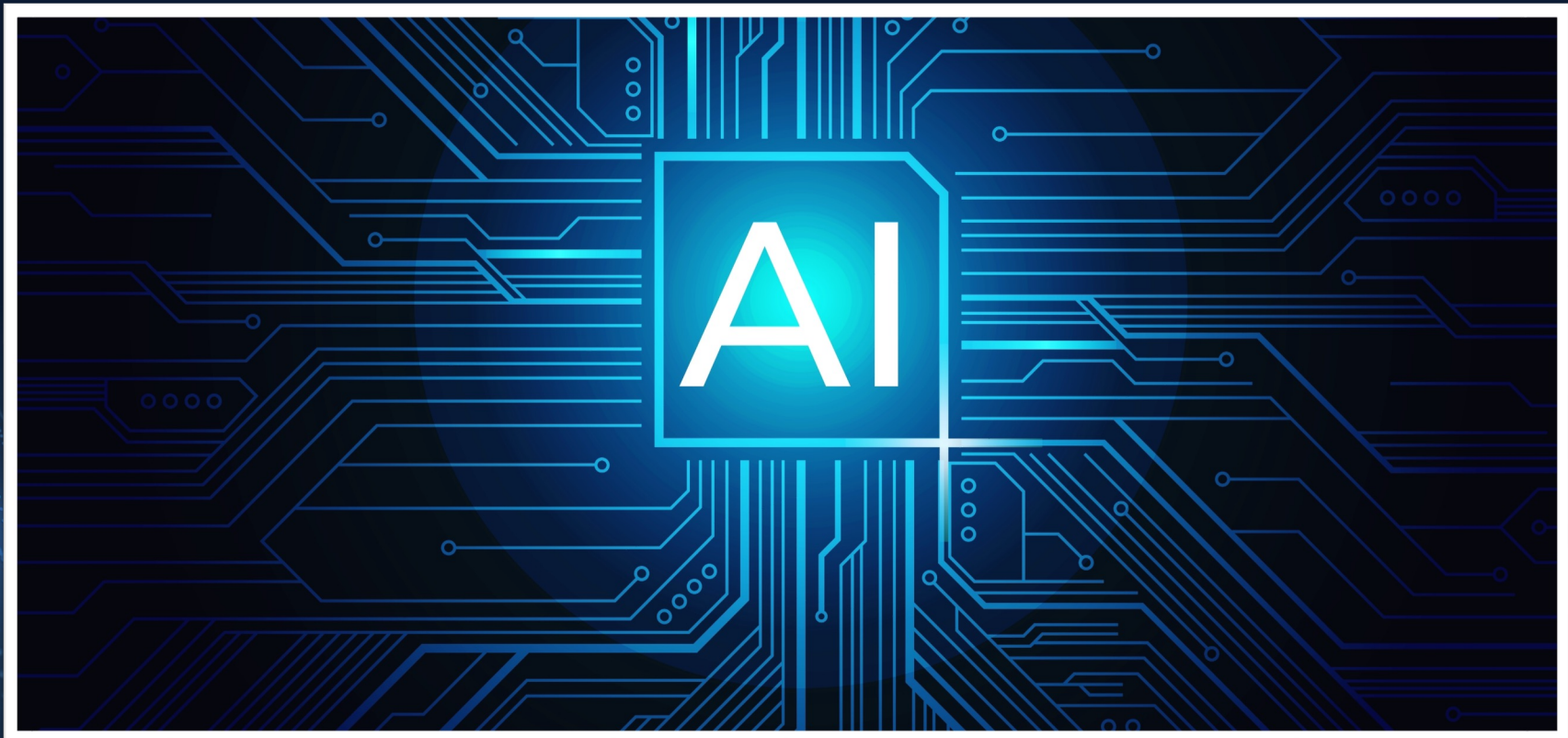
SIGNIFICANT INCREASES IN M&A



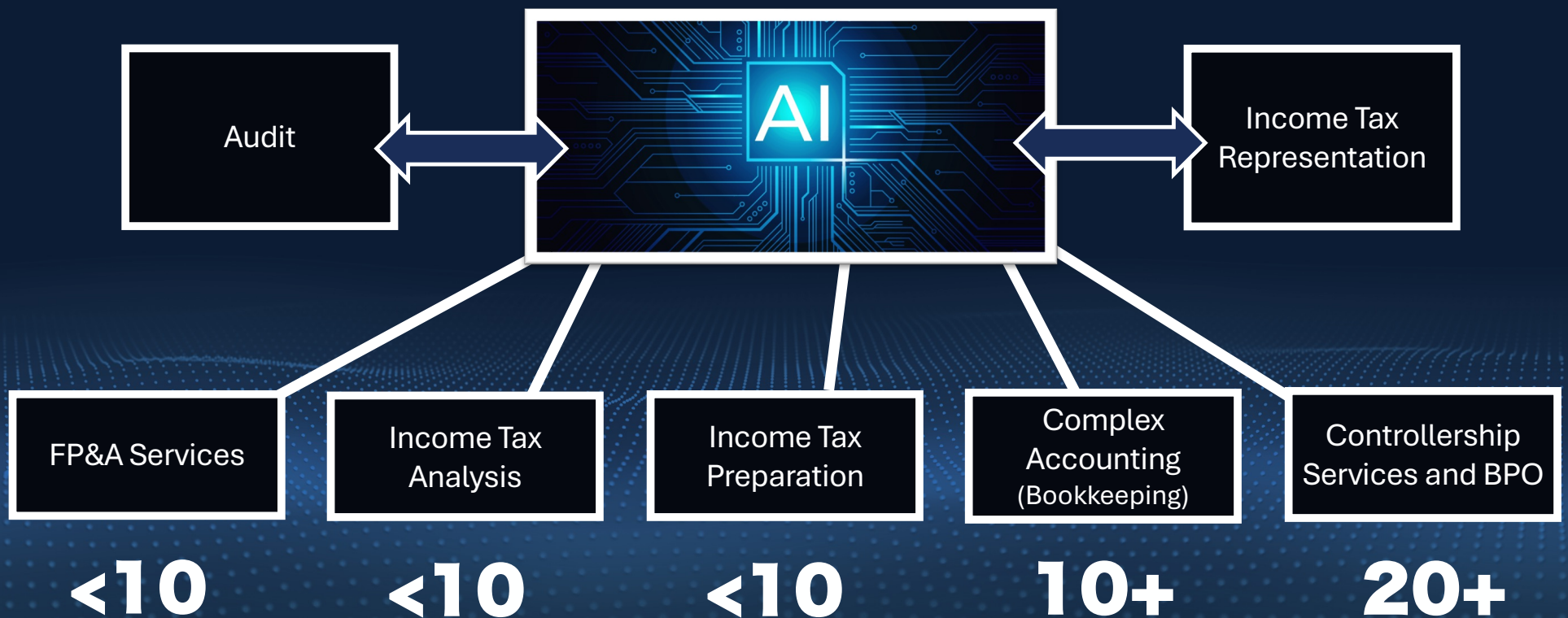
EXTREME AUTOMATION



ARTIFICIAL INTELLIGENCE



SEQUENTIAL IMPACT OF AI ON THE PROFESSION



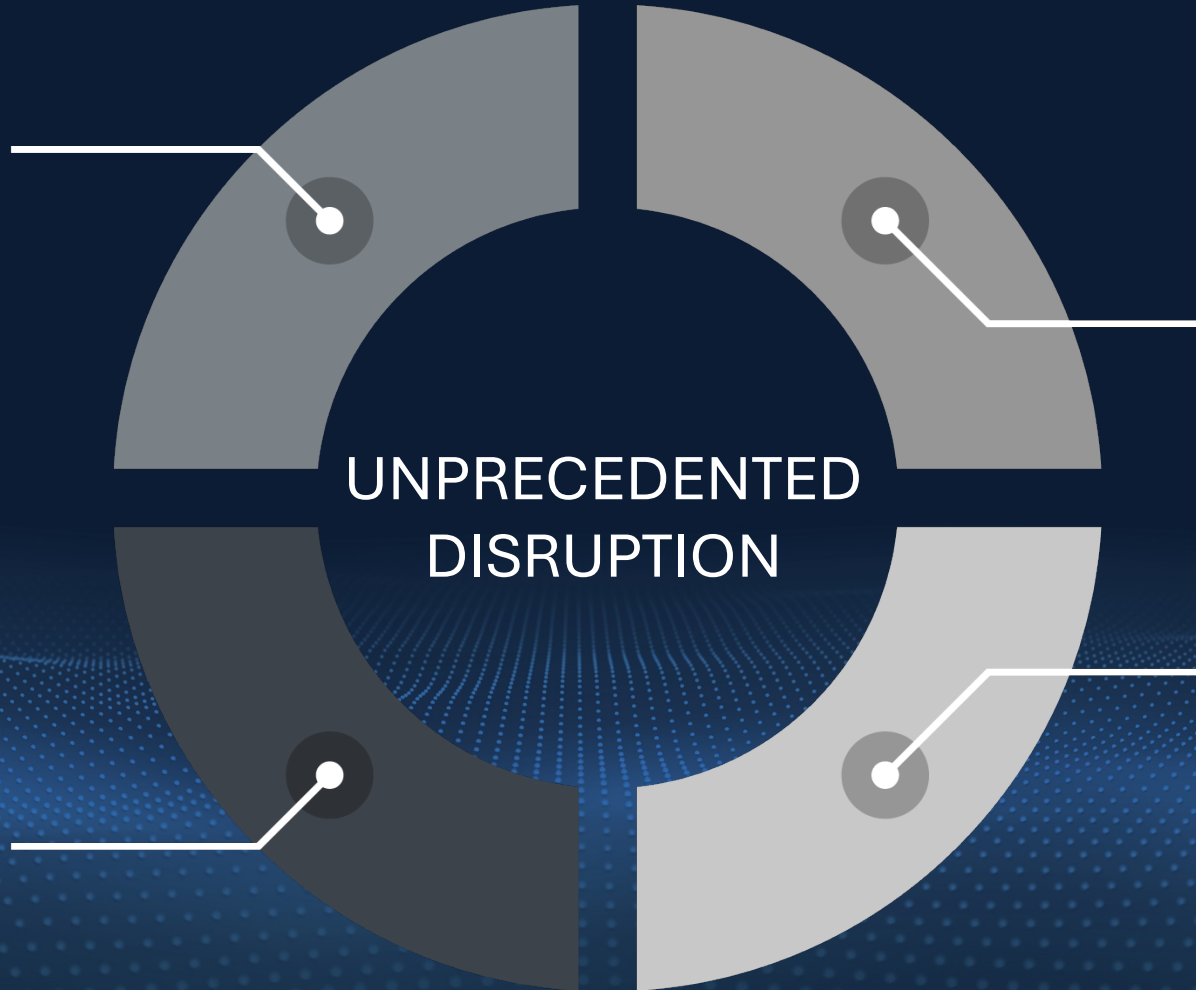
Changing
Advisory
Landscape

Significant
Increase
in M&A

Extreme
Automation
of Entry

Artificial
Intelligence

UNPRECEDENTED
DISRUPTION



Changing
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OPPORTUNITY



THE BOLDLY GO JOURNEY



DISRUPTION

OPPORTUNITY

LEADERSHIP

DIRECTION

COURAGE

THE BOLDLY GO JOURNEY



SCALING NEW HEIGHTS 2024

SCALING NEW
HEIGHTS 2025



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ROADBLOCKS



ROADBLOCK 1: PROCRASTINATION



The diagram consists of three dark gray circles arranged horizontally. Each circle has a thin white outline and contains white text. The circles are set against a dark blue background with a subtle pattern of small white dots. The first circle on the left contains the word 'FUN', the middle circle contains 'EASY', and the third circle on the right contains 'PREDICTABLE'.

FUN

EASY

PREDICTABLE

ADDITIONAL ROADBLOCKS

2. Squirrels

5. Hyper Analysis

3. Weariness

6. Rescuing

4. Obsession

7. PSYCHOLOGICAL ROADBLOCKS

Worry is mental energy spent on things that may or may not happen.



The inoculator of worry is **planning**.

7. PSYCHOLOGICAL ROADBLOCKS

Dread is mental energy spent on things
that are inevitable.



The inoculator of dread is
planning...though mostly responsive.

7. PSYCHOLOGICAL ROADBLOCKS

Fretting is mental energy spent on things over which you have no control.



The inoculators of fretting is acceptance and adaptation.

7. PSYCHOLOGICAL ROADBLOCKS

Strife is the result of interactions with imperfect people, exaggerated by the pursuit of justice.



The inoculators of strife are grace and mercy.

7. PSYCHOLOGICAL ROADBLOCKS

Guilt, Regret and Remorse are the punishment of ourselves for our past failures.



The inoculator of guilt, regret and remorse is forgiveness.



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PRIORTIZATION



THE EISENHOWER MATRIX

1

IMPORTANT AND
URGENT

IMPORTANT NOT
URGENT

2



3

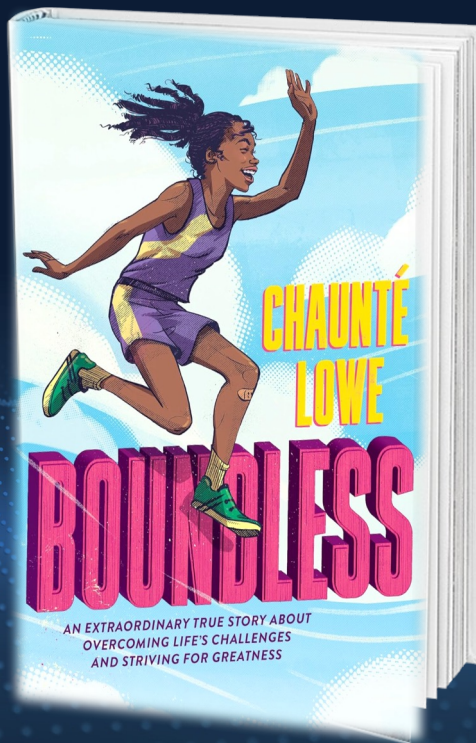
URGENT NOT
IMPORTANT

NOT URGENT OR
IMPORTANT

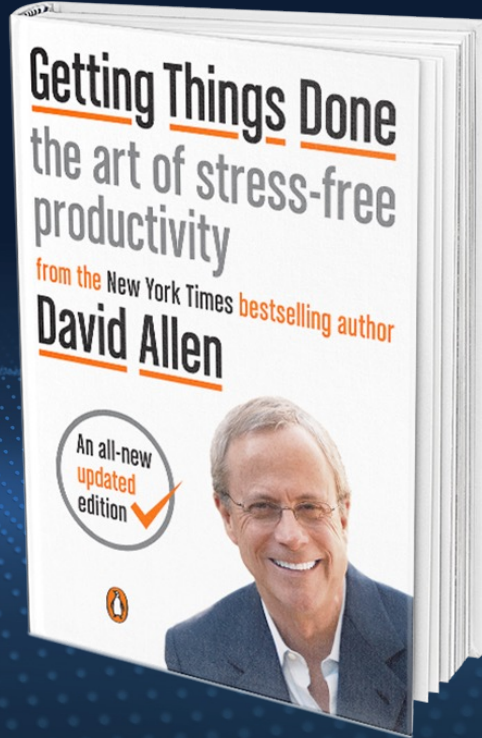
4



INSPIRATION TO CREATE ACTION



A METHODOLOGY TO CREATE ACTION



→
MAKE IT
→

SO
→

 **Scaling
New Heights**