

Gather 2026 CPE Information

CPE information:

CPE available: 12

Field of Study: Business Management & Organization

Program Level: Overview

Prerequisites: None

Advance Preparation: KPI submissions; Streamlined OS Assessment

Delivery Method: Group Live

Dillon Business Advisors is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Refunds and cancellations: We do not offer refunds for online or in-person events. For more information regarding refund, complaint, and/or program cancellation policies please contact our offices at 281-578-2002.

Session Descriptions and Learning Objectives:

Day 1/Session 1 - The Future Isn't Waiting

Description: The firms that thrive won't simply react to change—they'll anticipate it. Join Marcus and Rachel Dillon as they share practical tools for cultivating curiosity, managing change, and turning innovation into a way of working.

CPE Learning Objectives:

- Identify strategies to proactively respond to industry change and innovation.
- Define frameworks to build a culture of curiosity and continuous improvement within a firm.

Day 1/Session 2 - Firm Olympics: Compete, Collaborate, Celebrate

Description: One of the highest-rated sessions from last year's event returns with new challenges, fresh scenarios, and even more opportunities for collaboration. Firm owners, leaders, and team members will rotate through a series of timed stations designed to solve

real-world firm challenges, share best practices, and uncover innovative solutions. Expect energy, friendly competition, and practical takeaways.

CPE Learning Objectives:

- Identify opportunities to improve workflows through collaborative problem-solving.
- Define team-based strategies to address common accounting firm challenges.

Day 1/Session 3a - Proof in the Numbers

Description: Real improvement leaves evidence. Using aggregated KPI data from participating firms, we'll uncover where firms are making measurable gains and how Streamlined OS is helping turn operational discipline into better results.

CPE Learning Objectives:

- Interpret KPI data to evaluate firm performance trends.
- Identify operational drivers that influence key performance metrics.

Day 1/Session 3b - Prioritize Like a Pro

Description: The difference between being busy and being effective is knowing what deserves your attention. Learn a practical approach to getting the right work done at the right time, making confident decisions about competing priorities, and staying ahead instead of catching up.

CPE Learning Objectives:

- Distinguish between high-value and low-value tasks using prioritization frameworks.
- Define decision-making techniques to manage competing responsibilities.

Day 1/Session 4a - Building AI Guardrails

Description: AI creates tremendous opportunity, but it also introduces risk. Identify policies, expectations, and guardrails to encourage adoption while protecting quality and client trust.

CPE Learning Objectives:

- Identify key risks associated with AI usage in accounting firms.
- Develop policies and guardrails to ensure responsible and controlled AI adoption.

Day 1/Session 4b - What Teams Need to Succeed with AI

Description: AI can help teams work smarter, but uncertainty slows adoption. Identify training, tools, guidance, and freedom needed for success.

CPE Learning Objectives:

- Identify barriers that prevent effective AI adoption among team members.
- Identify training, tools, and support structures needed to enable confident AI usage.

Day 1/Session 5 - AI Without Chaos: Freedom and Control

Description: AI presents both opportunity and uncertainty. While leaders are thinking about risk, quality, and accountability, team members are looking for clarity, confidence, and permission to innovate. In this interactive session, owners, leaders, and team members will explore both perspectives, share insights, and work together to identify the guardrails, expectations, and support needed to create an AI-enabled firm that balances innovation with responsibility.

CPE Learning Objectives:

- Identify risks and opportunities associated with AI adoption in accounting firms.
- Develop guidelines that balance innovation with quality control and accountability.

Day 1/Session 6 - From Alignment to Action

Description: After exploring what leaders need from their teams and what teams need from their leaders, it's time to put those insights into practice. Learn how to identify high-impact use cases and create reusable AI assets, including prompts, skills, memories, and workflows, that improve speed, quality, consistency, and knowledge sharing across your firm.

CPE Learning Objectives:

- Create reusable AI prompts to improve workflow efficiency.
- Develop systems for organizing and sharing AI resources across teams.

Day 2/Session 1 - Prioritizing People

Description: Make work personal by elevating the humans at the center of your firm—both your team and your clients—and strengthening the relationships that hold your business together. Explore why relationships are the foundation of lasting success.

CPE Learning Objectives:

- Analyze the role of relationships in firm success.
- Define strategies to improve team and client engagement.

Day 2/Session 2a - Navigating the Next Wave

Description: From technology investments to talent and growth, firm leaders are facing no shortage of opportunities, or decisions. Join Amy McCarty, Marcus Dillon, and Angel Sabino for an open discussion about the trends shaping today's accounting firms. Bring your questions,

hear perspectives from peers, and participate in a conversation focused on what's next for the profession and your firm.

CPE Learning Objectives:

- Identify emerging trends impacting accounting firms.
- Evaluate strategic responses to industry changes.

Day 2/Session 2b - SOS: Rescuing Sales-Onboard-Service

Description: The handoff from sales to service shouldn't create confusion, bottlenecks, or delays. Learn how to streamline onboarding, engage the right team members at the right time, and create an experience that builds client confidence from day one. Leave with practical strategies that help teams onboard faster while delivering exceptional client experiences.

CPE Learning Objectives:

- Identify common inefficiencies in client onboarding.
- Define strategies to improve onboarding experience and workflow.

Day 2/Session 3 - Choosing the Right AI Investments for Your Firm

Description: This session moves firms from experimentation to focused action by evaluating the tools, solutions, and strategies. Through real-world examples, vendor showcases, and role-specific discussions, learn how to identify the AI investments that align with firm goals and priorities. Leave with greater confidence, clear priorities, and a focused plan for what comes next.

CPE Learning Objectives:

- Identify role-specific applications based on efficiency, risk, and firm priorities.
- Evaluate tools and strategies to improve efficiency using AI.

Day 2/Session 4 - Build Your 2027 Firm Roadmap

Description: Building on the ideas and strategies explored at Gather 2026, this interactive workshop focuses on identifying each firm's most important priorities for the coming year and creating a practical roadmap that aligns people, processes, technology, and growth goals.

CPE Learning Objectives:

- Evaluate and select proven strategies from peer firms that can be adapted.
- Define shared ideas to improve firm processes and performance.