

A background photograph showing the lower bodies and legs of several people standing around a table. They are stacking large, light-colored wooden blocks on top of each other. The scene is brightly lit, likely from a window in the background, creating a warm, sunlit atmosphere.

# Empowering Sustainable Growth

Staverton Park Hotel, Daventry  
9<sup>th</sup> & 10<sup>th</sup> October





# chartergroup conference



## Empowering Sustainable Growth

Staverton Park Hotel, Daventry  
9<sup>th</sup> & 10<sup>th</sup> October

Join us for an exciting and interactive conference where innovation meets collaboration and empowered growth takes centre stage! Industry experts from across the field will be joining us to share insights, spark new ideas, and engage in meaningful discussions.

Don't miss this opportunity to learn, connect, and be inspired!

### KEY SPEAKERS:

#### CHARTING A COURSE THROUGH THE TECH MAZE

Speakers: **Derek Southall & Helen Daly**

Two of the most respected names in legal innovation and digital strategy, Derek Southall and Helen Daly run independent advisory and implementation consultancies. With extensive experience helping professional services firms navigate complex digital landscapes, they specialise in innovation, operational excellence, and strategic tech planning.

In this eye-opening session, Derek and Helen will tackle the evolving tech minefield that firms are facing today. From the overwhelming promise of AI to the practical roadblocks such as adoption resistance and tech knowledge gaps, they will offer pragmatic guidance on how mid-tier firms can architect tech stacks that truly support growth and client service. Expect insight into designing for commoditisation, unlocking productivity, and leading successful IT change while managing risks and fostering a culture of adoption.







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## PEOPLE: THE KEY TO WINNING IN A TECH-DRIVEN WORLD

Speaker: **Paul Richmond**

A renowned expert on leadership and people strategy, Paul Richmond brings a fresh perspective on how firms can adapt to the shifting expectations of today's workforce. With deep insight into HR transformation, he helps organisations align their people strategy with business goals in a rapidly changing landscape.

In this session, Paul will explore why people, not just technology, remain the ultimate differentiator. He'll examine how firms can evolve their talent approach, from redefining career paths to attracting next-gen professionals and adapting to the impacts of AI on training and development. Packed with insights on mindset shifts, performance management, and bridging generational gaps, this session is essential for any firm looking to build a future-ready workforce.

## MARKETING YOUR FIRM TO THE TALENT OF TOMORROW

Speaker: **Callum Macrae**

Callum Macrae is a leading voice in brand strategy and professional services marketing. As Marketing Director at JE Consulting, he helps firms sharpen their employer brand, attract top talent, and build compelling narratives that resonate with the next generation.

In this session, Callum unpacks why the talent pipeline isn't broken, but firm messaging often is. He'll highlight what top-performing firms are doing differently, how to realign internal culture with external branding, and the changes you need to make to truly stand out as an employer of choice. If you want to attract and retain top talent while ensuring consistency across your firm, don't miss this session.

## NAVIGATING CHANGE: THE ICAEW PERSPECTIVE

Speaker: **Alan Vallance, CEO, ICAEW**

As Chief Executive of ICAEW, Alan Vallance is leading the charge on transformation within the profession. With a background in strategy, innovation, and leadership, Alan brings a future-focused view on the changing role of firms in the UK economy.

This keynote will explore the critical market themes reshaping the profession, from shifting client expectations and tech disruption to consolidation trends and ICAEW's evolving priorities. Alan will offer a forward-looking vision for how firms can stay relevant, resilient, and respected in the years ahead.





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## PANEL DISCUSSIONS:

### EXPERT PANEL DISCUSSION 1 – **TECH-DRIVEN GROWTH: LESSONS, CHALLENGES & PRIORITIES**

Session: **Industry Expert Panel Discussion**

Join a dynamic panel of industry leaders and member firm representatives for a candid conversation about tech-driven growth. They'll reflect on key insights from the earlier sessions, explore how firms are leveraging technology to boost productivity and deliver deeper client insight, and share success stories—along with some cautionary tales.

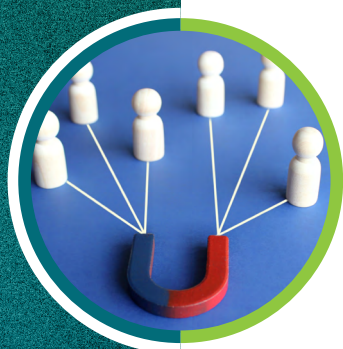
Expect actionable takeaways on top tech priorities, how to manage integration and adoption challenges, and advice on avoiding common pitfalls. Whether you're just starting your tech journey or fine-tuning your digital strategy, this panel promises practical perspectives and firm-tested lessons to help shape your next moves.

### EXPERT PANEL DISCUSSION 2 – **NEXT-GEN TALENT: MAKING YOUR FIRM A MAGNET FOR EMERGING PROFESSIONALS**

Session: **Industry Expert Panel Discussion**

This lively panel brings together HR and industry leaders to discuss how firms can better connect with emerging talent. With experience across a range of firm sizes and approaches, panellists will share what's working, what's not, and how recruitment strategies are evolving—whether that's engaging school leavers, refining messaging, or choosing new channels.

Expect honest dialogue about cost pressures, training strategies, and how to harmonise internal culture with external talent messaging. This is a must-attend session for those looking to future-proof their talent pipeline and make their firm a top destination for the professionals of







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## WORKSHOPS:

### MASTER THE INTERVIEW

**Lorraine Twist, Hays**

**Hire smarter, faster, and fairer.**

Learn how to structure and lead interviews that truly uncover the best candidate for your role. Lorraine Twist brings expert guidance on crafting targeted questions, reducing bias, and evaluating cultural fit. Packed with practical exercises, this workshop will sharpen your hiring skills and help you build stronger, more inclusive teams.

### CULTURE FIT? OR CULTURE FIX?

**Callum Macrae, JE Consulting**

**If talent's not choosing you, it might not be the job, it might be your culture.**

Callum Macrae tackles the often-ignored disconnect between perceived and actual workplace culture. This interactive session helps you re-align internal values with external messaging, turning culture into a genuine talent magnet. Discover how to attract people who don't just fit your culture, but elevate it.

### SAFEGUARDING GROWTH: RISK, REGULATION & RESILIENCE

**Ian Saxelby (Lockton) & Kerrie Machin (Mitigo)**

**Growth means risk, unless you manage it well.**

From cyber threats to compliance hurdles, this session shows you how to turn risk into a strategic asset. Ian Saxelby and Kerrie Machin offer expert insights on managing operational risk, strengthening governance, and building resilient businesses that grow with confidence. Ideal for leaders ready to future-proof their firm.

### SCALING WITHOUT COMPROMISE

**Mercia Group**

**Growth is great, until quality starts to slip.**

This session is for ambitious firms who want to scale without sacrificing standards. Amir Hussain explores the pitfalls of rapid expansion and how to embed quality at the core of your growth strategy. Learn how to maintain consistency, align teams, and measure performance as you grow.





## Day One:

Coffee and exhibition

**Introduction to conference**

**Charting a course through the tech maze – Derek Southall & Helen Daly**

**Panel Discussion and Q&A** - Tech-Driven Growth: Lessons, Challenges & Priorities

Coffee & Exhibition

**Workshops: Round One**

Lunch & Exhibition

**PEOPLE: The key to winning in a tech-driven world – Paul Richmond**

**Culture Code: - Callum Macrae**

Coffee & Exhibition

**Panel Discussion and Q&A** - Next-Gen Talent: Making your firm attractive to emerging professionals

**Workshops: Round 2**

End of Day One

***End of Day One is followed by Champagne Reception and Gala Dinner***

## Day Two:

Coffee & Exhibition

**ICAEW update and Q&A**

Coffee & Exhibition

**Guest Firm**

**Talk is cheap, Actions speak – Paul Richmond**

**Final comments**

Lunch & Exhibition

Conference End





## How to Join us:

Register online by **scanning the QR code** or:

Email: **[nikki.white@chartergroup.co.uk](mailto:nikki.white@chartergroup.co.uk)**

Phone: **07798 907628**

