

ConvergenceCoaching, LLC

Helping Leaders Achieve Success

Practice
Consulting
Training
and
Development

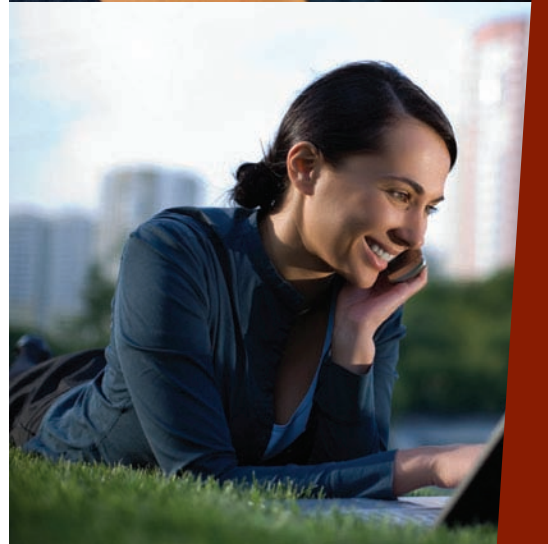
Channel
Consulting



www.convergencecoaching.com

www.convergencelearning.com

blog.convergencecoaching.com





About Our Firm



Convergence Coaching, LLC is a leadership and marketing coaching and consulting firm whose mission is to help CPA and IT firms and the organizations that serve those professions achieve success.

We do this by providing our clients:

Practice Consulting | Helping you assess your practice, create unified strategic plans, and then develop strategies to achieve your vision. In addition, we provide leadership team coaching and assist in implementing your identified strategies and goals.

Training and Development | Spanning all areas of CPA and technology practice management and personal development, our courses and workshops can be customized for your audience, whether for tailored in firm training, web-based training, an association conference presentation or training workshop, or a firm meeting or retreat.

Channel Consulting | Offering our experience in launching programs and developing CPA channels, coaching and training key leaders, managing large-scale projects, and assisting with revenue growth, marketing, and sales efforts while you continue to focus on your business.

Practice Consulting

At ConvergenceCoaching, LLC, our focus is to help you achieve success within the dynamic environment of practice management by assessing your firm's current state, recommending ways to capitalize on opportunities and mitigate threats, coaching your team in all areas of practice management, and adding skilled CC, LLC "teammates" who understand your practice whenever you need to expand your resources.

"The ConvergenceCoaching strategic planning process enabled us to get honest about the current state of our practice and develop a realistic plan for growth and success. We use this process each year to facilitate our partner retreats and it has helped to unify us. Their expertise in leadership and marketing has been invaluable and we rely on them for ongoing coaching and guidance as we work to position our firm for the future."

Vince L. Rettig, CPA, PFS, Managing Partner
RBSK Partners PC

**Our services can be tailored depending on your particular needs.
We provide:**

- ⦿ Strategic planning
- ⦿ Retreat facilitation
- ⦿ Succession planning
- ⦿ Partner and leadership team coaching
- ⦿ Training and team development
- ⦿ Implementation services related to:
 - Revenue growth and business development
 - Market positioning and brand consultation
 - Sales process definition
 - Human resources, including recruiting and retention strategies
 - Myers-Briggs and DISC personality assessment consulting and training
 - Partner compensation

“ConvergenceCoaching has provided the independent members of the BDO Seidman Alliance with their clear, thoughtful, and valuable insights into “best practices” of accounting firm leadership, marketing, business development, and internal communication. These are areas that are critical to the success of any accounting firm. ConvergenceCoaching is responsive and comprehensive in their efforts, and they consistently exceed the expectations of our independent member firms.”

Michael G. O'Hare, Executive Director
BDO Seidman, LLP

Training and Development

As consultants and coaches to the CPA and technology professions, we are known as industry thought leaders, consultants, and experienced speakers on topics spanning all areas of CPA and IT practice management.

All of our courses and workshops include practical exercises and ideas that attendees can put to use immediately to develop their leadership, management, and business development skills. From a two-hour web seminar to a multiple-day, on-site workshop, our courses can be tailored to meet your objectives, whether for an association conference presentation or training workshop, customized in-firm training, web-based training, or a firm meeting or retreat.

In-Firm and Web-Based Skills Building

When managing partners and firm administrators are planning their firm retreats, in-firm and web-based training activities, and other firm events, they often include ConvergenceCoaching facilitators to teach important subjects such as leadership development, succession planning, practice development, management, and human resource development.

State Society and Association Speaking

ConvergenceCoaching trainers are frequently invited to speak at major profession events to offer attendees concrete, applicable material related to business development, leadership, and human resources. We have spoken at a number of AICPA events, state society conferences, and other association meetings.

Distance Learning

At ConvergenceCoaching, we understand the need for soft skills development to compliment the technical training you provide your people. We offer quality education with the convenience of any time, anywhere online self-study so you don't need to leave town - or even the office - to gain new insights and develop as a leader.

"We value our work with ConvergenceCoaching in the expansion of our Trusted Business Advisor programs. Their understanding of the CPA profession and ability to develop product and service programs, communications strategies, and applicable tools and resources has been instrumental in generating solutions to help our members enhance the effectiveness and success of their firms and organizations."

Erik Asgeirsson, President and CEO
CPA2Biz, Inc.

Channel Consulting

Consolidation, economic, consumer, and regulatory pressures, the need to plan for succession, and finding the proper balance of new and existing initiatives are just a few examples of the changes driving CPA and IT firms today. At ConvergenceCoaching, we work with service providers, publishers, and associations serving the CPA and technology professions to expand your channel and program offerings so you can help your members better address these issues.

We are experienced in leading large and small-scale projects and in developing and launching programs for organizations that serve the CPA and IT professions with services that include:

- ⊙ Channel marketing plan development
- ⊙ Product identification and management
- ⊙ Competitive analysis and market positioning
- ⊙ Program development
- ⊙ Large-scale project management
- ⊙ Communications and go-to-market planning and execution
- ⊙ Sales program development and resource identification and preparation



Working
Together

Our Team

The ConvergenceCoaching, LLC consulting team has extensive experience in leadership management, sales, marketing, and human resources. Working together, we apply our market-focused strategic planning, in-depth project management and implementation expertise, and our passion for teaching others to help our clients make the jump from being reactive to being proactive.

Some of the benefits of working with ConvergenceCoaching include:

- ⊙ Access to our **expertise and knowledge** without the cost of additional employees
- ⊙ Our **holistic approach** designed to take your practice or organization to the next level, accelerate your profit, and grow your team, if that is your goal
- ⊙ Enhanced **peace of mind** when we help you identify and eliminate unity issues, unnecessary risk factors, or leadership burdens
- ⊙ The reassurance that you've selected a team **committed to make a difference** for you with many highly referenceable clients
- ⊙ Customized partner and staff **development programs** to increase your firm's leadership, communication, performance management, client service, and business development skills
- ⊙ Our **resources and tools** to aid in knowledge transfer so you can easily implement our strategies
- ⊙ Gaining an increased sense of **clarity, team, and focus** that ultimately results in realizing your objectives



Allow us to help you achieve success.

Visit www.convergencecoaching.com or e-mail info@convergencecoaching.com to learn more today.