



Who We are



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At ConvergenceCoaching, LLC we are a leadership and marketing coaching and consulting firm whose mission is to help CPA and information technology (IT) firms and the organizations that serve those professions – like service providers, publishers, and associations - achieve success. We do this by helping our clients assess their practices, develop unified success plans, and then develop strategies to achieve their vision. Then, if desired, we assist our clients in implementing their strategies by providing:

- Leadership coaching
- Human resources assistance
- Organizational optimization strategies
- Sales and marketing services, including:
 - Market positioning enhancement
 - Brand and lead generation programs
 - Sales process refinement
 - Other growth programs
- Customized in-firm skills building and training programs

Our Consulting Team

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

Jennifer Wilson, the company's founder and owner, leads our consulting team. Jennifer's background includes consulting leadership, channel program development and marketing management. A former Vice President of Sales and Customer Service for Sage Software, Inc. (*formerly State Of The Art, Inc.*) and former partner at BDO Seidman, LLP, Jennifer is named one of Accounting Today's 100 Most Influential People for 2007, as well as in the previous six years.



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Our Values

At **ConvergenceCoaching, LLC** we value:

- Making a genuine difference through "doing"
- Delivering high quality and 100% referenceability
- Maintaining intimacy, integrity, accountability and flexibility in all of our relationships
- Truly partnering with our clients and vendors
- Working on challenging projects and continuous learning
- Making money – for our clients, our partners and ourselves
- Being in continuous communication
- Enjoying real quality of life - for us and our clients
- Having fun

Our Clients

At ConvergenceCoaching, LLC, we help our **CPA and IT firm clients** make their practices more successful. In addition, we help **channel-oriented organizations** that serve the CPA and IT professions increase their revenue streams by providing coaching and consulting services, custom training and conference development, new channel program development, and assistance in program and product launches.

We are committed to working with growth-oriented clients who understand the value of honest self-assessment and well-planned change. Our clients:

- Want to be better leaders and make a transformational difference in their practice or organization
- Are willing to honestly assess their current state in collaboration with us, mutually determine and prioritize their areas for growth and development and drive toward success through personal coaching
- Are willing to invest leadership time and talent to the success of the relationship
- Will commit a full-time internal champion
- Want a long-term coaching relationship and are willing to be held accountable for their commitments
- Do not see geography as an issue, given our multi-office, "virtual" approach



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Benefits of Working With Us - Our Value To You

The accounting and technology professions are undergoing tremendous transformation. Consolidation, economic, consumer, and regulatory pressures, the need to plan for succession and the proper balance of new and existing initiatives are just a few examples of the changes driving our practice clients today. Service providers, publishers, and associations find that they must now expand their channel and program offerings to help their clients or members address these issues.

At **ConvergenceCoaching, LLC** our focus is to help our clients achieve success within this dynamic environment by assessing your firm's current state, recommending ways to capitalize on the opportunities and mitigate weaknesses, coaching your team in all areas of practice management, and adding skilled CC, LLC "team-mates" who understand your business or practice whenever you need to expand your resources. Some of the benefits of working with us include:

- Access to our expertise and knowledge without the cost of additional employees
- The reassurance that you've selected a team committed to make a difference for you with many highly referenceable clients
- Working with our group of trusted professionals who maintain the highest levels of integrity
- Our ability to quickly identify and/or restore your competitive advantage and differentiators
- 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
- A tailored program, designed to meet your unique objectives
- Our extraordinary breadth of soft skills courses and the ability to develop customized leadership and partner development programs for your firm
- 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

Contact Us Today!

ConvergenceCoaching, LLC

Jennifer Wilson

Office: (402) 933-2900

Fax: (402) 933-2901

jen@convergencecoaching.com

www.convergencecoaching.com