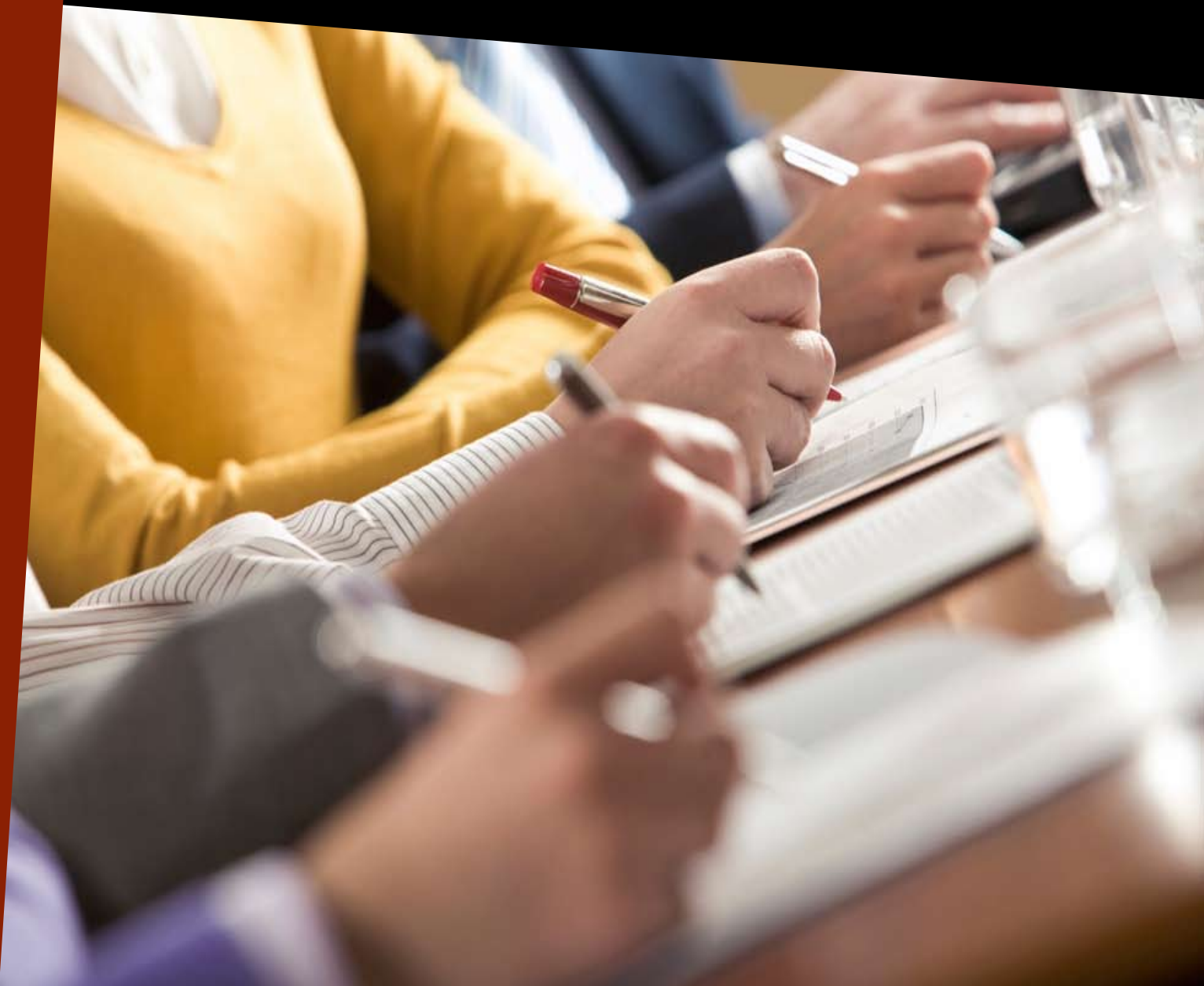


2010-2011



ConvergenceCoaching, LLC

# Course and Workshop Catalog



# Introduction


“ConvergenceCoaching consistently exceeds our expectations with outstanding workshops and courses for AICPA conferences. Our members expect quality content, engaging speakers, and pertinent topics with ideas they can apply in their practices or businesses, and ConvergenceCoaching never lets us down.”


**Robert Bouchard VP of Publishing, Professional Education, and Conferences**  
AICPA



At ConvergenceCoaching, LLC, we are known as industry thought leaders, consultants, and experienced speakers on topics spanning all areas of CPA and IT practice management. We are invited to speak and teach at major profession events, including:

- © AICPA conferences and events, including the Practitioners Symposium/TECH+ Conference, PCPS Firm Networking Group Meetings and web forums, and the Emerging Partners Conference
- © State Society conferences, including Georgia Society of CPAs, Delaware Society of CPAs, North Carolina Association of CPAs, and California Society of CPAs events
- © Association meetings, including the BDO Seidman Leadership Conference, the Association for Accounting Administration Practice Management Conference, PKF North America Managing Partner and HR Conferences, the Association for Accounting Marketing Summit, and the Information Technology Alliance Spring and Fall Collaboratives

When partners and administrators are planning their firm retreats or training and development activities for firm partners, up-and-coming leaders, and staff, they often include ConvergenceCoaching consultants to facilitate and teach important subjects such as leadership, succession planning, practice development, and performance management. Look for the “” icon for workshops especially beneficial in developing your emerging leaders. All of our courses and workshops can be tailored to meet the needs and objectives of each individual audience, whether for a large conference, smaller intimate training, customized in-firm training programs, web-based training, or a strategic planning meeting or retreat for a particular firm.

In addition, we now offer convenient anytime, anywhere online CPE self-study courses via our distance learning program. Now you and your team members can have access to our soft skills training without having to leave town - or even the office - and without having to coordinate multiple schedules. Look for the “” symbol next to the course title to find those courses available via distance learning, and go to [www.convergencelearning.com](http://www.convergencelearning.com) for more information.



ConvergenceCoaching, LLC 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 addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: [www.nasba.org](http://www.nasba.org).

ConvergenceCoaching, LLC

## Our Presenters



**Jennifer Wilson**

Jennifer is co-founder and partner of ConvergenceCoaching, LLC, a national consulting firm that develops leadership, succession, marketing, and training and development strategies for CPA and IT firms and the channel organizations that serve them. Named to Accounting Today's list of the "100 Most Influential People in Accounting," Jennifer has worked in both the public accounting and IT sectors. As a partner for BDO Seidman, LLP, Jennifer ran a national financial systems consulting group. Prior to BDO, Jennifer was Vice President of Sales and Customer services for publicly traded State Of The Art, Inc., now known as Sage Software, Inc., where she was responsible for the publisher's sales, marketing communications, education, and customer services functions.

Jennifer is a frequent speaker, teacher, facilitator, and writer within the profession and is a member of the Association for Accounting Administration, the Association for Accounting Marketing, American Marketing Association, the New Horizons Group, and the International Coaching Federation.



**Tamera Loerzel**

Tamera is a partner of ConvergenceCoaching, LLC. Providing strategic planning and tactical implementation services focused on helping her clients grow their business, Tamera leverages her past experience to ensure her clients capitalize on the opportunities facing their practices and businesses.

Tamera directed the national sales and marketing efforts of the package solutions group and managed a local consulting practice at BDO Seidman, LLP. Prior to BDO Seidman, Tamera was responsible for software sales, CPA and VAR programs, and channel marketing communications at Sage Software, Inc. Tamera served on the planning committee for AICPA TECH Conferences, has been on the planning committee and served as Chair for Information Technology Alliance (ITA) Fall Collaboratives, and has served on the AICPA Practitioners Symposium Planning Committee for 2004-2008. In addition, she has written articles for several state and national CPA publication on the topics of sales, marketing, leadership, and succession planning.



**Jack G. Lee III, CPA**

Jack is a partner of ConvergenceCoaching, LLC and brings his leadership and business development capabilities to help our clients grow and succeed. Jack was most recently a partner of Deloitte LLP and Deloitte Tax LLP with a career spanning 28 years. As Lead Client Service Partner for strategic clients such as Harley-Davidson, Johnson Controls, MillerCoors, and Actuant Corp, he led cross-functional teams to deliver Deloitte's full range of risk, tax, consulting, and financial advisory services.

Jack also served as Lead Tax Partner for the Rockwell International Tax Outsourcing Team and as Tax Managing Partner for the Milwaukee tax practice. He was an instructor for various national training programs, recruiting leader for the Chicago and Milwaukee tax practices, and held many coaching and mentoring roles. He is passionate about developing people of all experience levels to help them succeed in life and their careers.

Jack is a licensed CPA and a member of the AICPA.



**Michelle Baca**

Michelle is a consultant for ConvergenceCoaching and applies her management skills, communication and coaching abilities, and technical experience to deliver educational and motivational presentations.

Prior to joining ConvergenceCoaching, Michelle co-founded Hi-Tech Ignition Interlock, where she supervised the daily operations of its two service centers. She continues to serve as a managing member, performing business development functions and creating awareness about the effects of the drunk driving problem facing our nation. Michelle is a Certified Life and Career Coach and founder of Satisfying Career Solutions, LLC and helps clients deal with job burn-out, make successful career changes, and start their own businesses to create careers that are both personally rewarding and financially lucrative. She is a member of the International Coach Federation (ICF), CoachVille, and Toastmasters International.

## Leadership

5

Being a Leader Regardless of Your Role.....	5
Coaching Strategies for Trusted Advisors.....	5
<b>NEW</b> Coming Together – The Art of Merging.....	5
Conducting Powerful Presentations.....	6
<b>NEW</b> CPA Firm Success Metrics: Understanding Practice Economics.....	6
<b>h</b> Developing a Culture of Ownership and Accountability.....	6
Developing Motivational Compensation Systems.....	7
Developing Your Growth RoadMap™: Planning For Success.....	7
Effective Communication and Meeting Skills.....	7
Enhancing Your Critical Thinking Skills.....	8
Firm Governance, Buy Ins, Buy Outs, and Your Partner Agreement.....	8
Harness the Power of Positive Thinking.....	8
Leadership Distinctions That Will Transform Your Firm's Performance.....	9
Managing Crisis in Your Firm.....	9
<b>h</b> Managing Difficult Conversations Successfully.....	10
Managing Stress Positively.....	10
<b>h</b> Master the Art of Time Management.....	10
<b>h</b> Maximizing Your Professional Image.....	11
New Partner Sources for Your Firm.....	11
<b>NEW</b> Overcoming the Seven Deadly Sins of Delegation.....	11
Practicing in Concert - Gaining Partner and Firm Alignment.....	12
Preparing Your Firm to Run Without You (Succession Planning).....	12
<b>NEW</b> The Psychology of Letting Go – Retiring With Grace.....	12
<b>NEW</b> Talking Straight to Drive Change.....	13
<b>NEW</b> Trust: Developing It, Maintaining It, and Repairing It.....	13

## Organization & Human Resource

14

Building a Learning Culture in Your Firm.....	14
<b>NEW</b> Capitalizing on Social Media as a Strategic Communications Tool.....	14
Defining Your Organizational Roles and Responsibilities.....	15
Developing Your Team for the Future.....	15
<b>NEW</b> Driving Your Career Success.....	15
Effective People Development Strategies.....	16
<b>NEW</b> Finding Your Voice as an HR Professional in Firm Strategy.....	16
<b>NEW</b> Helping People Overcome Their Personal Pitfalls.....	16
Keys to Lasting Career Satisfaction and Success.....	17
Managing Generational Differences in Your Practice.....	17
Motivating and Managing Your People.....	18
Recruiting is a Marketing Function!.....	18
Recruiting Top Talent to Your Practice.....	18
Understanding and Managing Gender Differences.....	19
Understanding Diverse Personalities.....	19
What Are Your Organizational Ethics?.....	19

## Sales & Marketing

20

Capitalizing on Public Relations to Build Your Brand.....	20
Client Retention and Cross Selling: Mining Gold in Your Own Backyard.....	20
Creating a Differentiating Brand Identity.....	21
Delivering Exceptional Client Service.....	21
Developing a Successful Strategic Initiative or Niche.....	22
Developing Winning Proposals.....	22
Developing Your Firm's Marketing Function.....	23
Developing Your Firm's Marketing Plan.....	23
<b>NEW</b> Effective Business Writing for Busy Professionals.....	23
Embracing Social Media in Your Firm.....	24
Enhancing Client Service through Surveys.....	24
<b>h</b> Enhancing Your Networking and Social Media Skills.....	24
<b>NEW</b> Enhancing Your Sales Success.....	25
<b>NEW</b> Four Secrets for Developing a Powerful Sphere of Influence.....	25
Growing Your Practice through Referral Source Marketing.....	25
How to Sell Your Ideas, Services, or Solutions.....	26
Must Do Busy Season Marketing Activities.....	27
Packaging Your Small Business Services.....	27
Secrets to Niche Practice Success.....	27
Strategic Selling: Closing the RIGHT Business.....	28
Successful Lead Generation Strategies.....	28
Successfully Managing Your Sales Process.....	28
Telling Your Firm's Story.....	29
When New Deals Aren't Closing: Strategies for Problem Solving.....	29

## Workshops

30

### Leadership

<b>NEW</b> Coming Together – The Art of Merging.....	31
<b>h</b> Delivering Compelling Presentations.....	31
Developing a Culture of Leadership and Accountability.....	31
<b>h</b> Leadership Fundamentals, Communication, and Meeting Facilitation Skills.....	32
Staff and Administration Development: Personal Productivity and Professionalism.....	32
Succession Planning Workshop.....	33
<b>NEW</b> Women as Powerful Leaders and Communicators.....	33

### Organization & Human Resources

<b>h</b> Managing Diverse Work Teams.....	34
<b>h</b> Recruiting, Retaining, and Motivating the Best and the Brightest.....	34
Recruiting, Retaining, and Performance Management – an Advanced Study.....	34
<b>NEW</b> <b>h</b> Successful Business Development and People Management Strategies.....	35

### Sales & Marketing

<b>h</b> Business Development Workshop.....	36
<b>h</b> Deepening Your Client Relationships to Enhance Your Value.....	36
<b>h</b> Delivering Exceptional Client Service.....	37
Developing Niche Opportunities.....	37
<b>NEW</b> <b>h</b> Developing Your Sphere of Influence.....	38
<b>NEW</b> <b>h</b> Successful Business Development and People Management Strategies.....	35
<b>h</b> Successful Sales Strategies – Fundamentals and Techniques.....	38

While the majority of these courses are 75 to 100 minutes, we can customize or expand any course or develop new courses for specific needs relating to leadership, sales, marketing, and organizational topics.

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The material contained in this catalog is current as of August 2010 and is subject to change without notice. Please contact us for the most current information.

ConvergenceCoaching, LLC

# Leadership

## Being a Leader Regardless of Your Role

No matter what position you hold in your accounting or consulting firm, your ability to lead will determine the extent of your success. Leadership skills enable you to guide clients effectively, get team members and firm leadership to buy in to your ideas, and develop the respect and reputation you need to get ahead.

Attend this session to explore leadership fundamentals including:

- ⦿ Identifying key leadership attributes and activities
- ⦿ Evaluating who you are as a leader
- ⦿ Methods for enrolling others in your vision
- ⦿ Developing an action plan for strengthening your ability to lead, regardless of your role!

## Coaching Strategies for Trusted Advisors

Providing answers and delivering specialized service are important aspects of our role as consultants and CPAs. Even so, these services are often tactical and may not provide the level of benefit or ROI your clients are looking for. In this session, we'll explore methods for expanding your role to include coaching and advisory services and methods that will move you up the value chain in your client relationships and enable you to more strategically impact your clients' businesses. Attend this session to:

- ⦿ Understand the differences between consulting and coaching
- ⦿ Learn the basics of a coaching methodology
- ⦿ Explore methods for expanding your role with clients (and staff) to that of coach

⦿NEW!

## Coming Together – The Art of Merging

Whether you're bringing in a new partner from the outside, purchasing a niche specialty practice, or merging with another firm, navigating the nuances to ensure success can be tricky. In this session, we'll remove the mystique of what it takes to bring two entities together so that you can enjoy the synergies of a larger, stronger practice. We will discuss best practices including:

- ⦿ Identifying the due diligence that HAS to be done – and not just the financial aspects – to be sure you're a fit or identify red flags to address before moving to the next phase
- ⦿ Establishing a means for valuing the practice that will work today and in the future
- ⦿ Updating your partner agreement and your buy-sell agreement to ensure it addresses the critical components to minimize conflict in the future
- ⦿ Developing a communications plans to share your strategies with your team, clients, and others in the right timing

Leave this session with a clear action plan of the steps you need to take to set you and your team up for a successful merger!

## Conducting Powerful Presentations

Presenting your ideas with power and persuasion is a critical leadership skill and is both an art and a science. Attend this session and explore a methodology and the nuances of developing and delivering powerful presentations tailored for your audience, including:

- ⦿ Exploring the natural inhibitors we experience when speaking to groups of people
- ⦿ Learning how to research, organize, and develop effective presentations
- ⦿ Practicing important presentation and facilitation techniques to keep your audience engaged
- ⦿ Accessing tools and resources to help develop your skills as a powerful presenter

Leave this session with confidence to develop and deliver effective presentations to ensure your message is heard!

NEW!

## CPA Firm Success Metrics: Understanding Practice Economics

Ensuring your firm's profitability is essential in today's economy, but the professional services business model isn't that intuitive. Many of us struggle to get our arms around the various "levers" in our practices that influence profitability and success. Attend this session to explore the various elements of practice economics including:

- ⦿ Understanding various CPA firm success metrics, such as fees per partner, income per partner, leverage, chargeability, realization, utilization, and more
- ⦿ Identifying the integration between the various metrics, the risks of statistic manipulation, and the need to focus on the right metrics for your firm
- ⦿ Discussing ways that you can influence firm profitability in the way you manage your people and engagements

Leave this session with a clearer picture of how you can affect the financial mechanics that drive practice profitability and success!

## DL Developing a Culture of Ownership and Accountability

In this course we will explore the foundational leadership attributes that, when applied, will transform your practice. Learn how accountability, integrity, and ownership applied together can dramatically increase the functionality, effectiveness, and motivation of your team. Complete this course to:

- ⦿ Explore the two foundations of accountability – integrity and ownership
- ⦿ Gain a method for taking ownership of your clients, projects, and initiatives
- ⦿ Learn the fundamentals of delegation and meeting facilitation so you're assigning ownership to others
- ⦿ Discuss different strategies that lead to accountability

Upon completion of this program, you will have the clarity to incorporate integrity, ownership and accountability for yourself and within your practice to help achieve your firm's vision.

## Developing Motivational Compensation Systems

Attend this session to discuss the sometimes complex, always controversial topic of compensation. We'll explore best practices in compensation and motivation and discuss methods to ensure that your compensation model encourages the behaviors you need to ensure your firm's success. In this session, we'll:

- ⊙ Examine several different compensation methods
- ⊙ Explore motivation and its drivers
- ⊙ Evaluate potential changes you should consider
- ⊙ Discuss possible methods for implementing compensation changes while minimizing disruption

## Developing Your Growth RoadMap™: Planning For Success

Most firms have tried many planning methods, most notably conducting strategic planning retreats and developing "strategic plans" for their initiative or practice. Unfortunately, many discover that as the calendar rolls around, most of the great ideas they generated haven't been implemented.

In this session we'll explore a consistent and ongoing methodology for identifying your focal strategies for the year and then implementing the priority actions that will make the most positive impact on your practice, department, or service line. Attend and learn how to:

- ⊙ Distinguish the elements and core constructs of a plan – for your firm, project, or even a client
- ⊙ Take an honest look at your practice, initiative, or service line
- ⊙ Quickly identify the highest impact actions you can take to grow or improve
- ⊙ Identify methods for organizing your team and communicating your plans
- ⊙ Develop a "corporate" process for accountability that ensures that those actions are taken and results are produced

## Effective Communication and Meeting Skills

Meetings, meetings, and more meetings! In many organizations, it seems that there are more of them but not necessarily more positive results. If you want to maximize your communication and meeting skills, attend this session to:

- ⊙ Examine the basics of communication inputs and outputs
- ⊙ Explore common practice communications and how to improve them
- ⊙ Learn a meeting methodology to help you run the most effective meetings
- ⊙ Develop an accountability mechanism to help ensure the commitments made in communications and meetings are kept

You'll learn how to make your communications and meetings optimally effective so that you can have more productive interactions with your team, your clients, and others.

"We have hired ConvergenceCoaching for several years and are more pleased with each engagement. The presentations have helped our event attendees with invaluable expertise in leadership, human resources, and marketing. Whether it is an all-day workshop or an hour-long presentation, the ConvergenceCoaching team always brings us the latest information in a dynamic and professional manner. We couldn't provide the level of education we do without their support."

**Kim Fantaci, Executive Director**  
Association for Accounting Administration

## Enhancing Your Critical Thinking Skills

The ability to solve problems using critical thinking skills is vital to your credibility and success as a trusted advisor. Understanding the complexity of the issues you face with clients, colleagues, and employees and developing solutions that first consider the quality of the information, identify the options, and foresee potential options and outcomes takes a special ability. In this session, we will explore:

- ⊙ Critical thinking issues and challenges
- ⊙ Various methods of evaluating available information and arguments to ensure clarity, credibility, accuracy, relevance, significance, and fairness
- ⊙ Ways to recognize and reduce your bias and emotion when facing issues
- ⊙ A step-by-step methodology to employ in problem solving
- ⊙ Questions to ask yourself to ensure your thought processes are valid

Leave this session with the tools you need to boost your ability to think critically and solve problems!

## Firm Governance, Buy Ins, Buy Outs, and Your Partner Agreement

How do your firm's key decisions get made? How many partners must agree to move strategic issues forward? How will your practice be valued upon retirement? Is it the same for when a new partner buys in? These are all issues that should be addressed in your partnership or operating agreement.

These often misunderstood aspects of a partnership become critical and sometimes divisive when firm changes cause you to apply them. In this session, we'll explore things to consider when creating or updating your partner agreement and determining the governance of your firm, including:

- ⊙ Identifying the roles, responsibilities, and decision-making authority of the partners and key administrative roles
- ⊙ Exploring ways for determining buy/sell and retirement values
- ⊙ Understanding the essential elements that should be included in all partner agreements

## Harness the Power of Positive Thinking

Positive and negative thinking are both contagious. Powerful leaders understand that focus, belief, and positive communication are all required to instill confidence and allow teams to produce incredible results. Attend this session to harness your own power of positive thinking and learn:

- ⊙ How your inner dialogue can be trained to empower and inspire you – even though it probably isn't consistently working that way now!
- ⊙ Methods for focusing your mind on the positive
- ⊙ Techniques to achieve success including:
  - Goal setting
  - Affirmations
  - Visualization
  - Centering or meditation

Leave this session with real, practical actions you can take to begin accessing more power and positivity!



“ConvergenceCoaching facilitated our Partner Retreat, expertly leading us through a well defined process of improving our communication and teamwork as a partner group and delivering pertinent follow up assignments, ensuring accountability. We have been conducting Annual Partner Retreats since 1980 and the evaluations of this retreat and ConvergenceCoaching were off the charts! Convergence is currently assisting us with a specific position succession planning engagement and we even had them return to facilitate another Retreat!”

**Jack E. Hinsche** *Managing Partner Emeritus*  
 Windes & McClaughry Accountancy Corporation

### Leadership Distinctions That Will Transform Your Firm’s Performance

This engaging and interactive discussion will explore our top leadership ideas that, when applied, dramatically increase teamwork, motivation, ownership behaviors, and accountability. In this half-day session, we’ll explore:

- ⦿ Integrity and what it really means in practice
- ⦿ Self-interest and how it drives behavior in partnerships and teams
- ⦿ Interpretations and how they affect communication
- ⦿ Ownership and how to entice your people to take it
- ⦿ Accountability and the four most important ways to make it cultural

### Managing Crisis in Your Firm

It happens when you least expect it. A key partner leaves. A high-profile client sues. A significant mistake is made. Misconduct occurs. Who you are during these situations, and how you choose to deal with them, directly affects the significance of their impact to your firm.

Attend this interactive session to enhance your ability to manage crisis situations —big and small—that arise in your firm. Leave this session with the information you need to implement the three critical steps necessary to manage a crisis.



## DL **Managing Difficult Conversations Successfully**

Our roles as leaders and managers are filled with opportunities to manage, or avoid, conflict. However, well-managed conflict can promote change and create opportunities in your firm. Attend this course to gain confidence in managing conflict in your life and learn how to:

- ⊙ Identify your current conflict management style
- ⊙ Understand the underlying causes of conflict situations
- ⊙ Develop a strategy for handling conflict situations more strategically and with more success

Leave this session with the tools you need to handle conflict collaboratively and ideas you can put into action right away!

## **Managing Stress Positively**

With busy lives and demanding careers, today's professionals face a variety of stressors - some good and some bad. Your ability to manage pressure and demands can affect productivity, client satisfaction, workplace morale, and retention. In this session, we'll explore:

- ⊙ Factors that can lead to stress in your personal and professional life
- ⊙ Ideas to help you reduce your stress
- ⊙ Actions that your organization can take to mitigate stress

Leave this session with an action plan to reduce the stress in your workplace and your life!

## DL **Master the Art of Time Management**

You can't change the number of hours in a day, but you can find ways to use your time more efficiently. In this session, we will discuss methods for achieving peak performance. Armed with a strategy for tackling the things on your to-do list, you will be less overwhelmed, more focused, and more productive. Attend this session to explore:

- ⊙ Explore the challenges to effective time management
- ⊙ Take a look at how you spend your time and learn a framework for spending your time on the things that matter most
- ⊙ Examine goal setting and accountability as they relate to effective time management
- ⊙ Learn strategies for creating a more productive environment

Leave this session with effective time management strategies that promote maximum performance and productivity!

## DI Maximizing Your Professional Image

Success in the business world is a result of job knowledge, human relations, and professional demeanor. The mark of professionalism does not depend upon what you do for a living, but instead on how you do it. The way you look, speak, write, act, and work – or your professional image – impacts your success. Your career will be greatly enhanced when you think and act in a manner that others can respect and appreciate. Attend this session to:

- ⊙ Discover how to convey confidence through your professional appearance and image
- ⊙ Develop a code of personal conduct or behavior that demonstrates respect for your organization, co-workers, clients, prospects, and others
- ⊙ Learn today's manners and etiquette for various business situations

Leave this session with ideas to significantly enhance your professional image and be seen as a credible and sought-after resource!

## New Partner Sources for Your Firm

Attend this session to explore the different methods and sources you have to bring new partners up or into your firm. In this session, we'll discuss potential partner sources, including developing partners from within your firm's current talent pool and recruiting partners to join the firm. In this session, we'll focus on:

- ⊙ The pros and cons of bringing partners "up" or "in"
- ⊙ Methods for developing leaders inside your practice
- ⊙ Ways to know when your people are ready to make the shift
- ⊙ Areas to explore when bringing in new partner talent from the outside

Leave this session with the information you need to establish your firm's partner development strategies to secure your future!

NEW!

## Overcoming the Seven Deadly Sins of Delegation

Delegation is a leadership must-have as no organization can grow, or survive succession, without encouraging its leaders to delegate. Unfortunately, real delegation is often desired and seldom practiced. At some point or another, we're all guilty of one or more of the seven deadly sins of delegation:

- ⊙ The "do it my way" syndrome
- ⊙ Believing people are not ready yet
- ⊙ Abdicating, not delegating
- ⊙ Not providing specificity or clarity in your assignments
- ⊙ Lacking communication with others
- ⊙ Taking work back
- ⊙ Not establishing clear return and report mechanisms

Attend this session to avoid these pitfalls and gain concrete strategies for empowering and developing others through powerful delegation!

## Practicing in Concert - Gaining Partner and Firm Alignment

Too often, we allow the day-to-day issues of running our practices and delivering client service to cloud our vision for the future of the firm. Even worse, as time passes, our cloudy vision seems to differ slightly (or significantly) from the vision of our partners and our people and we lose sight of what's important and where we're headed. Attend this session to develop strategies for regaining clarity on your firm's vision, gaining buy-in and commitment on your strategies, and taking the steps necessary to drive your firm forward. We'll cover methods for:

- ⊙ Honestly assessing the current state of your practice, your service lines, and each other
- ⊙ Quickly identifying the highest impact actions you can take to grow
- ⊙ Identifying and gaining unity among the partner group on which actions you'll take first
- ⊙ Determining who will take the lead on each of the actions or initiatives you'll undertake
- ⊙ Developing a process for accountability that ensures that those actions are taken

Leave this session motivated to return to your firm and develop a plan based on clarity and collaboration.

## Preparing Your Firm to Run Without You (Succession Planning)

Whether you're nearing retirement age, considering a sabbatical, or just concerned about the fact that you're carrying too much responsibility for your firm, the issue of succession planning is probably weighing on your mind. Worse yet, the topic may feel overwhelming to address. We think you may be putting off your succession planning unnecessarily—it's easier to get started than you think.

Attend this session to have succession planning made simple and learn about:

- ⊙ Who you'll have to "be" to lead a succession planning effort
- ⊙ How to support the retiree in developing and executing a transition plan
- ⊙ Methods to market and message your succession plan
- ⊙ Managing client expectations throughout your transition
- ⊙ Navigating the financial and contractual issues of each exit

⊙NEW!

## The Psychology of Letting Go – Retiring With Grace

For many, it can be extraordinarily difficult to give up your life's work and transition into retirement. This session is designed to help those retiring, and those supporting retirees, in developing an all-new possibility for life after retirement. We'll explore:

- ⊙ Overcoming the psychological barriers involved in retirement
- ⊙ Creating and managing an operational transition plan
- ⊙ Identifying successors for the retiree's clients, referral sources, and internal assignments
- ⊙ Establishing knowledge transfer and mentoring relationships that work
- ⊙ Developing new roles that leverage retirees' wisdom and abilities
- ⊙ Aiding the retiree in creating a powerful possibility for their future
- ⊙ Managing setbacks as they occur

Retirement can be a fantastic new phase of life – for the retiree and the firm. Join us for this session to see how!

©NEW!

## Talking Straight to Drive Change

The ability to give – and receive - feedback effectively is one of the characteristics of a great leader. Yet, many of us struggle with these crucial conversations, despite the benefits to ourselves and our team. In this session, we will explore different methods of talking straight to drive change – without damaging relationships -- including:

- ⊙ Addressing expectation gaps
- ⊙ Using the keep-stop-start method
- ⊙ Mastering the art of listening
- ⊙ Developing clear action plans

Gain new skills that will give you confidence in holding the crucial, and beneficial, conversations that will help your people and your firm succeed!

©NEW!

## Trust: Developing It, Maintaining It, and Repairing It

People who trust you will engage meaningfully with you, work tirelessly for you, support you, and will speak highly of you, too. Trust is as powerful an element of success as any other and is one of the most important characteristics of an inspired, unified, and difference-making team. And yet, workplace surveys (and our experience) show that employees do not trust their employers, co-workers do not trust their peers, and owners do not trust their partners. Wow! Attend this session to explore the cornerstones of trust in your relationships with others, focusing on those with staff, peers, partners, and clients. Together, we'll learn:

- ⊙ How trust is earned and maintained
- ⊙ Trust-building behaviors including integrity, accountability, and straight talk
- ⊙ What to do when trust erodes or is broken
- ⊙ The fundamentals of forgiveness

Leave this session with insights and actions you can take to enhance the trust you have in your relationships and in your firm.

“The leadership training we received from ConvergenceCoaching has already impacted our firm positively. We were a year into leadership development and the training both energized and organized our effort by providing fundamental techniques that we can consistently apply, enabling us to make great strides toward a culture of ownership and accountability. In addition, the training improved our group communication and conflict management. Our instructor’s energy and ability to maintain a finger on the pulse of our trainees were excellent. We look forward to continuing our relationship.”

**W. Mark Rudolph President & CEO**  
Yount, Hyde & Barbour, PC

ConvergenceCoaching, LLC

# Organization & Human Resources

## Building a Learning Culture in Your Firm

A learning culture can be a major factor in retention and differentiate your firm, too. Developing an appreciation for continuous learning involves more than skills development and technical training investment. In this session, we'll explore steps you can take to build a learning culture in your firm, including:

- ⦿ Creating an environment that embraces continuous formal and informal learning
- ⦿ Understanding the diverse learning styles, interests, and motivators of your team
- ⦿ Developing a systemized approach to providing your people with the skills, soft business process acumen, and technical expertise they need

Leave this session with new ideas and tools to invest in the right learning for all team members, at all levels, at the right time in their careers.

⦿ **NEW!**

## Capitalizing on Social Media as a Strategic Communications Tool

With over 300 million people using Facebook and over 60 million on LinkedIn, it's safe to say that social media technologies have become mainstream in both our personal and professional lives. Most firms struggle to ensure that these technologies are contributing positively to productivity – not detracting from it. That's when HR is called in – to help regulate employee use. But before you can develop a policy that's going to meet your firm's needs and culture, you have to first understand (or help develop) your firm's strategy for deploying these powerful technologies to build your brand, attract employees, develop new business, and gather market intelligence. In this session, we will explore how you can help your firm:

- ⦿ Navigate and prioritize options for the strategic deployment of social media
- ⦿ Develop a social media policy to support your firm's strategies
- ⦿ Conduct education to inform your employees and compel them to use the technologies in the way you've intended

## Defining Your Organizational Roles and Responsibilities

Defining the roles and responsibilities of your people (and the principals) in your firm will help you be more productive and profitable and create a more satisfying, motivating team environment. Attend this session to learn:

- ⊙ Methods for easily developing role definitions for your team
- ⊙ Key components required to ensure that everyone is clear on their role, responsibilities, and measures for success
- ⊙ How these role definitions will enable you to recruit the right people the first time and retain them a long time
- ⊙ Different functional areas of your practice to consider when creating role definitions so there are no tasks without owners
- ⊙ Ways to transition responsibilities—usually yours!—from one role to another to make your team more productive and effective

Leave this session with a clear understanding of your organizational roles and responsibilities!

## Developing Your Team for the Future

Building a high-performance team is one of the most important investments you'll make in your firm, and it can be one of the most challenging initiatives you'll undertake as well. Investing the time to develop your team for the future will increase their ability to succeed and improve your firm's performance, too.

In this session, we will explore best practices in team development, including the following concepts:

- ⊙ Defining your team's purpose
- ⊙ Creating a culture of ownership and accountability
- ⊙ Building team relatedness
- ⊙ Effectively motivating your diverse team members

⊙NEW!

## Driving Your Career Success

Dream of success but not quite sure how to get there? This session is designed for the young up-and-coming professional who wants to take more responsibility for the speed and trajectory of your career progression. Attend this session where we will help you develop a strategic plan and identify a clear approach for driving your career forward. Our topics include:

- ⊙ The role of integrity, ownership, effort, and accountability in your success
- ⊙ The importance of effective goal setting
- ⊙ Enrolling others in your progression
- ⊙ Developing your sphere of influence
- ⊙ The importance of failure and flexibility in your growth

Walk away with the motivation to document and then truly implement your personal career plan!

“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 Alliance

## Effective People Development Strategies

Building a team of productive and motivated people is a challenge many firms face. It is important to have effective processes in place to assess your staff's progress in achieving predetermined goals and build on that process to further their careers with your firm. Attend this course to learn how to:

- ⊙ Set performance expectations and establish individual goals
- ⊙ Apply different methods of providing performance feedback
- ⊙ Develop Career RoadMaps and mentoring programs
- ⊙ Use effective performance management and motivational strategies

Leave this session with an action plan to use to help your people and your firm succeed!

⊙ **NEW!**

## Finding Your Voice as an HR Professional in Firm Strategy

All too often, Human Resources is asked to help implement a firm strategy or policy without having input prior to the decisions being made. Or, you find yourself in the middle of strategic or philosophical disconnects between key leaders or departments, attempting to mediate behind closed doors without feeling empowered to truly solve the issues. In this session, we will discuss ways to elevate HR so you are able to actively participate in driving firm strategy, facilitate open and honest conversations, and have a bigger impact on your firm's overall success.

In this session, we will:

- ⊙ Discuss things that cause HR professionals to not be heard as someone who should consistently sit at the partner table
- ⊙ Explore a strategic planning methodology that you can deploy to help uncover disparate viewpoints and unify your team around specific strategies
- ⊙ Identify accountability strategies that can ensure all levels feel responsible to perform on their portions of any plan
- ⊙ Understand methods to minimize triangulation in your role and drive partners or key leaders to communicate more openly with one another

Leave this session with a plan to help enhance your role as strategic advisor and performance driver in your firm.

⊙ **NEW!**

## Helping People Overcome Their Personal Pitfalls

We all have areas for improvement, so why do we avoid talking openly with our partners and team members about them and theirs, too? In this session, we'll explore the reasons that keep us from addressing needed performance improvements and engage in a discussion regarding how to overcome our fears and resignation to gain the confidence and commitment needed to deliver feedback that transforms individual and team performance. We'll discuss:

- ⊙ Barriers that keep us from addressing areas for improvement
- ⊙ Ways to get to the true root cause of performance or behavior
- ⊙ Methods and language to enable us to inspire others
- ⊙ An approach to clarifying ownership and accountability for the resulting improvement plan

Leave this session with the motivation you need to address long-standing performance improvements in your firm!



### Keys to Lasting Career Satisfaction and Success

It can be easy to get caught up in the daily routine and lose sight of the importance of your work and the difference you make for others. To increase your enthusiasm, drive, and interest in your career, it is critical to define where you're headed and identify what challenges and inspires you about your work. In this session, we will focus on ways you can increase satisfaction in your job by exploring:

- ⦿ Ways to minimize draining aspects of your job and find more facets that inspire you
- ⦿ How to capitalize on your strengths, talents, and skills
- ⦿ Your personal and professional goals and a plan for reaching them
- ⦿ Your individual motivators and their role in your career success
- ⦿ Ways to manage your stress level and balance your life

Leave this session with new habits and exercises to help achieve career fulfillment and success!

### Managing Generational Differences in Your Practice

Generation X, Y, and Baby Boomer team members all have unique differences. Because there are different generational experiences, we'll explore the core distinctions between the generations and identify methods for maximizing each of your team members' success. Attend this session to:

- ⦿ Understand the generational concept and explore Baby Boomer, Gen X, and Gen Y differences
- ⦿ Learn methods for motivating your diverse team members
- ⦿ Explore organizational changes that may be required to succeed with a combination of Baby Boomer, Gen X, and Gen Y leaders in your midst

## Motivating and Managing Your People

Your team members want to understand how their work fits into your firm as a whole and to be known by their supervisors as “whole people.” Are you doing all you can to motivate your talented team in ways that are meaningful to them? Attend this session to:

- ⊙ Understand what motivates your team members
- ⊙ Learn specific actions you can take to inspire them
- ⊙ Organize your firm in a way that maximizes the resources you have
- ⊙ Develop a culture of ownership and accountability

Leave this session with tools you can use to develop an organization filled with motivated, accountable, and tenured people!

## Recruiting is a Marketing Function!

Finding the right team members at the right time is key to your practice success and the market has never been tougher. That’s why it’s more important than ever to execute a recruiting strategy that applies true marketing concepts to differentiate your firm from the rest. Attend this session and explore the process necessary to attract the best and brightest of the profession and enhance your ability to:

- ⊙ Develop a differentiating recruiting strategy and story
- ⊙ Understand what your competitors are doing and saying in the hiring process
- ⊙ Examine your recruiting process to ensure that it compels candidates to join
- ⊙ Create clear deliverables that enable candidates to picture their future with your firm
- ⊙ Increase your firm’s hiring effectiveness

Leave this session with a practical, effective approach to help you develop your firm’s recruiting marketing plan!

## Recruiting Top Talent to Your Practice

Your team members are the key to your practice success. In this session, we’ll explore the recruiting processes necessary for firms to attract the best and brightest of the profession. Attend and enhance your ability to:

- ⊙ Identify the right time to begin hiring
- ⊙ Create accurate and compelling job specifications for new positions in your firm
- ⊙ Develop a recruitment plan
- ⊙ Source quality candidates
- ⊙ Screen candidates efficiently using the latest techniques, including assessment tests
- ⊙ Hire the right person the first time

“Your training was just what I had been looking for - almost like great personal counseling! Although I have been in this business for 25 years and many of your suggestions were things that I have considered before, I did not know where to start...After the training, I feel ready to apply the information to be a better manager of time, employees, and myself. Thanks again. I could have stayed there indefinitely eating up everything you said!”

**Tomibeth Brooks, Partner**  
**Stewart, Brooks & Bates**

## Understanding and Managing Gender Differences

So, if “men are from Mars and women are from Venus,” how do we manage those differences in the workplace? From an early age, we are taught certain “truths” about male and female behavior that carry through to our adult lives – and this impacts how we perceive and interact with others in a professional setting. In this course, we will:

- ⦿ Explore gender differences and male/female perceptions
- ⦿ Consider communication strategies to mitigate gender-based misunderstandings
- ⦿ Discuss ways to manage and motivate your people in light of gender differences
- ⦿ Discuss strategies to educate your staff and narrow the gender gap in your firm

Leave this session with a better understanding of gender-based differences and methods to integrate all of the talented team members in your firm!

## Understanding Diverse Personalities

Have you ever wondered why you act (or react) the way you do or why others act (or react) differently than you do? Many contributing factors affect our unique approach to life, work, and relationships, but one of the most powerful factors is our inherent personality. Understanding your personality and how it relates to others will enable you to build empathy in your teams and develop communications and processes that best fit the unique differences that exist. Attend this session to learn:

- ⦿ How identifying your personality traits – and those of your team members – can enhance your team
- ⦿ Common assessment tools to help you identify your personality type
- ⦿ A deeper understanding of one personality assessment tool, the Myers-Briggs Type Indicator or DISC, and how you can use it to enhance your personal effectiveness and that of your team

Leave this session with a better understanding of personality differences and the motivation to embrace your unique personality and the diversity of your team!

## What Are Your Organizational Ethics?

In today’s workplace, understanding your organizational ethics and how to apply them is a must. Defining, understanding, and communicating your organizational ethics is critical to ensuring that your people make the right decisions, take the right actions, and operate with the values and behaviors that are important to you and, in some cases, required by law. Attend this session to explore the process of creating and communicating an organizational code of ethics including:

- ⦿ Understanding the differences between a code of ethics and a code of conduct
- ⦿ Exploring your organizational ethics
- ⦿ Evaluating the external drivers that can affect your ethics, including legislation and compliance
- ⦿ Identifying the steps to defining and communicating your organization’s ethics

Leave this session with the information you need to raise your organizational consciousness to a higher level!

ConvergenceCoaching, LLC

# Sales & Marketing

## Capitalizing on Public Relations to Build Your Brand

Public relations is a broad topic, and it's often confused with golf sponsorships and press releases. In this session we'll explore one of the most powerful aspects of public relations, or PR, and that is the power of the press. We'll cover:

- ⦿ Developing deep and lasting press relationships
- ⦿ Using article writing as a means to establish credibility and build your brand
- ⦿ Knowing when and how to issue press releases so they get attention
- ⦿ Identifying key sources for building your public relations contacts

Leave this session with ideas you can use to build a successful public relations component to your firm's marketing strategy!

## Client Retention and Cross Selling: Mining Gold in Your Own Backyard

Finding new ways to add value for your clients and help them solve problems to achieve their goals is especially critical in today's current economic climate. Meeting with clients, or mining your existing client base, to understand their needs and uncover how you can address them is essential for the continued success for your firm. In this session, you will learn successful existing client marketing strategies and how you can:

- ⦿ Explore methods to deepen your client relationships and uncover new service opportunities
- ⦿ Create a consistent cross-selling strategy to address your clients' needs
- ⦿ Implement marketing techniques and activities to ensure client retention
- ⦿ Explore methods for tracking your client prospect opportunities to increase your effectiveness

Leave this session with practical, effective client communications and marketing ideas you can implement in your organization to realize immediate results!

## Creating a Differentiating Brand Identity

Why would a client want to do business with you? What difference do you make in your clients' lives? What differentiates you from your competitors? Before developing lead generation activities to fill your pipeline, take a step back to develop your "story," or in marketing terms, define your brand identity in a way that will entice potential prospects to buy from you.

We'll take you through the steps to create your unique differentiators and brand identity, including:

- ⊙ Defining what sets you apart from other firms
- ⊙ Defining the mission, vision, and the values to which your firm is committed
- ⊙ Defining what sets you apart from the competition
- ⊙ Outlining your "story" - who you are and how you fulfill on your mission and vision

Learn how, when, and where to communicate your unique value and key differentiators.

## Delivering Exceptional Client Service

In a professional services firm, our people make or break the quality our clients perceive. Still, we seem to take for granted that everyone knows the foundational elements of exceptional client service and may not spend enough time training or communicating on this critical subject. Attend this session to explore the most important elements of exceptional client service including:

- ⊙ Ensuring that you and your team have a client-centered mindset
- ⊙ Methods for building rapport and trust
- ⊙ Developing a problem-solving culture and toolset
- ⊙ Developing a consistent project management approach
- ⊙ Follow through and internal communication techniques
- ⊙ Tips and ideas to enhance your firm's client service quickly

Leave this session with a more thorough understanding of the "art" of client service and enhance your firm's ability to make your clients feel valued.

"ConvergenceCoaching delivered leadership training for our firm that transcended levels – teaching practical behavioral concepts to our staff, administrators, managers, and partners. The material provided a common understanding of crucial concepts such as ownership and accountability so that we speak the same language as a team. We also gained concrete ideas for enhancing our people and project management. We are excited to be planning another training event with them for the near future!"

Linda Steele, *Director of Education*  
Habif, Arogeti & Wynne, LLP



## Developing a Successful Strategic Initiative or Niche

Starting a new internal project. Taking on a new product line. Creating a new department or division. Each of these is an example of a strategic initiative in your organization. Unfortunately, we don't always approach new initiatives with a sound strategy and, as a result, they don't always return on our investment. Attend this session to ensure that you have done your homework before you launch a new initiative to maximize your success. We'll explore:

- ⦿ How to decide that a new initiative makes sense from a timing and resource perspective
- ⦿ Methods to structure the initiative to ensure success
- ⦿ A checklist to help you as you undertake a new initiative
- ⦿ Initiative issues including de-emphasizing and eliminating under-resourced or unsuccessful initiatives

## Developing Winning Proposals

You're ready to propose your firm's solution, and you want to be sure that it is the one selected. Writing your proposals so that your prospect or client feels that you understand their challenges – and how to help solve them – is key to increasing your potential of winning the engagement. In this session, we'll explore how to create winning proposals every time, including:

- ⦿ Determining where your proposals fit into the sales process and who should be involved in their preparation and delivery
- ⦿ Exploring the types and components of proposals
- ⦿ Writing techniques to "hook" your prospects
- ⦿ Delivering winning proposals by structuring effective meetings and presentations
- ⦿ Creating a systematic, repeatable proposal process for your team that ensures consistency

Leave this session with ideas that you can immediately apply to increase your firm's engagement success!

## Developing Your Firm's Marketing Function

Do you wonder when you should add a marketing professional to your team? And, when you do, what their key responsibilities and compensation should be? In this session, we'll explore the different marketing roles within professional services firms and when you should consider adding marketing professionals or expanding your current marketing group, including what the objectives and roles of your marketing professionals should be. And, we'll explore best practices for developing the marketing function within your practice.

Leave this session with some practical ideas that you can easily implement no matter what size your marketing function is!

## Developing Your Firm's Marketing Plan

Developing your firm's marketing plan will help you focus on your firm's strengths and market opportunities, create accountability and ownership around your marketing efforts, and also measure the cost and success of each initiative. Best of all, it doesn't have to be complicated! In this session, you will learn methods for developing your marketing plan including:

- ⊙ Uncovering who should be involved in marketing planning inside your firm
  - ⊙ Creating your marketing strategy
  - ⊙ Elements of a marketing plan and what it should address
  - ⊙ Marketing planning tools available
- Establishing a structure of accountability to accomplish your marketing goals

Leave this session with a practical, effective approach to develop your firm's marketing plan!

⊙ **NEW!**

## Effective Business Writing for Busy Professionals

Writing well is considered an important hallmark of successful professionals. The ability to inform and inspire in writing can enable you to influence decision makers, lead others, impress clients, and earn profits for your firm – all while enhancing your career and your reputation. In this course, you will learn how to write effective reports, business letters, e-mail messages, memos, and online posts. We will explore the following topics:

- ⊙ Composing effective written communications that gets results
- ⊙ Writing clearly, concisely, and persuasively in all forms of communication
- ⊙ Choosing the best form of communication to make the most impact
- ⊙ Proofreading for common spelling and grammar errors

Attend this training and gain the confidence to make a difference for others with your written word.

## Embracing Social Media in Your Firm

Social media, the use of online technologies to connect with people, is revolutionizing the way we communicate with others. Most of us have explored at least one of these technologies, or have at least heard of those using them to build their networks, generate business, and build brand. Attend this session for an in-depth discussion of the real-life applications of LinkedIn, Facebook, and Twitter for networking, marketing, and recruiting, including:

- ⊙ Using the power of LinkedIn to expand your knowledge of prospects and clients and using connections to find a “warm way in” to target companies
- ⊙ Building relatedness by sharing your firm’s culture and staying in touch with people across borders and over time with Facebook
- ⊙ Promoting what you’re up to and branding your firm with Twitter
- ⊙ Integrating these technologies to save you time so you can take full advantage of all that they have to offer!

Leave this session with at least one idea to help you benefit from the social media revolution!

## Enhancing Client Service through Surveys

If asked, most of us would say that we’re committed to 100% client referenceability and client relationships that last a lifetime. Yet few of us really know how we’re doing or what else we should do to help our clients be more successful. Attend this session to learn best practices for client surveying techniques, including measuring your levels of client satisfaction, keeping client information current, and identifying opportunities within your client base.

Return to your office with at least one idea that you can implement to measure and enhance the value you’re providing your clients!

## DL Enhancing Your Networking and Social Media Skills

Networking is the “art” of meeting with others to build rapport, develop relationships, and ultimately gain business for your firm. Your professional success depends on your ability to network with the people in your community and in your industry. Networking is also a must-do activity for those committed to advance in their careers. The best leaders and business developers know how to connect with people and maintain client, prospect, vendor, and referral relationships. In this course, we will explore ways to help you develop your personal networking plan and maximize your networking efforts, including:

- ⊙ Gaining an understanding of how networking can make a difference for you
- ⊙ Identifying the principles of networking and also some important do’s and don’ts
- ⊙ Looking at various avenues for networking – both “old school” and high-tech, including social networking
- ⊙ Understanding methods for referral tracking and acknowledgment

Leave this session with the information you need to enhance the success of your networking activities!

NEW!

## Enhancing Your Sales Success

Your firm will close more business faster when you have a defined sales process and build your team's business acumen. In this session you will learn to implement a consistent sales approach and process your team can follow, including:

- ⊙ Implementing a sales pipeline process to track all opportunities for your firm
- ⊙ Ensuring each team member has a personal marketing plan to identify new sales opportunities for your firm
- ⊙ Providing business development and sales training for your team members to ensure consistency in the identification, qualification, and closing of opportunities

Leave this session with proven techniques to enhance the long-term sales success of your team and your firm!

NEW!

## Four Secrets for Developing a Powerful Sphere of Influence

This session is a must for accounting professionals who want a no-nonsense, focused approach to enhancing your ability to develop your network of contacts and better serve your clients and employer as a result. In this session, you'll gain insight to the four "must-do" activities that, when done regularly, will help you build your sphere of influence. We will explore:

- ⊙ Old school and online networking activities to build your network of contacts and personal brand
- ⊙ Asking the right questions to build rapport and uncover opportunities and connections
- ⊙ Conducting referral meetings to build relationships from your networking activities
- ⊙ Tracking your activities to be accountable and be able to report on your success

Leave this session with the confidence and an action plan to turbo charge your business development activities!

## Growing Your Practice through Referral Source Marketing

When you develop referral sources that complement your services, you'll be in a stronger position to respond to your clients' requests, even when their needs are outside your realm of expertise. In this session, you'll gain practical tips and strategies you can apply immediately to develop and maximize the success of your referral sources including:

- ⊙ Identifying, attracting, and qualifying referral relationships
- ⊙ Methods for ensuring success in your ongoing referral relationships
- ⊙ Tracking the success of your referral source marketing activities

Leave this session with enough information to enhance the quality and success of your referral relationships!



“ConvergenceCoaching offers a myriad of topics that apply to a broad cross-section of CPAs, from large firms to sole practitioners as well as our CPAs in industry. We can count on them for entertaining and informative general sessions, breakout sessions, and all-day workshops every time.”

Lynne Carr *Conference Manager*  
Georgia Society of CPAs

## How to Sell Your Ideas, Services, or Solutions

Attend this course and learn the basics of packaging and positioning your ideas so that they are heard, understood, and then accepted by your chosen audience. In this interactive session, we'll explore the emotions that drive us to accept or reject ideas and methods you can use to articulate your idea, your solution, or your service in a way that appeals to your audience's motivators.

Leave with practical tips you can put to work immediately including:

- ⦿ Understanding that gaining buy-in to your ideas is selling
- ⦿ Knowing your audience
- ⦿ Understanding the problem, need, or issue you're trying to solve
- ⦿ Identifying solution alternatives
- ⦿ Presenting your solution and gaining commitment

## Must Do Busy Season Marketing Activities

Often marketing and business development activities get put on hold during busy season instead of using this prime client time as an opportunity to enhance your service to existing clients and generate new business for your firm. Explore how to leverage your busy season by committing to three critical marketing activities, including:

- ⦿ Conducting a simple client survey while meeting with clients to learn about their objectives and uncover new service opportunities
- ⦿ Participating in networking activities even when you feel too busy to do so
- ⦿ Meeting with referral sources and learning about their current needs and those of their clients – ensuring that your referral sources don't perceive that you're too busy for a referral!

Attend this session with a renewed commitment to your marketing and business development activities to ensure a steady flow of work after busy season ends!

## Packaging Your Small Business Services

Effectively packaging your firm's services and promoting them to new and existing clients is a crucial step to growing your small business services. Attend this course to learn:

- ⦿ The five P's of marketing and where packaging fits in the mix
- ⦿ Client service packaging options
- ⦿ Steps you can take to develop and price your packaged services
- ⦿ How to effectively communicate your packaged services in your market

Leave this session with a small business services action plan you can put into practice immediately!

## Secrets to Niche Practice Success

Once you've committed to take on a strategic initiative and develop a niche, you'll then need to apply strategic insight and then strong tactical execution to make it a success. In this session, we'll discuss the keys to developing and then growing a niche practice in either the accounting or consulting arena and cover these "big picture" niche concepts:

- ⦿ Identifying your niche practice value proposition
- ⦿ Applying important niche leadership behaviors
- ⦿ Developing marketing and cross-selling strategies to ensure your niche success
- ⦿ Breaking down internal barriers to niche success

"This was a highly motivating session! Our trainer made the topic of marketing and sales achievable by breaking down the process, addressing fears and common questions, and showing the benefits of making business development a priority."

**Amelia Blessing, Senior Accountant**  
Machen, McChesney & Chastain, LLP

## Strategic Selling: Closing the RIGHT Business

Whether you have a pipeline full of opportunities or need to generate more prospective clients, you want to be sure you and your team are focused on closing the ideal (or close to ideal) target clients instead of opportunistically closing engagements that use resources but aren't best for the firm. To be more strategic in your business development efforts, attend this session and learn:

- ⦿ How to identify your ideal target client – or sweet spot – for each of your firm's service lines and initiatives
- ⦿ Methods for tracking and prioritizing your prospects so you can focus on the most strategic opportunities
- ⦿ Qualification techniques to use when you identify and target new clients
- ⦿ Closing approaches that will help you win engagements

Leave this session with a strategic approach to uncovering the best clients for your firm!

## Successful Lead Generation Strategies

Attend this session to learn what's working, and what's not, in corporate lead generation today. We'll explore a number of important lead generation program planning techniques and identify the critical success factors to making any lead generation investment pay dividends. Learn about the lead generation activities that produce results, including:

- ⦿ Roundtables and "stealth" and web seminars
- ⦿ Teleprospecting
- ⦿ Direct mail, including e-mail and fax

Leave this session with proven lead generation strategies that will generate new name business for your firm!

## Successfully Managing Your Sales Process

Attend this course to learn the strategies and techniques for successfully managing your sales process, including effectively monitoring your sales pipeline and organizing to sell effectively. This course will provide the information you need to:

- ⦿ Develop and implement effective sales processes
- ⦿ Manage and maintain a sales pipeline
- ⦿ Consistently and effectively hold sales management meetings with your sales team
- ⦿ Organize your team so that sales roles and responsibilities are clearly understood
- ⦿ Ultimately close more business



## Telling Your Firm's Story

How do you tell your firm story in a compelling and differentiating manner? Does your story articulate your unique strengths and the difference you make in the lives of your clients, staff, and community? In this course, we will explore how to identify your firm's unique story and differentiators and how to communicate them through traditional marketing tools as well as verbally, including:

- ⦿ Developing your firm's positioning and competitive differentiators, including distinguishing between features and benefits
- ⦿ Writing your story and incorporating it throughout all your marketing and sales tools
- ⦿ Communicating your story by developing an elevator pitch and supporting talking points to use at networking events, referral or alliance meetings, and prospect meetings

Leave this session with a clear direction to develop and tell your firm's story!

## When New Deals Aren't Closing: Strategies for Problem Solving

Do you seem to have a steady stream of client opportunities but they're just not closing? Attend this session to explore strategies for increasing your close ratio and turning your prospect opportunities into closed engagements. We'll explore:

- ⦿ How to assess your pipeline activity to gain a true picture of your current state
- ⦿ Evaluating your sales methods to ensure you are focused on the right opportunities at the right time
- ⦿ A process for measuring the status of each opportunity and next steps to keep them progressing
- ⦿ Best practices for communicating your value to prospects
- ⦿ Ways to use your pipeline as a leading indicator for planning

Leave this session with at least one strategy that you can implement to improve your ability to add new clients to your firm's client roster!

Convergence Coaching, LLC

## Workshops

Most CPA firms don't have the time or the resources to invest in formalized partner and staff development. Instead, they rely on "on-the-job" learning to discover the talent within their ranks – then spend years slowly indoctrinating their people to leadership "ways of being."

In these impactful workshops, we help emerging leaders develop the skills they need to succeed as they progress in their role in the firm. In addition, we help all team members in your firm, including managing partners, niche leaders, new partners, partner candidates, firm administrators, and marketing, sales, and human resources professionals, develop the self-awareness, focus, leadership, revenue generation, and group management skills needed to achieve success.

Most of our workshops are designed to be one-day workshops and can be conducted individually or combined for a multiple day event. Attendees will participate in group discussion and a number of exercises designed to reinforce learning. Each participant will receive a valuable course manual that includes course materials, exercises, tools, and resources to leverage for self-study or reference when returning to the office.

If you're interested in an effective method for maturing and developing your leadership, succession planning, business development, or human resource management skills (or those of others in your firm) to their full potential, these workshops are a must! Look for the Emerging Leader "EL" icon beside courses that firms have found particularly important in developing their up-and-coming leaders.

"I got more out of the first two hours of this course than any other full day course I've attended. The material addressed the exact issues I'm dealing with in my firm, and I left with practical tools and ideas that I could go back and implement."

Jeff Kuchenbecker *Partner*  
Meicher & Associates, LLP

## Leadership

NEW!

### Coming Together – The Art of Merging

Whether you're bringing in a new partner from the outside, purchasing a niche specialty practice, or merging with another firm, navigating the nuances to ensure success can be tricky. In this session, we'll remove the mystique of what it takes to bring two entities together so that you can enjoy the synergies of a larger, stronger practice. We will discuss best practices including:

- ⊙ Identifying the due diligence that HAS to be done – and not just the financial aspects – to be sure you're a fit or identify red flags to address before moving to the next phase
- ⊙ Establishing a means for valuing the practice that will work today and in the future
- ⊙ Updating your partner agreement and your buy-sell agreement to ensure it addresses the critical components to minimize conflict in the future
- ⊙ Developing a communications plans to share your strategies with your team, clients, and others in the right timing
- ⊙ Integrating your partners, teams, and clients so they think and act as one

Leave this session with a clear action plan of the steps you need to take to set you and your team up for a successful merger!

EL

### Delivering Compelling Presentations *1-day workshop*

Presenting your ideas with power and persuasion is a critical leadership skill and is both an art and a science. In this one-day workshop, you'll discover the nuances of developing and delivering powerful presentations tailored for your audience, including:

- ⊙ Exploring the natural inhibitors we experience when speaking to groups of people
- ⊙ Learning how to research, organize, and develop effective presentations
- ⊙ Understanding important presentation and facilitation techniques to keep your audience engaged
- ⊙ Practicing your skills to become a more powerful presenter

Leave this session with the confidence to develop and deliver effective presentations to ensure that your message is heard!

EL

### Developing a Culture of Leadership and Accountability *1-day workshop*

This workshop is designed to enhance the self-awareness, focus, leadership, and group management skills that your current and up-and-coming leaders need to achieve success. When your firm's partners, managers, or other firm leaders attend this event, they will learn tangible methods to enhance their leadership and accountability skills. We will discuss:

- ⊙ Leadership fundamentals and attributes of effective leaders
- ⊙ Creating a culture of accountability and ownership to effectively organize a team of leaders
- ⊙ Managing difficult conversations by studying conflict styles and using a conflict management methodology to collaborate win-win solutions

Attend this workshop to gain the methods you need to improve your leadership ability and create a culture of accountability throughout your organization.



## Leadership Fundamentals, Communication, and Meeting Facilitation Skills *2-day workshop*

Participants will learn methods to enhance their leadership skills, including:

- ⊙ Leadership fundamentals and attributes of effective leaders
- ⊙ Learning a methodology to plan for success now and on an ongoing basis
- ⊙ Creating a culture of accountability and organizing a team of leaders
- ⊙ Developing a tactical plan
- ⊙ Common practice communications and how to improve them
- ⊙ Meeting facilitation ideas to help run effective meetings
- ⊙ Managing difficult conversations by studying conflict styles and a conflict management methodology

## Staff and Administration Development: Personal Productivity and Professionalism *2-day workshop*

Attend this workshop to maximize your effectiveness, professionalism, and inspiration. In this session, we'll explore time and stress management techniques, identify the hallmarks of a true professional, and discover methods for more effective communication. These will all help you build a foundation for ongoing career success and satisfaction. When you attend, you'll learn:

- ⊙ Factors that can lead to stress in your personal and professional life and ideas to help mitigate them
- ⊙ How to create your optimal work style and work environment and ways to minimize distractions in the workplace
- ⊙ Methods for prioritizing the things on your to-do list so that you can accomplish more in less time
- ⊙ Techniques for getting and staying focused until your tasks are complete
- ⊙ Techniques to achieve success including:
  - Goal setting
  - Affirmations
  - Visualization
  - Centering or meditation
- ⊙ How to convey confidence through a professional appearance and image
- ⊙ Methods to develop a code of personal conduct or behavior that demonstrates respect for your organization, co-workers, clients, prospects, and others
- ⊙ Today's manners and etiquette for various business situations
- ⊙ How to build confidence in making the right choices when ethical issues arise in your business environment
- ⊙ Common practice communications and ways to enhance them

Leave this session with strategies you can implement to increase your confidence, get more done in less time, and enhance your credibility!



## Succession Planning Workshop *1-day workshop*

Whether you or someone in your firm is nearing retirement age, being promoted, considering a sabbatical, or just concerned about the fact that you're carrying too much responsibility for your firm, then this session on succession planning will help ease your mind. Attend this session to learn:

- ⊙ The psychology of letting go and how to support the retiree in transitioning
- ⊙ Who you'll have to "be" to lead a succession planning effort
- ⊙ How to organize to your team to ensure a successful transition of duties
- ⊙ How to begin developing ownership and leadership in your practice
- ⊙ Methods to market and message your succession plan
- ⊙ How to manage client expectations throughout your transition
- ⊙ Ideas for navigating the financial and contractual issues



## Women as Powerful Leaders and Communicators *1-day workshop*

This session will help you gain power and confidence in your role as a leader, mentor, and manager. Together, we'll explore the unique elements that cause you to behave, communicate, and react the way that you do when working with others. We'll focus on the things that make you unique and discuss strategies to enable you to be a more cohesive and collaborative leader, including:

- ⊙ Gender differences and ways to bring out the best in both genders and avoid stereotypical traps
- ⊙ Personality differences, beginning with an understanding of your own personality preferences using the Myers-Briggs Type Indicator or DISC Assessment
- ⊙ Communication strategies designed to motivate, navigate difficult conversations, and compel others to follow your lead

Attend this workshop and learn how to capitalize on your unique gifts, minimize inhibitors, and be a more inspiring leader and communicator!

**"ConvergenceCoaching delivered many practical applications that I can use to proactively and effectively engage people, which is one of the most important aspects of my work. I gained clarity on how I can produce results, manage commitments and contribute to achieving the goals of our firm from the distinctions I learned. First and foremost, I am more accountable to myself and my team for completing the task at hand. These distinctions ultimately benefit our entire firm."**

**Mark Pineda** *Senior Audit Manager*  
Odenberg, Ullakko, Muranishi & Co. LLP

## Organization and Human Resources

### EL Managing Diverse Work Teams *2-day workshop*

In this two-day workshop, we'll begin by exploring some of the differences that make your team unique and how you can best utilize these differences while effectively managing the conflicts and difficulties that are sure to arise. You will learn:

- ⊙ Generational differences – and similarities - and how people of different ages, raised in different eras, are often motivated differently
- ⊙ Gender differences and ways to bring out the best in both genders and avoid stereotypical traps
- ⊙ Personality differences, beginning with an understanding of your own personality preferences using the Myers-Briggs Type Indicator or DISC
- ⊙ How to motivate and leverage the talents of your diverse team

### EL Recruiting, Retaining, and Motivating the Best and the Brightest *1-day workshop*

Your team members are the key to your success. In this workshop, participants will learn best practices in human resources, including:

- ⊙ Innovative recruiting concepts and how to differentiate your firm from others in the hiring process
- ⊙ Sources for finding qualified team members and partners
- ⊙ Creating mechanisms for your people to succeed, including:
  - A clear organization, roles definition, and reporting structure
- ⊙ Methods for developing an organization filled with accountable, fulfilled, and tenured people
- ⊙ Understanding what motivates your staff and learning specific actions you can take to inspire them

### Recruiting, Retaining, and Performance Management – an Advanced Study *1-day workshop*

Your team structure is the key to your firm's success. In this workshop, intended for firm administrators, HR managers, and partners responsible for HR, we'll take recruiting and retention topics to a deeper level and share best practices in attracting the right people (and weeding out the wrong ones!) to maximize the performance of your firm's existing team members. Topics to be discussed include:

- ⊙ Recruiting positioning methods to attract the right people to your firm
- ⊙ Screening techniques to identify under-doers, high-maintenance, and other unqualified candidates
- ⊙ Orientation methods to familiarize new employees and bring them up-to-speed quickly, including:
  - New employee orientation processes
  - Buddy programs
  - Mentoring programs
  - Training approaches
- ⊙ Performance management must-haves to set expectations, spur motivation, and manage disappointments in employee performance

This action-packed day will combine lecture, group discussion and brainstorming, and exercises to ensure eye-opening insights that you can apply to enhance your firm's recruiting and retention programs immediately.



NEW!



## Successful Business Development and People Management Strategies

### *1 or 2-day workshop*

This workshop is a must for partners, managers, and other practice leaders who want a no-nonsense, focused approach to enhancing your marketing and business development efforts and the tools to manage your team better.

In the first half of the workshop, you'll gain insight into the "must do" personal marketing activities that, when done regularly, will help you maximize the success of your personal and organizational marketing efforts. We will discuss:

- ⊙ Professional networking, including new online social networking, to build your firm's – and your personal – brand
- ⊙ Building referral relationships from your networking activities
- ⊙ Tracking your activities in a sales pipeline that will result in more successes

Your team members are the key to your success. Even though we have had to rebuild our practice development efforts, we must also remain committed to building and retaining our base of talent. With economic recovery and the retirement looming for many, developing and keeping great people will rebound as one of our most significant challenges. During the second half of this workshop, participants will learn best practices in people management, including:

- ⊙ Understanding what motivates your staff and learning specific actions you can take to inspire them
- ⊙ Creating mechanisms for your people to succeed, including:
  - A clear organization, roles definition, and reporting structure
  - Set performance expectations and establish individual goals
  - Apply different methods of providing performance feedback

Leave this session with an actionable plan to focus your business development activities and eye-opening insights that will enhance your ability to motivate and retain your people!

## Sales and Marketing

### **EL** Business Development Workshop *1/2-day OR 1-day workshop*

This workshop was created especially for emerging and current leaders to enhance their marketing and business development skills. Managing partners and partners, executives, owners, managers, and marketing professionals will develop the leadership, revenue generation, and positioning skills needed to enhance or achieve success in the areas of marketing and selling. Attend to learn how to guide your team in:

- ⊙ Best position your firm and its brand and differentiate yourself from others
- ⊙ Plan and execute brand and lead generation activities
- ⊙ Develop a personal marketing plan
- ⊙ Implement a consistent sales process with tools to support your team that will enable you to level out your revenue stream and develop internal accountability mechanisms
- ⊙ Put all of these ideas together to develop more opportunity for your practice

### **Deepening Your Client Relationships to Enhance Your Value** *1-day workshop*

If asked, most of us would say that we're committed to 100% client referenceability and client relationships that last a lifetime. Yet few of us really measure how we're doing in this area or what else we can do to better serve our clients. When you attend this session, you will learn how to maximize the value of your client relationships, beginning with your first meeting with a prospect during the sales process, and identify methods to:

- ⊙ Build rapport with prospects and clients by:
  - Asking the right questions
  - Applying real listening techniques
  - Uncovering common goals or elements that develop relatedness
  - Discovering your client's goals, values, and work-style
- ⊙ Learn about your client's business by understanding their industry and the unique challenges, cycles, and other impacts on their success
- ⊙ Become indispensable to your clients by being a trusted advisor – or coach – rather than just a “reporter” of historical information or deliverer of goods
- ⊙ Put processes in place to proactively understand what issues or challenges your client is facing and how you can help, including:
  - Client surveys
  - Meeting with your clients
  - Client management systems or databases
  - Cross-selling processes
- ⊙ Identify communications mechanisms that would enhance your client relationship
- ⊙ Develop internal communications strategies to keep others in your firm informed and current on your clients

Leave this session empowered to deepen – and secure – your client relationships while helping them achieve their goals!



## Delivering Exceptional Client Service *1-day workshop*

In a professional services firm, our people make or break the quality our clients perceive. Still, we seem to take for granted that everyone knows and consistently applies the foundational elements of exceptional client service. As a result, we may not spend enough time training or communicating on this critical subject to explore the most important elements of exceptional client service. In this session, we will explore critical elements of client service and project management concepts, including:

- ⊙ Understanding and confirming the needs of your client
- ⊙ Managing your clients expectations effectively, including:
  - Scoping services and developing a budget to address those needs
  - Identifying milestones and managing progress against them using effective meeting and communication strategies
  - Managing budget against the original scope and milestones, including billing and relieving WIP
  - Managing and communicating scope changes when needed
  - Learning how to say no, or propose alternatives to what the client seems to be asking
- ⊙ Maintaining a high level of internal team communication so that all of your service providers are unified in the approach to service for each client
- ⊙ Managing client upsets and disappointments when they occur
- ⊙ Taking responsibility and learning from service failures
- ⊙ Learning how to ask for constructive feedback and take it, too

Leave this session with a more thorough understanding of the “art” of client service to genuinely differentiate your firm in the way you serve your clients and deliver value!



## Developing Niche Opportunities *1-day workshop*

Every CPA or consulting firm that starts or acquires a niche practice does so with optimism and the intent to better serve their clients and increase firm profits. So why doesn't it always work out that way? Committing to develop a niche and then doing so are significant undertakings that require strategic insight and then strong tactical execution. In this workshop, we'll provide real-world solutions to the toughest challenges and traditional constraints you'll find when starting and managing a niche consulting practice. We'll begin by discussing how to determine which niche practices you should invest in to leverage the real opportunities available from your niche.

In this 1-day workshop, we'll provide you with tools and know-how to enable you to:

- ⊙ Identify your niche practice value proposition
- ⊙ Objectively evaluate the strengths and weaknesses of your niche
- ⊙ Select your niches to maximize success
- ⊙ Apply important niche leadership behaviors
- ⊙ Staff and resource your niches
- ⊙ Develop marketing and cross-selling strategies to ensure your niche success
- ⊙ Develop synergies between your core services group and niche practice areas to allow you to establish a new strategic selling process

NEW!



## Developing Your Sphere of Influence *1-day workshop*

We all have the ability to promote the firm and its services in our various communities, and we can do so without “hard selling.” In this fun, one-day session, we’ll explore a no-nonsense, focused approach to enhancing your personal marketing and business development abilities. Using a combination of instruction, exercises, and group work, we’ll discuss four “must-do” activities that, when done regularly, will help you further your relationships and increase the success of your firm. When you attend this workshop, you will:

- ⊙ Understand the difference between marketing, relationship development, and selling and the secrets to doing each with confidence
- ⊙ Explore what makes your firm special
- ⊙ Gain confidence in “old school” and social (online) networking activities to build your network of contacts and personal brand and convey your firm’s messages effectively
- ⊙ Learn to ask the right questions to build rapport, deepen your relationships, and uncover opportunities and connections
- ⊙ Develop your ability to conduct referral meetings and build relationships from your networking activities
- ⊙ Learn methods for tracking your activities to be able to measure and report on your success

Leave this session with the confidence and an action plan to further your business development activities while making a difference for others, too!



## Successful Sales Strategies— Fundamentals and Techniques *1/2-day workshop*

This is a half-day workshop for sales leaders and practice managers who are committed to develop a sales culture in your firm. Attend to learn how to guide your team in:

- ⊙ Applying a proven methodology to your sales opportunities
- ⊙ Identifying the right sales roles within your firm and understanding how each can contribute
- ⊙ Implement a consistent sales process with tools to support your team that will enable you to level out your revenue stream and develop internal accountability mechanisms

Leave this session with proven techniques to enhance the long-term sales success of your firm!

*Leadership*

*Organization & Human Resources*

*Sales & Marketing*

*Workshops*

