

Virtual Work Programs Issue 31 | Winter 2014



The holidays are a time to see things in a fresh, new light and consider changes we can make to live our lives more selflessly and make a bigger difference for others. **As we look to 2014, we foresee great change in our profession as a new breed of leaders begins to influence their firms across this country.** It's an exciting time to be an entrepreneur and trusted advisor and each of us has a wonderful opportunity to lead change and drive innovation and value as a result.

One of the game changers on the horizon is the move to virtual work teams and more flexible, less place and time dependent organizations - both within CPA firms and client companies, too. **We feel so strongly about this movement - and your need to lead within it - that we've dedicated this issue of Coaching Concepts to the topic of virtuality.** In [Leadership Lessons](#), we'll explore factors leading to this change and share a story we keep hearing from bright young people that will help us examine our stand on traditional versus virtual work styles. Then, in [Practice Perspectives](#), we'll share eight steps to lead your firm toward virtual work programs and hopefully spark some discussion and commitment within your leadership team to try something in this area in 2014. For some live discussion on the topic, **consider attending our web seminar next week on December 18** where we'll hear insights from fellow CPAs who are pioneering virtual work teams, flexible work programs and virtual client service. Go to www.convergencelearning.com to register for the session.

Please take a moment, too, to catch up on our team members, clients and programs in this issue's [New News](#) and also [click here](#) to view this year's holiday greeting.

As the year draws to a close (where did it go?), **we feel truly grateful and unbelievably blessed to have the privilege of doing work we love, with the support of great friends and colleagues like you and to live and work in a time of such great resource and possibility, too.** We wish you and yours a blessed holiday season and a new year filled with breakthrough performance and plenty of laughter.

Gratefully,

Jen



Leadership Lessons

Virtual Work Teams as a Competitive Advantage: Moving Away from Our Attachment to Time and Place

Increased competition for talent in firms is spawning new and innovative employee engagement strategies. And, at the top of the benefits list for many is increased control over time, or, said another way, the ability for an employee (or partner) to complete their work at a time and place of their choosing when possible. **This demand for anytime, anywhere work is driving CPA firm leaders to give up their attachment to their traditional work values of “face time” and mandated office hours and move to a more flexible, virtual work model.**

Easy internet accessibility, paperless service delivery processes, free video conferencing, real online collaboration tools, portals, the proliferation of powerful mobile devices and other technology innovations make the dream of anytime, anywhere work a reality. And, **technology-wielding, multi-tasking Millennial team members (those born after 1982) want - even expect - their firms to take full advantage of these many wondrous innovations to deliver service in new, time- and place-independent ways.**

For instance, in larger cities with significant commute times, **Millennials tell a story that goes like this:**

- One of the reasons I chose my firm is that its offices are close to my home and commuting is painful where I live
- When I joined, I was assigned to the audit department where we audit for-profit and not-for-profit clients year round
- Nearly every week, I am assigned to an audit team that is expected to meet at a client’s office that can often be a considerable drive from my home. I have to show up when the client opens, which may be 8 a.m., causing me to commute in rush hour which can sometimes take hours
- When I get to the client’s location, I am expected to stay in the conference room and leave the client communications to the in-charge or the partner on the job
- When I audit my sections, I access electronic assets from our portal where the client loaded them weeks prior to the start of the audit
- We then leave when the client’s office hours end, which can - again - be at the peak of rush hour, causing a long commute home

The story ends with a question: “Why, then, do we audit at the clients location when we can easily conduct most of the audit from our offices, home or another locale that won’t put each team member

through a weekly commuting headache?”

There are several potential arguments for this traditional field audit approach that include:

- Some feel that there are benefits to the teamwork that occurs in the small room during field work. *But this same collaboration could happen in a conference room in your office, at a local Starbucks or via Skype, Zoom or Face Time (the mobile app).*
- Some argue that the concentrated focus of being “locked away” together makes the audit most efficient, *but the weekly grind of starting Job B (a new audit) at the beginning of the new week, at a new client – whether Job A (last week’s audit) is finished or not – can easily cause Job A from the prior week to drag on inefficiently. Instead, if clients no longer expect a team to show up at their door on Monday to audit, the team can keep working to finish Job A and then start Job B thereafter. Clients will be less concerned about where or when the work is conducted as long as the jobs are delivered with quality and on schedule.*
- It’s true that clients are used to an audit team showing up as a group and staying for a period of time to get the work done and they may not appreciate this changing. *But younger client decision makers are emerging and their value on face time is less than their predecessors. Some clients would be happy to have their conference or meeting room back and their already-virtual orientation could make the change an easy sell.*
- The need to look people in the eye in interviews and visually inspect for elements of the audit still very much exists. *Is a whole team of people required – many of whom don’t have client contact – to make the drive each day, every day at a rush-hour driving start time?*

This is only one example of the pressure we see on the accounting time and place

paradigm. The increase and rise of working women is placing pressure on firms to figure out how to encourage new mothers (and new fathers!) to experience the joys of parenting and fulfill their parental responsibilities while continuing to contribute meaningfully at work. Often, this entails thinking outside of the box about where and when work is performed.

The ability to serve clients across borders and outside of traditional geographies is causing firm leaders to consider putting “boots on the ground” in distant locales via virtual team members. And, when a valued employee chooses to move from our town, technology offers the opportunity to retain an employment relationship at a distance.

These scenarios, and more, are driving the very real need for firms to give up “old norms” and practice sustaining innovation – truly transforming the way we do things – and allowing for a more practical, valuable and competitive model.

We believe your young people are restless. They question the relevance of some processes and practices and they can visualize how to deliver much of their work differently – often remotely and perhaps at “odd hours” and still be very effective. Try putting some of their ideas to practice. Form a guerilla team with very few traditionalists on it (maybe only one!), have them read this article, our [Practice Perspectives](#) article, and our blog on [abolishing mandatory Saturdays](#), too. Then ask them to develop at least five implementable ideas to begin your firm’s shift away from the “old’ time and place paradigm. Do it today and you’ll be surprised by the enthusiasm, creativity and competitive advantage you unleash!

For more ideas on how to shift the mindset of your firm leaders to move to a more virtual work

environment, contact [Jennifer Wilson](#).



Eight Critical Success Factors to Get Your Firm to Anytime/Anywhere Work

The need for staff continues to heat up as more and more Baby Boomers reach retirement age with too few Gen X'ers ready to replace them. With these labor shortages looming, the need to improve our people programs and allow for appropriate work/life integration is real. In [Leadership Lessons](#), we discussed the forces driving this work style change. In this article, we'll share eight steps to successfully implement virtual – and truly flexible, anytime/anywhere – work programs to differentiate your firm in the recruiting process and continue to be the employer of choice for current team members.

To ensure a successful virtual work program, consider these eight critical success factors:

- 1. Establish trust.** Trust is the cornerstone of any virtual work program and the most important leadership factor in your firm, too. While supporting inexperienced staff remotely can be a challenge and distractions can occur, managers simply have to be better managers in a virtual work environment, and employees must be self-sufficient and focused as well. When managing virtual teams, you have to trust that most of your people will be competent to do the work, motivated by the right things, and committed to make the program, themselves, their clients, and the firm a success. Committing to run the program from a place of trust first will help you set up the rest of the program's constructs. Earning trust is a two-way street, too, and the leadership in your firm must keep commitments, be accessible, provide necessary training and coaching, and ensure technology really works.
- 2. Define expectations.** Define your virtual work program in writing to level set and establish the ground rules for all involved. In your document, consider including facts such as:
 - Why your firm is embarking on the virtual work path
 - Who is eligible to participate – based on tenure, experience, level, discipline, role, performance, circumstances, etc.
 - What the agreed upon ways of conducting business virtually will be and what is not allowed – in this case, the possibilities are almost endless, so you'll have to narrow it down to a few broad categories like out-of-state virtual work programs, work-from-home program options, work-from-elsewhere programs, etc.

- Your communication expectations
- How privacy of client and firm information and data will be protected (we recommend a good intellectual property agreement or elements of this in your firm's overall employment agreement)
- Who pays for specific technologies and supplies
- How success will be measured and on what frequency

3. Communicate transparently. Share the details of your virtual program with the entire team and include it in your HR handbook. Publish who is participating or eligible to participate, including how the program will work, what roles are permitted to work remotely, what is expected of remote employees, and accessibility expectations for the remote worker, their supervisor, and others with whom they interact.

Consider having virtual and non-virtual team members distribute a work-to-do list weekly with any planned out of office time and their commitments for that week to keep everyone in the loop. Establish methods for them to report the status of assignments and report your status on work that impacts them, too. Reset expectations when needed so the affected parties can plan better.

Also, strive to foster a sense of team by touching base and engaging with your virtual team members regularly. Include them in team or client meetings by using teleconference or video conference calls. Be careful not to make derogatory comments about virtual workers or complain about them when they are not present. You may add fuel to the fire on this potentially sensitive topic for some who may view your virtual workers' situation as "privileged."

4. Define, expect, and model ownership behavior and refine ownership expectations regularly. Owners are those who think about, plan for, communicate about, and manage the success of their "thing." To remove all doubt about who's doing what, assign ownership to everything in your firm including:

- Departments, service lines, and initiatives
- Clients or engagements
- People
- Projects and components of projects
- Tasks and assignments

For help on defining ownership for your firm, read Krista Remer's blog, ["I Thought You Were Doing That."](#) This level of ownership definition is critical in virtual work environments so everyone is clear who has the ball and who to go to for questions, issues, or ideas. When projects, tasks, or assignments are assigned to an owner, use good delegation techniques so that both the delegator and new owner are clear about the deliverable or result expected, due date, any information or resources needed, and how and when to report the status or when it's completed.

5. Establish goals. Each team member should have three to five measures of success. Goals need to be specific, measureable, realistic, and relevant. Consider using two different types of goals - those

that improve a behavior or skill (i.e. business development) and those that produce a deliverable or tangible end result (i.e. specific initiative goals). Setting goals will help clarify priorities for the individual, firm leaders, and other team members. Read more about setting goals in the first two blogs of a goal-oriented blog series by Jack Lee [here](#) and [here](#). Check in on the progress of goals regularly to keep everyone working toward the agreed upon commitment. You may have to hold difficult conversations or address a lack of results to maintain the integrity of the program with others who will surely be watching.

6. Compare virtual to on-premise work if possible. Identify ways to measure your virtual team member(s)' performance to their "old way" of operating, if applicable, and to other team members who are in similar positions. There may not be a true apples-to-apples comparison, so if the virtual team members are meeting their agreed upon goals and producing the needed results, then quality of life and employee engagement may be the deciding factors to continue offering a virtual work environment.

7. Utilize technology effectively. The technology available today makes implementing a virtual work environment increasingly doable, but your IT strategy and the technology itself needs to be closely managed to address heightened security risks and other challenges. Consider what you will use or how you will handle:

- Telephone usage (land, cell, or both?)
- Teleconference or video conference options
- Messaging
- Data sharing and access to documents, including version control
- Remote access
- Paperless
- Mobile device support and compatibility
- Security and privacy of data, including client data, especially if work may be done in public venues
- Who will pay for the technology
- Upgrades and access to efficient technology to ensure that they don't negatively impact productivity and accountability

Make sure the performance for your remote systems is equal to, or better than, when using systems in the office to maximize productivity and encourage all team members to put in extra effort remotely when their schedules permit them to do so.

8. Be flexible. Expect to make adjustments to your program as it evolves! Set specific timeframes for evaluation, such as 90 days, six months, and then annually to identify possible improvements and determine the level of success of the program. Involving virtual and non-virtual team members in the evaluation process will ensure well-rounded input.

To ease into a virtual work program, **consider piloting the program to start.** Choose a specific

project, team, or engagement where a virtual program could have the biggest impact or experiment with a seasoned employee who has requested an alternate arrangement or may need to leave the firm due to a relocation or family issue.

Making virtual work an option for your team members will boost morale, allow for better work/life balance, and provide financial and recruiting benefits for your firm, too. Start defining your program today!

For more information about implementing your firm's virtual work program, contact [Tamera Loerzel](#).



Top Thought Leaders, Most Powerful Women, Top 100, and Top 10 for 2013!

Our own co-founder and partner, Jennifer Wilson, was recently honored by *CPA Practice Advisor* as one of the [Top 25 Thought Leaders in 2013](#), and for the second time as one of the [25 Most Powerful Women in Accounting in 2013](#)! Those selected for this distinction were nominated by an individual in the profession and then chosen by a panel of judges. The award is designed to honor women who have a significantly positive influence in the tax and public accounting field.

In addition, Jennifer was recognized as one of *Accounting Today's* 2013 [Top 100 Most Influential People in Accounting](#) for the eleventh time and as one of *INSIDE Public Accounting's* [Top 10 Most Recommended Consultants](#) list for the sixth consecutive year!

We are grateful for the recognition and thank our clients and the award and list sponsors for their support of our mission to drive transformative change and enhance leadership in the profession.

Service Spotlight: Develop Your Firm's Future Leaders with Our Third Annual Transformational Leadership Program

Budget now to make an investment in your team and secure your firm's future. Enroll your **managers and new partners in our Transformational Leadership Program (TLP)**! This in-depth, year-long program **begins June 1, 2014** and is designed to help your future leaders honestly identify their strengths and areas for improvement, develop strategies to drive performance improvements, and prepare them to take on meaningful roles in leading your firm.

For a full year, each TLP participant will engage in:

- **In-depth self-assessments**

- Two in-person, two-day workshops
- Online, self-study and instructor-led web seminars for year-round learning
- Tailored one-on-one coaching sessions for both the participant and their in-firm coach or advisor
- A difference-making project of their choice

The one-year investment to transform your up-and-comers into true firm leaders is **\$4,250 when registered before February 28, 2014** (\$4,750 after 2/28), including the ability to earn over 33 hours of CPE credit.

We are now enrolling the 2014-2015 class! **For more information and to register, visit www.convergencelearning.com**. You can also watch our informative [video](#) on the importance of developing leadership – especially critical to success and sustainability.

ConvergenceCoaching Strategic Partnership Opportunities

Our **Strategic Partnership Program** is designed to align with vendors that we believe will benefit our CPA clients and colleagues and enhance our Strategic Partners' reach into the CPA profession.

Meet our Strategic Partners for 2013-2014:



Avalara (www.avalara.com) pioneered a service-based platform for sales tax and compliance automation and has been recognized for years as one of America's fastest growing technology firms. Their cloud solutions help companies stay focused on their core businesses by providing automated end-to-end compliance services including sales and use tax calculation, exemption certificate management, filing and remittance, and a broad array of related services.



CPAacademy (www.cpaacademy.org) serves as a clearinghouse for free, live online education in the accounting profession. By partnering with CPAacademy.org, presenters reach their intended audience with their marketing messages and gain access to an extensive database and growing membership. Whether you are a thought leader or an emerging leader, CPAacademy.org will support you in developing your marketing strategy, including presenting a webinar, offering an archived event, advertising a seminar, posting a job, or sponsoring the site.

For more information about our strategic partners, visit their websites or click [here](#).

The next enrollment period for our Strategic Partnership Program will officially begin February 1, 2014 and runs through January 31, 2015. If you are interested in becoming a Strategic Partner or have a suggestion for an organization that our clients, colleagues, and friends might find valuable, please **download our flyer [here](#)** or contact Brianna Marth at Brianna@convergencecoaching.com or 402.639.4132.

Further your visibility with CPA firm leadership and decision-makers by securing your position as a ConvergenceCoaching Strategic Partner!

Client Corner

Prestigious 2013 MP Elite

Congratulations to Tom Bonadio of The Bonadio Group and the other managing partners named to [Accounting Today's 2013 MP Elite](#) list, which honors 10 outstanding accounting firm leaders.

Accounting Today Best Firms to Work For

We truly admire our clients that were honored as one of [Accounting Today's 2013 Best Accounting Firms to Work For](#) based on a two-part survey evaluating workplace policies and practices and anonymous employee feedback: **Barfield, Murphy, Shank & Smith, Berkowitz Pollack Brant, Ennis, Pellum & Associates CPAs, Hartman Leito & Bolt LLP, Smith Leonard, Williams Benator & Libby, and The Bonadio Group.**

Accounting Today Top 100 VARs

Congratulations to **Arxis Technology Inc.** who was named to the [Accounting Today's 2013 Top 100 VAR](#) list! Congratulations to your entire team!

AICPA's Center for Plain English Accounting

We're excited about the AICPA's creation of the Center for Plain English Accounting (CPEA). The CPEA is designed exclusively for PCPS small and mid-size member firms to provide A&A support by offering educational webinars, written A&A reports, and providing written responses to technical inquiries. While the technical hotline will still be available, this online resource will provide solutions for "plain English" answers to technical questions and help in applying standards when preparing financial statements and documents. Check out www.aicpa.org/cpea for more information!

Client Merges with BDO USA

Moquist Thorvilson Kaufmann LLC (MTK) joined BDO USA on July 1 of this year. MTK brings its 60 staff, including 6 partners, and its strong reputation in the Twin Cities to BDO. Congratulations and best wishes to our friends at both the former MTK and at BDO!

Welcome New Clients!

The ConvergenceCoaching team welcomes our new clients to the ConvergenceCoaching circle of friends! Warmest welcome to:

Brown, Edwards & Company, LLP in Roanoke, VA
Katz, Sapper & Miller in Indianapolis, IN
Briscoe, Burke & Grigsby, LLP in Tulsa, OK
Saville, Dodgen & Company, PLLC in Dallas, TX
Baird Holm LLP in Omaha, NE
Goldleaf Partners in Baxter, MN
Hudson, Cisne & Co. LLP in Little Rock, AR
Berkowitz Pollack & Brant Advisors and Accountants in Miami, FL

We are grateful that you have taken the ConvergenceCoaching leap of faith and look forward to making a difference for your organization!

ConvergenceCoaching in the News

ConvergenceCoaching was featured in CCH's new white paper, *CPA Firms Succeeding in the New Economy*, as an expert on technology trends that support client acquisition and retention. The white paper discusses the findings from the nationwide CCH Leaders Now and Next Survey of CPA firm leaders and emerging leaders regarding how "pioneers" in the industry are thriving despite fluctuations of the economy and changing trends in the CPA profession. Download the paper at www.cchgroup.com/Leaders.

And, don't miss the key takeaways from Tamera Loerzel's sessions at the **AICPA 2013 E.D.G.E. Conference** in Austin, TX, which were featured in an article encouraging young CPAs to be proactive in their careers and make a difference. Read the article here: <http://bit.ly/1ecN8wV>.

Jen Wilson is also a regular guest blogger for the **CPA Insider** where she's been grappling with some of the big issues facing the profession. This year, some of the "lightning rod" topics she's covered include [A Dozen Public Accounting Ideas That Don't Work Anymore](#), [What's Your Firm's Path To Partner](#), [Do You Have What It Takes To Become a Partner](#), and [Is Complacency Holding You Back?](#) To subscribe to this weekly blog, go to <http://tinyurl.com/lvh4cs3>.

Upcoming Web Seminars

The ConvergenceCoaching team offers web seminars designed to help you develop "soft" skills in a variety of areas while earning continuing professional education (CPE) credit for only \$39 per person including CPE credit.

Join us for our upcoming 75-minute web seminars, which will be held at 11:00 a.m. Eastern Time on the following dates:

- **December 18 - Moving to an Anytime, Anywhere Workplace: A Panel Discussion**
- **January 21 - How Does Your Firm Stack Up: Benchmarking Your Firm**

Go to www.convergencelearning.com to review the agendas and to register. You can also purchase the recording for any web seminar you've missed for just \$39 at

www.convergencecoaching.com/news-and-events/recorded-webinars.

Upcoming Speaking Events!

It's not too early to make your spring conference plans. The ConvergenceCoaching team will attend and speak at a number of events after busy season, including:

May 5-7 - Las Vegas, NV

2014 BDO Seidman Alliance Conference

www.bdo.com

Presentations:

- > Great Firms Have a Vision For The Future! What's Yours?
- > The Top Three Factors Affecting Your Firm's Future
- > Successful Lead Generation Strategies
- > Succession Planning: Preparing Your Firm to Succeed Without You

May 14 - Malvern, PA

Pennsylvania Institute of CPAs Women's Conference

www.picpa.org

Presentations:

- > Managing Scope: The Art of Saying No
- > Delivering Transformative Feedback to Your Team

June 9-11 - Las Vegas, NV

AICPA 2014 Practitioners Symposium and TECH+ Conference

<http://bit.ly/d30NzY>

Presentation:

- > Time and Place Paradigms

June 17-20 - San Diego, CA

AAA 2014 National Practice Management Conference

www.cpaadmin.org/

Presentations:

- > Human Resource Fly-In Session: It's All About People - AGAIN!
- > Human Resource Breakout Session

Take a look at the content and register today! We'd love to see you so let us know if you will be attending any of these events.

To access our catalog with a complete listing of topics for **speaking, teaching, and custom in-firm programs**, visit www.convergencecoaching.com/what-we-do/training-development/, and to keep track of updates to our speaking calendar, please visit www.convergencecoaching.com/events/upcoming/.

Spread the Word!

If you know someone who would benefit from receiving their own copy of our Coaching Concepts

e-newsletters along with invitations to our web seminars and other events, e-mail their information to us at info@convergencecoaching.com.

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