

## Loosening the NextGen Reins

Issue 37 | Winter 2025

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### Wilson's Writings



#### Change Is Inevitable

I love a new year and the promise of change. As we enter 2017, the marketplace is changing faster than we've ever seen before. New disruptors loom. Our talent is under siege. Technology is moving at light speed. Anytime, Anywhere Work™ is taking hold. The face and expectations of our clients are changing. Our contemporaries or predecessors are retiring. And our NextGen is anxious to take over. In the face of all this, **we still see too many established leaders holding on to old norms, milking the old business model and resisting change. That's why we're dedicating this issue of Coaching Concepts to the subject of embracing change and engaging the NextGen leadership within your firm and your clients.**

In [Leadership Lessons](#), we'll explore the risks of resisting the market's pull and the strategies for letting go. And in [Practice Perspectives](#), we'll identify concrete strategies for elevating and empowering your NextGen leaders to step up and lead the firm forward in these uncertain - yet truly exciting - times.

Adaptation is the only sure way to sustain. And if the rate of change in your firm is glacial while the market is changing faster than the weather these days...well, sustainability won't be an option. **In 2017, make a commitment to let go and let your next generation lead.** Commit to innovation and nimble decision making. Shed old norms and develop new ones.

Change. Grow. Thrive.

*Jen*

**P.S. Don't miss our latest team and client updates in this issue's [New News](#) including information on our ever-growing [Transformational Leadership Program™](#). Our Spring program is open for enrollment. Classes typically fill fast, so act now to reserve a seat for your future leader.**

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## Leadership Lessons

### Strategies for “Giving In” To Change

**Change is hard. But it’s all over us!** In our nation’s administration, global influences, demographics, succession, mergers, technology and turnover, we’re experiencing change at a faster pace than ever before.

As firm leaders, we have to keep up to sustain our firms and ensure that they are attractive to Next Gen clients and team members. All too often, we see firms putting off needed changes for a variety of reasons. In this article, **we’ll explore some of the things slowing down change in our firms and identify strategies for overcoming these “change blockers.”** Then, in [Practice Perspectives](#), we’ll explore ideas for leveraging your NextGen resources to drive change in your firm, capitalizing on both their energy and unique perspectives.

#### ***So why is change proving to be so hard? And what can you do about it?***

Change meets resistance for a variety of reasons. Some of the common reasons change is blocked in CPA firms include:

- **Lack of visibility** – sometimes, firm leaders aren’t close enough to what’s happening in their markets. To avoid this “lack of knowing,” consider these ideas:
  - **Expose a range of firm leaders and talent!** Be careful that you aren’t hoarding exposure by sending only a few key firm leaders to industry events. **Make sure that MANY people from your firm are encouraged to attend events, conferences and web seminars as well as read trade publications, listen to podcasts and keep up with social media.** Be especially sure to hear one of the AICPA’s top executives speak on their take on Profession Trends every single year. The ideas for change are all there for you and your firm’s leaders if you seek them.
  - **Identify one owner in each of your firm’s industries, service lines and operational areas to follow and report back on trends affecting their area on a semi-annual basis.** When “everyone” owns doing something, no one owns it, so be sure at least ONE person is accountable for learning and educating the rest of their group.
  - **Ask your clients.** Regularly ask your clients for input on trends impacting their lives and businesses. Ask them to envision their accounting and advisory needs in the future and what they’d like to see you keep doing, stop doing and start doing going forward. Your clients have insights that can help you identify the highest priorities for change in your

firm.

- **Ask your people.** They're close to the clients. They know what they like and don't like. They have opinions and ideas. Empower them to share ideas for change without risk of being shut down or making a "career limiting move." ***Of all the ideas in this article, THIS ONE is likely to garner you the best list for possible change.***
  
- **Uncertainty of how to approach a change** – it would be great if there was a "paint by numbers" approach to every significant change. While there are best practices and methodologies for managing many changes, there is also a Wild, Wild West element of change happening in new and burgeoning areas of technology, HR programs and policies, service line expansion and delivery and more. To a certain degree, uncertainty is normal and expected when undertaking change. That said, to help gain more clarity:
  - **Ask us!** We know of many firms driving a wide variety of changes and we may be able to guide you, connect you with those undertaking similar projects, and help you avoid pitfalls, too.
  
  - **Talk to other firm leaders within your firm's network.** Find others who may have similar ideas for change and find out what they've done so far and what advice, resources or tools that they can supply.
  
  - **Assign a specific person to do the outreach and web-based searching for best practices and visible examples of the change you seek.** Have that person dig in and learn as much as they can and then report back their findings and recommendations so you can feel more certain about your approach to change.
  
- **Complacency** – we could write a book on this one (and maybe we should)! Too often, we meet leaders who feel accomplished and somewhat tired. You've been striving and you want an opportunity to rest and enjoy the fruits of your labors. After all, many of you are making great money. ***But the market is NOT resting and the money won't persist unless you keep at it!*** Instead:
  - **Consider how it looks to others.** People are not attracted to complacency. They're attracted to inspiration, passion, and possibility. When you and your fellow leaders seem to be snuggled up in a comfortable rut, your people and clients are not impressed. And this is one you can't fake. ***If you're not lit up about the prospects for your firm and actively engaged in embracing the future, how can you expect your people to be?***
  
  - **Find a trend that piques your interest.** One that falls into your interest area, whether it be efficiency, technology, talent, service delivery, operations – whatever it is. Rally your team to pursue change ideas in an area where you are passionate to reignite your energy for change. Once you see success in that change, pursue another change in another relevant area.
  
- **Selfish interest** – this is another major challenge for firms. All too often, firms aren't

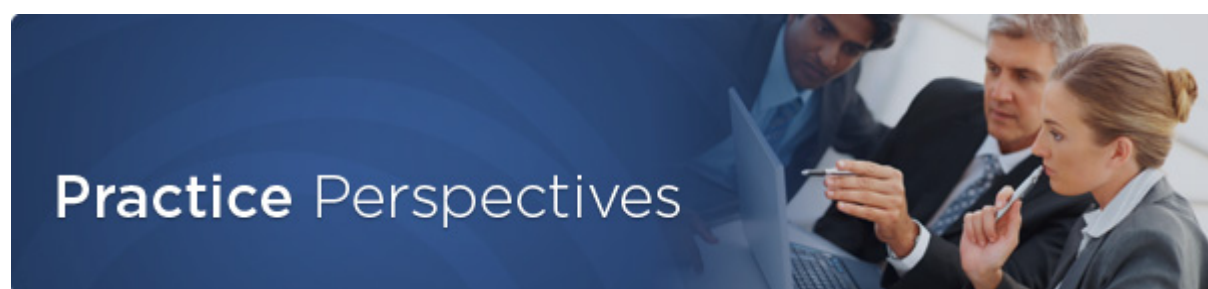
embracing change because someone fears that their pocketbook, their time, their prestige or their control will be impacted. It's true that change generally costs time, money and resources. **However, not changing can cost you your market position, clients, talent, profitability and, ultimately, your ability to successfully transition your firm to the next generation.** To address selfish interest head on:

- **Create a safe environment** where your partners and people can speak openly about their fears and concerns about change and its impact to them personally. Don't make expressions of selfish interest "wrong" because we all have needs and those needs drive our behavior. It is better to understand the selfish interest of your fellow leaders so you can mitigate loss where possible, or help others see where holding on to the way it is now will actually cause MORE loss in the long run.
  
- **A lack of leadership** – sometimes as leaders, we identify a change initiative but don't feel like we have the leadership capacity to address it. We want to drive the change, but we can't quite see who will do it, so we put it off. As an alternative:
  - **Empower your NextGen leaders** to address the change. Put together a cross-functional, cross-generational team, predominantly comprised of Millennial and Gen X team members and present the idea for change to them. Ask them to do the research, thinking and planning around the change and to present their detailed ideas for how you should tackle it. ***For more on empowering your NextGen leaders, read our [Practice Perspectives article](#).***
  
  - **Break the change into bits.** If the change is simply too big to take on all at once, break it into phases and task a piece of it for the coming year. You do not have to do it all at once and taking steps toward the change is better than standing still.
  
- **Fear of letting go of control** – most of us like being in control and having the power to make change, or block it, too. The rate of change today is too great for a small number of people to hold that power in your firm. By holding on too tightly, you will alienate your best and brightest and miss the opportunity to serve the NextGen clients in your community in the new ways they want and will soon expect. So:
  - **Give up the illusion of control.** Your success is only partly due to the brilliance and elbow grease of your leaders. The rest is at the whim of your clients and talent. And, the face of those people, the needs that they have and the way that they want to be managed, communicated with and served is changing. You cannot control those changes, but you can control your response to them – which needs to be thoughtful and swift.
  
  - **Empower your team and act as their coach.** If you care about your buyout, you'll want your team members to drive change and try new things NOW, while you're there to act as a coach, give input to strategy and help course correct when things fall off track. Instead of operating in the paternalistic, "father (or mother) knows best" way, begin shifting to a "what do you guys think?" method to bring your NextGen leaders along.

You have a tremendous opportunity to position your firm to thrive in the future but it means you have to let go of the past and embrace the future with all the change that it brings. The famous advice columnist, Ann Landers shared some wisdom for us, ***“Some people believe holding on is a sign of great strength. However, there are times when it takes much more strength to know when to let go and then do it.”***

It’s time to look for ways to let go and drive change together with your future leaders. And we’re here to help. For more information, listen to [Jen Wilson’s podcast conversation](#) with Dan Hood of *Accounting Today* where they talk about driving change in a resistant environment. [Or contact Jen directly by email.](#)

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### **Put Me In, Coach!**

***“Oh, put me in coach, I’m ready to play today  
Put me in coach, I’m ready to play today  
Look at me, I can be centerfield  
~“Centerfield” by John Fogerty***

This is the song we hear NextGen leaders singing across the country. Your NextGen are restless. They see opportunities for change and they want that change now.

The challenge for current leaders is harnessing this energy and the boundless possibilities your NextGen leaders are bringing to the table. As we discussed in [Leadership Lessons](#), **established leaders need to empower their future leaders and make room for them to make their impact on the firm, its clients and its people.** Your NextGen leaders don’t want to be told to “put their head down and do their time” or “your time will come when this firm is yours.” **Firms that figure out how to capitalize on the innovation of their Next Gen and truly drive change will create a pipeline of future leaders and realize increased top-line revenue and margin, as well as enhanced morale, team work and results.**

In this **Practice Perspectives** article, we’ll explore several ways you can put your NextGen “in the game” and capitalize on their energy and ideas. Some of the suggestions include:

- **Giving them meaning** – The “why” matters more than “what” for your future leaders. **Define your firm’s core purpose and the vision for where you’re headed - or better yet, have your future leaders help you define it since they will be the ones to fulfill on it.** Create a cross-functional committee with representation from each of your disciplines (including

admin), all levels, and each generation. Charge the group with developing your firm's vision, with approval from your partner team, and create strategies and actions on an annual basis to work towards fulfilling your vision.

Define exactly how each team member's role fits into that vision. It's very easy for employees to feel deeply disconnected from clients, leaders and how they fit in the future of your firm.

**Defining your "why" or sense of purpose and then providing a sense of belonging will help to enroll your team members in being a part of your firm's future.**

- **Investing in them** – When you invest in your future leaders, you're acknowledging their value and demonstrating your care and concern for their success—and not just the firm's. Investing in your future leaders goes beyond the normal 40 hours of CPE or holiday party or April 15<sup>th</sup> happy hour. To truly invest in them:
  - **Develop their soft skills and leadership skills** – via training and leadership development programs as well as coaching that could be from a combination of in-firm resources and external resources, too.
  - **Ensure that your firm's technology is leading edge** – including time-saving apps, video-conferencing, FAST internet and remote capabilities, scanning tools, and more. Your NextGen workforce expect access to quality, smart technology, as it is widely available and the costs keep coming down.
  - **Teach them how to manage a profitable professional services firm** – by teaching them practice economics, sharing the firm's financial picture (including your vision for the future and progress along the way – good and bad), and including them in planning meetings. Also, consider including senior managers or partner candidates as observers in your executive or management committee meetings or sometime participants in your partners' meetings.
- **Providing them with opportunities** – Identify all the places where you can "give your NextGen the experiences and opportunities they need to feel challenged, gain the much-needed experience they desire (and you need them to have!) and progress in their careers.

**Find opportunities to take them along so they can shadow client meetings and take on more responsibility. Bring them along to prospect and referral source meetings if you are active in this area or develop plans for you both to develop your marketing acumen as you get involved in networking groups together.** Yes, this is likely to incur non-billable time but it's an investment that will pay dividends for years to come. It is the best way for up-and-comers to gain the experience that traditionally took years to develop. Don't attend another event alone and encourage your contacts to do the same.

- **Empowering them** – Give them opportunities to own something. Owning doesn't mean they make all the decisions or have to do all the work; the owner is the facilitator of the thing that they own and are expected to do the planning and thinking for it, identify resources needed, communicating to other stakeholders, and being responsible for the success or failure of it.

Some areas that you can develop ownership in your NextGen and begin to truly empower them, include:

- **New aspects of an engagement** on every engagement with the goal that they supervise all of it in short order. Identify one or two goals for each engagement that your NextGen leader should achieve to take on new responsibility faster and keep them motivated with increased responsibility and challenge.
  - **Interacting directly with clients** with the goal of fully managing client relationships with your involvement only as needed. Your NextGen team members are used to working in teams and having access to all levels in school, volunteer organizations, church and more. They expect the same in your organization, including access to partners as well as clients. This is another opportunity to provide them the experiences, develop their soft skills and free current leaders to work at their highest and best use.
  - **Improving internal processes and efficiency** with oversight and direction (not control) by your service line leaders. Taking ownership of process improvement will help them identify steps that could be consolidated, completed by someone other than a CPA or addressed through technology. Your NextGen leaders are committed to work smarter, not harder and assigning them to figure out how to do that will help you address the talent shortage and provide educational opportunities for your NextGen to learn why things are done the way they are (and understand the balance of risk management, client service, scope management and being efficient).
  - **Managing and developing people** to provide leadership opportunities. In addition, you'll increase retention in your firm when every person is assigned a coach or career advisor who is charged with knowing, motivating and developing them, and while not everyone is cut out to be a career advisor, many of your NextGen leaders would love the opportunity!
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- **Knowing them, spend time with them and show you care** – Build rapport and relatedness with your NextGen leaders by regularly taking them to lunch or a conference where you can truly spend time with them. This kind of time gives you both the opportunity to learn about each other. Ask your NextGen what their motivators are at work, what they want to learn more about, what they like and don't like about their job and what support they need to be achieve their career goals. Don't forget to learn about their commitments outside of work, too, so you can fully support the whole person. Then, demonstrate your care by remembering what they told you and checking back in.

Share your journey, too, in the profession and at your firm, so they can see that there are many paths for progression and partnership. Tell them stories about mistakes you've made along the way, what you learned from them and how others supported your development. The power of this kind of vulnerability and genuine relatedness cannot be underestimated!

**Your NextGen will rise to the bar you set and in most firms, the bar you're setting could be much, much higher. It takes current leaders' willingness to trust, empower and let go. And**

**putting your NextGen - even if you're not sure they're ready - in the game.**

For more information, listen to Tamera Loerzel's [podcast conversation](#) with Dan Hood of *Accounting Today* where they talk about the NextGen being the bright future of our profession. Or, to explore how ConvergenceCoaching can help your current leaders develop their NextGen leaders, [contact Tamera directly by email](#).

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## **Emerging Trends and Survey Findings**

### **The ConvergenceCoaching 2016 Anytime, Anywhere Work™ Survey**

We are excited to share the results of our 3<sup>rd</sup> Annual Anytime, Anywhere Work™ Survey as we continue studying the adoption of flexibility programs in CPA firms. We received responses from 160 distinct firms on their adoption of flexible work initiatives and policies. We have written a variety of blog posts exploring findings from our survey, which you can access below:

- [Want to Keep Your Next Gen? FLEX! Our 2016 Anytime, Anywhere Work™ Survey Will Show You How](#)
- [Flexible Firms Are Moving to Unlimited PTO Programs](#)
- [Two Times the Benefits with Anytime, Anywhere Work™](#)
- [Anytime, Anywhere Work™, Survey Says Measure Differently to Flex Time](#)
- [Where is Your Firm with AnyWHERE Work Programs](#)
- [Seven Technology Strategies to Enable Your Flexible Work Programs](#)

And, if you missed our webinar summarizing the survey, you can access the recording here:

- [First-Hand Look: Findings from Our 2016 Anytime, Anywhere Work™ Survey Recorded Webinar](#)

**A few notable statistics from the published posts include the following:**



- 97% of firms allow team members to flex hours, which has held steady since 2015
- 51% of firms offer some sort of Fridays off benefit during the summer
- 39% of firms no longer mandate Saturday office hours, up from 36% in 2015 (but still too many firms still mandating Saturday hours – which is not good PR for our profession!)

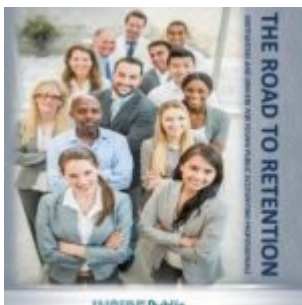
We are excited to see an increased number of firms this year offering unlimited time-off programs. We also learned about the gains that firms are experiencing in recruiting and retention efforts by employing flex benefits.

### **What is your firm doing to increase flexibility and Anytime, Anywhere Work™ ?**

If you have examples to share or want to ensure that you participate in next year’s survey, email [Renee Moelders](#). If you would like to receive our future survey posts, plus our other weekly blog posts, subscribe to our **Inspired Ideas** blog by clicking [here](#) and providing your email address in the “Subscribe Me” field.

### **ConvergenceCoaching and INSIDE Public Accounting Partner for “The Road to Retention: Motivators and Drivers for Young Public Accounting Professionals Survey”**

**INSIDE Public Accounting** and **ConvergenceCoaching** released results of an extensive survey conducted of young public accounting professionals aged 21-40 on their motivators and values within the profession. The report centers on the motivators and values of young CPAs in public accounting:



- 80% of respondents were from the all-important Millennial generation, aged 21-33, with 20% coming from the 34-40 age group. Male and female respondents were about evenly split at 51% and 49%, respectively.
- Topics discussed include the importance of work/life balance, flexibility, and clarity of their growth path.
- The survey also explores key differences explored between CPAs and Non-CPAs; men and women; various age categories; and varying levels of experience.

Download the executive summary and order your copy of the report [here](#).

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### **Knowledge Share Roundup**

ConvergenceCoaching partners with [AICPA CPA Insider](#), [Accounting Today](#) and other publications

to provide you with perspectives on the top issues facing the public accounting profession. We want to be sure you have access to those resources, so be sure to subscribe! See some of the samples of our recent articles, provided here for you:



- [\*\*3 “Must-Haves” for Retaining Top Talent\*\*](#)
- [\*\*5 Phrases Established Leaders Should Never Say Again\*\*](#)
- [\*\*Consulting Services Can Grow Your Firm - If Managed Properly\*\*](#)
- [\*\*How Firms Can Close the Gender Gap\*\*](#)
- [\*\*Retirement: Avoid the Pitfalls and Plan for the Possibilities\*\*](#)
- [\*\*Want to Keep Your Next Gen Leaders? Make These Changes ASAP!\*\*](#)
- [\*\*Want to Make More Money? Focus on Revenue-Producing Behaviors\*\*](#)

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#### Generational Viewpoints:

- [\*\*Help with a Hurdle\*\*](#)
- [\*\*Dress for Success - Why “Dress for Your Day” is the Policy of the Future\*\*](#)
- [\*\*New Keys to Attraction and Retention\*\*](#)
- [\*\*Remaining Relevant - Different Takes on Where the Profession Needs to Go\*\*](#)
- [\*\*New Ways of Making Rain\*\*](#)
- [\*\*All Around the World - How You Travel for Work Depends on How Old You Are\*\*](#)

#### HR Helpline:

- [\*\*Recruiting, Retaining and Developing Future Leaders\*\*](#)
- [\*\*Mute Meetings and Last Minute Leaders\*\*](#)

In addition to the partner article contributions above, there are several videos and podcasts available to you also:

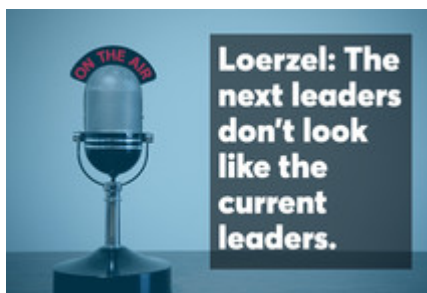
**Journal of Accountancy: Millennials need to show some respect; Boomers need to listen:**



**International Federation of Accountants: Who Is the Ideal Emerging Leader in Accounting Firms Today:**



**Accounting Today Podcast: Next Gen leaders: Smart, fearless and change-driven:**



## Accounting Today Podcast: Why won't partners change?



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### Service Spotlight: Professional Development Programs

If you or someone in your firm is seeking structured, long-term opportunities to develop leadership or business development skills, consider enrolling in one of our comprehensive professional development programs. Registration is open for both our 2017 Spring Transformational Leadership Program™ (TLP) and Rainmaker Development Program® (RDP).

#### Transformational Leadership Program™ (TLP)

Our year-long leadership program is specifically designed for your **high potential future leaders**. In it, we focus on key leadership areas that will enable your high potentials to be more **inspirational and effective leaders**. During the program year, individuals participate in:



## The Transformational Leadership Program Program Overview

The in-depth, year-long Transformational Leadership Program (TLP) is designed to help your future leaders honestly identify their strengths and areas for improvement and develop strategies and skills to drive performance improvements and prepare for meaningful roles in leading and managing your firm.

During the year-long program, each TLP participant will engage in:

**TRIMESTER 1** | Session One: June 1 to Sept. 30 or Session Two: Sept. 16 to Dec. 18

- Participating in a TLP kick-off web seminar to meet the other TLP participants and ConvergenceCoaching consultants and to understand the elements and expectations of the program.
- Completing an online self-assessment designed to uncover your self-perceptions and identify your true professional goals and desires.
- Taking the Myers-Briggs personality assessment to better understand your unique communication, decision-making, and teamwork preferences.
- Comparing your self-assessment inputs with the assessment of your in-firm coach to help focus on specific areas of strength and development.
- Participating in a mandatory TLP Class participants' web seminar and roundtable to discuss the Myers-Briggs assessment and explore ways to use the new insights gained to inform and support specific transformation goals for the program.
- Completing the first mandatory self-study course entitled, "Managing Difficult Conversations Successfully."
- Reading the ConvergenceCoaching e-book, "Straight Talk Your Way To Success"
- Engaging in a joint coaching call with a ConvergenceCoaching consultant and your in-firm coach to discuss and agree on your transformation goals.
- Attending the first two-day, in-person workshop entitled, "Learning to Truly Lead By Example," where we will
  - Enhance your ability to manage change within your firm and your life by understanding the psychology and mechanics of change, how to adjust to continuous change yourself, and methods for moving others you're leading along the change adoption curve.

- Two in-person workshops
- Three self-study courses
- Five virtual web seminars
- Six individual coaching calls

Participants focus on development in **three specific goal areas that** are tailored to their development objectives and they undertake an **in-firm project that benefits the firm and stretches them in ways that reinforce their development.**

Begin the transformation process for your high potential managers, senior managers, principals/directors, and new partners by enrolling them in our 2017 Spring TLP. For more details about the TLP, [read our program overview](#) or to register, visit [convergencelearning.com/transformational](http://convergencelearning.com/transformational). The one-year investment to transform each up-and-comer into a true firm leader is \$6,500 and the class size is limited to 26 participants.

### Rainmaker Development Program® (RDP)



The ability to develop business is a skill that most firms seek in their future

leaders. It is also the one area where professionals feel most uncomfortable. If you have one or more professionals who wish to become better business developers, consider enrolling them in our public Rainmaker Development Program® (RDP). This 6-month program provides a mix of learning and “real life” experiential activities to build real skills in personal marketing and business development.

During the RDP, participants engage in **six virtual roundtable sessions**, with video cameras deployed, on **buildable topics** related to critical **personal marketing** and **business development concepts**. Between sessions, RDP participants will be tasked to **complete assignments, reporting their progress** by the next session. In each subsequent roundtable, we discuss **challenges and successes**, learn the material for the next personal marketing concept and agree on a new assignment to **facilitate real learning** and **progress**.

#### **The dates and topics for our 2017 “public” RDP are as follows:**

- **Roundtable 1:** Developing as a Rainmaker – Monday, May 15 from 11am – 1pm CT
- **Roundtable 2:** Making a Bigger Difference for Your Clients – Monday, June 19 from 11am – 1pm CT
- **Roundtable 3:** Building Your Sphere of Influence – Monday, July 24 from 11am – 1pm CT
- **Roundtable 4:** Developing Referral Sources and Tracking Your Rainmaking Activities – Thursday, August 31 – 2pm – 4pm CT
- **Roundtable 5:** Sales Strategies to Close More Business – Monday, October 2 from 11am – 1pm CT
- **Roundtable 6:** Furthering Your Target Accounts and Building Thought Leadership – Monday, November 6 from 11am – 1pm CT

Our RDP is limited to **12 participants** from firms across the country. The cost to participate in the RDP is \$1,995 per person, including CPE credit. One new closed engagement will more than return your investment that should result from the learning in each session and homework activities. For more information or to enroll in the RDP, visit our [Learning Center](#).

If your firm has up to 12 individuals interested in elevating their rainmaking skills, we can also facilitate a custom program specifically for your firm.

For more information about the TLP and RDP, or to learn more about a custom program for your firm, contact [Brianna Johnson by email](#) or by phone at **402-639-4132**.

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#### **Client Corner**

##### ***Accounting Today Best Firms to Work For***

We truly admire our clients and friends that were honored as one of *Accounting Today's* 2016 **Best Accounting Firms to Work For** based on a two-part survey evaluating workplace policies and practices and anonymous employee feedback. Congratulations to **Barfield, Murphy, Shank & Smith LLC, Bland & Associates, P.C., Gelman, Rosenberg & Freedman, Haddox Reid Eubank**

**Betts PLLC, HoganTaylor LLP, James Moore & Co., Marvin and Company, P.C., Johanson & Yau Accountancy Corporation, MiddletonRaines + Zapata, LLP, Pannell Kerr Forster of Texas, P.C. (PKF Texas), Smith & Howard, Smith Leonard PLLC, WellsColeman, Wilkin & Guttenplan, PC, Williams Benator & Libby, LLP and Windes, Inc. We are so proud of your investment in your team and culture!**

### ***Accounting Today Top 100 VARs***

Congratulations are also in order to our friends and clients that were named to *Accounting Today's* 2016 **Top 100 VAR** list including: **Arxis Technology Inc., Central Consulting Group, Eide Bailly, Stambaugh Ness Business Solutions, and Warren Averett Technology Group.**

Congratulations to your teams!

### ***Welcome New Clients!***

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

**Albrecht, Viggiano, Zurkek & Company, P.C.** in Hauppauge, NY

**Bland & Associates** in Omaha, NE

**Brock Schechter & Polakoff, LLP** in Buffalo, NY

**Cooper Norman CPA & Business Advisors** in Boise, ID

**Crowe BGK** in Montreal, Canada

**Henry & Peters, P.C.** in Tyler, TX

**Johnson, Miller & Co. P.C.** in Midland, TX

**Kruggel Lawton CPAs** in Elkhart, IN

**Piccerelli, Gilstein & Co. LLP** in Providence, RI

**Rodman CPAs** in Waltham, MA

**Sensiba San Filippo, LLP** in San Jose, CA

**Thompson Greenspon** in Fairfax, VA

**TJS Deemer Dana LLP** in Savannah, GA

**Warren Averett, LLC** in Montgomery, AL

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

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### **Awards and Mentions**

***Top 100 Most Influential People and Most Recommended Consultants for 2016!***

## 2016 TOP 100 PEOPLE

JENNIFER WILSON  
Co-founder and owner,  
ConvergenceCoaching



Already influential from her work inside firms as a consultant, Wilson continues to expand her influence with new surveys and programs on issues that are crucial to the profession, as well as frequent speaking engagements and webinars.

Votes (of 125 responses):  
8

NO. 9

Congratulations to co-founder and partner, Jennifer Wilson, for being recognized as one of *Accounting Today's* [2016 Top 100 Most Influential People in Accounting](#), this year ranking in the top 10.

Jennifer is also grateful to be recognized by *INSIDE Public Accounting* on their list of [2016 IPA Most Recommended Consultants!](#)

Thank you to the award and list sponsors and also our clients and friends for their continued support of our mission to transform teams, drive change and help leaders achieve success. We are humbled and grateful.

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### Upcoming Speaking Events

The ConvergenceCoaching team will attend and speak at a number of events this summer, including:

**March 22-23** - Helena, MT

#### Industry Conference

[www.mscca.org](http://www.mscca.org)

#### Presentations:

- > Four Winning Strategies Every Woman CPA Should Know
- > Providing Awkward Feedback Effectively

**April 25 @ 11am - 12:30pm ET** - Virtual

#### Web Seminar

[www.convergencelearning.com](http://www.convergencelearning.com)

#### Presentations:

- > Partner Transition Panel - Letting Go with Grace

**May 2** - Las Vegas, NV

#### 2017 BDO Alliance Conference

[www.bdo.com](http://www.bdo.com)

#### Presentations:

- > Providing Tricky Feedback Effectively
- > Strategies to Truly Engage and Retain Your People
- > Market Prominence: What Does It Take to Dominate Your Market?



**May 10** – Malvern, PA

**Pennsylvania Institute of Certified Public Accountants Women's Conference**

[www.picpa.org](http://www.picpa.org)

**Presentations:**

- > Mentoring Your NextGen Leaders
- > Closing the Gender Gap

**June 12-15** – Las Vegas, NV

**AICPA Practitioners Symposium and Tech+ Conference**

[www.aicpaengage.com](http://www.aicpaengage.com)

**Presentations:**

- > The Psychology of Letting Go – Retiring With Grace
- > Effectively Transitioning Responsibility from One Generation to Another
- > Improve Retention By Engaging Your People

**June 15** – Memphis, TN

**CPAmerica's 2017 A&A Conference**

[www.cpamerica.org](http://www.cpamerica.org)

**Presentations:**

- > If You Want to Keep Your Next Gen, Do These 9 Things
- > Using Social Media to Drive Growth

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.

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