



Issue 19 - Spring 2008

Welcome to **Coaching Concepts**, the quarterly newsletter brought to you by the consultants at **ConvergenceCoaching, LLC**.



Wilson's Writings

We hope you are closing a successful (and profitable!) 2008 busy season. Now that it is over, some of us are ready to unpack our bags – on each other!

I'm referring to the **post-busy season traumatic stress syndrome** we sometimes witness where fellow partners and team members are so weighed down by disappointments, disagreements, unfulfilled expectations, perceived slights, or other conflicts that they want to completely unload, especially after months of longer hours and the pressure of impending deadlines. Most of us hold these problems in, sapping energy and motivation, because we don't know how to communicate our conflict in a way that will generate a breakthrough. That's where this issue of Coaching Concepts comes in!

We've dedicated this issue to the topic of powerful, strategic conflict management. In Leadership Lessons, you'll gain some insights into how you typically manage conflict today and how you're wired to generate negative – even ugly (!) - interpretations of certain conflicts that can stop you from handling them successfully. In Practice Perspectives, you'll learn our proven 8-step conflict management methodology and gain the confidence and skill you need to address performance issues, disappointments, misunderstandings, and disagreements that may have occurred in the past and those that will occur in your future. Please take a few moments to read these articles. These insights and the technology of managing conflict can genuinely change your life!

And, please don't miss this issue's New News. **We'd like you to join us in welcoming Lisa Spear, our newest team member, and to read about our newest service offering – personality assessments for teams and individuals.** Take a peek and catch up on all of our news. Thanks to you, we have a lot of news to share!

Spring is the time to plant seeds that will lead to growth and development so you can reap the harvest later in the year – before your winter busy season begins again. Let's clean up our conflicts, generate some relationship breakthroughs, and then focus our considerable energies on making hay while the sun's still shining!

Jen

Leadership Lessons

Manage Conflict Powerfully for Breakthrough Results

Whether it is owner disagreements, performance issues, vendor relations matters, client concerns, or competitive situations, our professional lives are filled with opportunities to manage conflict. However, most of us, given the choice, will shy away or ignore conflict rather than deal with it. Why? More than likely, it's because conflict isn't fun – or even comfortable. However, those who are able to manage conflict collaboratively often have the most success and inspiration in their work and in their lives. That is why we've dedicated this Leadership Lessons to exploring our natural tendencies in handling conflict and what is possible when conflict is dealt with strategically.

We tend to focus on the negative aspects of conflict, such as the consequences and impacts that the conflict is having on us and others. We also focus on our feelings, which are mostly negative, and see it as draining our energy, reducing our focus, causing discomfort, and ultimately costing us time and money. This can be true, but only when we allow conflict to persist.

If conflict is well-managed, it can also have a very positive, transforming influence on your practice. Conflict typically highlights problems and promotes change. It often encourages shared solutions and can enhance the morale and team spirit of your practice when it is dealt with openly and promptly. Conflict can also stimulate the creativity and innovation in your organization.

To further develop your conflict management skills and ensure that conflict has a positive influence on your practice, it is important to identify your "normal" methods for dealing with conflict and then develop the ability to consciously choose a more effective method to manage conflicts whenever possible.

So, What Is Your Conflict Management Style?

Most people have a typical method for managing conflict when it arises. However, we're all capable of switching conflict styles and typically use several or all of the four common methods, depending upon the situation, timing, and the person with whom we're experiencing the conflict.

When conflict arises in your practice, do you...

- **Avoid it?** The conflict avoider often develops rationale for the conflict, dodges meetings or conversations where conflict is present, and hopes that someone else will handle the problem or that the conflict will resolve itself on its own. It rarely does!
- **Give in to the conflicting party?** This accommodator gives in to another party's wishes, eschewing their own goals to resolve the conflict.
- **Compete with the conflicting party in an attempt to win or be "most right?"** Usually, this conflict style is exhibited by an unwillingness to compromise and a dominating approach to force an outcome. Unfortunately, this rarely produces a "real" winner as the underlying source of conflict is never resolved and the matter usually becomes personal.
- **Compromise?** If so, you're probably a pretty good peacemaker, agreeing to give something up, provided the other party does the same, so that a conflict can be resolved, but it's often temporary and usually doesn't address the underlying cause of the conflict.

Avoiding, giving in, competing, and compromising are all valid methods for "dealing" with conflict, but they won't generate the kind of positive energy that is possible when you **manage conflict collaboratively**.

To develop a collaborative conflict management solution, both parties work together to create a solution that allows them to achieve their desired outcome (or close to it!) by changing something and appealing to the major common goals. To do so, self honesty, and the willingness to share it, are required. When we get honest, our "selfish interest" in the matter usually revolves around our need to:

- Look good or avoid looking bad
- Have more time or use less of our time
- Get more money or lose less of our money
- Experience pleasure, peace, or some form of feeling good or avoid feeling bad, stressed, or put out

Your goal is to identify your selfish interest – what you're afraid of losing because of this conflict - and also create an environment where your conflict partner can be honest about their self interest because you cannot collaborate until all agendas are on the table. There are very few real "Mother Theresa's" in this world and we all want things to work out "our way" or there wouldn't be a conflict in the first place.

For instance, when a member of your team appears to have a habit of turning their work in past the due date, your selfish interest may be that their late delivery is impinging upon your time, making you work late or reprioritize other work to rush their late project through to make sure it doesn't impact the client. Or, their tardiness may cause you to look bad because it delays the project to the client, who is then disappointed. This may frustrate you or stress you out. Your self interest in managing this conflict is to be better able to manage your time, look better with the client, and be more relaxed when your team member begins to deliver as committed.

In addition to getting all self-interest out on the table, it is important to acknowledge that there are many potential reasons or causes for each conflict, although we usually approach the conflict as if we already know what the reasons are before gaining critical and honest information from our conflict partner. Unfortunately, we tend to spend time interpreting the upset or disappointment and "making up" why we think it is happening – often generating ugly or negative interpretations of the conflict. When you approach the conflict believing your ugly interpretations of the possible reasons or causes, how you handle the conflict could come from a negative place.

Using our earlier example where your teammate habitually turns in work late, you may naturally interpret this as their being disorganized, not caring about you or the client, being irresponsible, plotting against you to make you look bad with your clients and superiors, and more. While these may seem over the edge in terms of ugliness, our natural tendency is to subconsciously generate negative reasons for why other people are doing things that affect our self interest. Now that you've read this, start paying attention to your natural tendency to play judge, jury, and executioner in your conflicts, which leads you to then use your dominant conflict style of avoiding, giving in, competing, or compromising.

To have some power over the negative emotions of conflict, consciously and overtly generate a list of hopeful interpretations for the potential reasons the conflict exists before you enter into a conversation with your conflict partner. This will require discipline and some creativity as most of us are not wired to do so. Using our example of "The Late Person" above, some hopeful interpretations may be that you haven't been clear about the due dates or that he or she doesn't understand the entire work product cycle - so doesn't realize the considerable work you still have to do after you receive the deliverable. Another possibility is that this person has too much work due to your staff shortage and that the work isn't being scheduled or balanced properly. **When you generate hopeful interpretations, you can give up being victim to someone else's bad behavior and start to look for places where you may have responsibility for the conflict.**

This process of identifying the ugly and hopeful interpretations of your conflicts enables you to see that you do not really know what's

going on without speaking to your conflict partner. Instead, you'll have to have a collaborative conversation devoid of your interpretations so you can play "detective," searching for clues and causes for the conflict rather than already "knowing" and approaching the matter in a way that inhibits collaboration.

Identifying your self-interest and that of your conflict partner and acknowledging your interpretations for the possible reasons the conflict exists will enable you to be more strategic in your approach to managing difficult situations and begin the process for genuine open communication. Only then can you honestly examine each other's goals and collaboratively develop win-win solutions.

In our [Practice Perspectives](#) article, we'll share a step-by-step conflict management methodology and provide some sample "conflict scripts" that will help you prepare to have confident and difference-making conflict conversations with others. For more information about how to have collaborative conflict conversations, contact Jennifer Wilson at jen@convergencecoaching.com.

Practice Perspectives

A Conflict Management Methodology

In [Leadership Lessons](#), we shared how conflict – despite its negative connotation - can be positive, highlighting issues and encouraging conversations and solutions. We also discussed the four dominant ways people handle conflict and the self interest that is threatened when conflict arises. In this article, we'll explore a step-by-step conflict management methodology that will help you to put your "knee-jerk" conflict management style aside to have more powerful, strategic, and collaborative conflict conversations.

Step 1. The first step in managing conflict successfully is **defining the conflict** itself. In this step, you'll acknowledge that a conflict exists and begin exploring the reasons that might be causing it. Consider all possibilities, from the worst case, ugliest interpretations to the most hopeful potential view of the situation (looking for places where you may be 100% responsible). When you take the time to contemplate potential reasons for the issue, you will probably discover that responsibility does not lie entirely with the other party, and you may begin to see another side to the conflict situation. For instance, using our example from [Leadership Lessons](#), one potential reason for your teammate not completing their projects on time could be a lack of communication about their due date or a lack of clarity about the additional steps that have to occur once the deliverable is turned into you – a lack of understanding and empathy caused by a communication failure. Another possible reason is that the staff person's workload is not balanced properly. This step alone should begin to ease your feelings of frustration and powerlessness in the conflict.

Use our conflict methodology tool, found [here](#), to document your thoughts for this and the following steps in the process. This tool, once filled in by you, is "for your eyes only" – not to be shared with your conflict partner - and will help you prepare your strategy for the conflict conversation.

Step 2. The second step is to **commit to discuss the conflict** with the other party or parties. These conversations are best done "live" – in person if possible and on the phone if not (never in e-mail!). Be sure that the conversation is in a private setting so you can both speak freely and scheduled for a length of time that truly allows you to explore all the issues and solutions.

Step 3. Then you will **prepare for the conflict conversation** by outlining your view of the situation without blame. Simply write down the facts that resulted in the conflict. Use the **expectation, observation methodology** to communicate what you expected and what actually happened (the gap in performance). In the example given, you would acknowledge that you expected the project to be delivered by X and that the project was not delivered by that date. Even if you feel this has happened on other occasions, you would only provide them as examples if you can give the same level of specificity, documenting them as part of your pre-discussion preparation.

In this step, you'll also consider the potential or actual impacts of the conflict. The impacts for the example given could be the additional pressure placed on other members of the team to rush the job to meet the client commitment or client disappointment or dissatisfaction if the delivery commitment was not kept with them, which can lead to billing disputes or even client departures. The inability to count on specific delivery performance can also erode the trust of the team or the client.

The last aspect of the preparation step is to examine possible solutions to the conflict based upon the different potential reasons you considered in step one. Using our example, if the reason the project was not delivered on time is because the staff person hasn't had enough time to complete all the projects they have assigned, potential solutions could be to allow them the flexibility to work from home, have them regularly publish a list of their workload to allow you to re-prioritize if needed, or assign projects – or portions of them – to other team members with more bandwidth.

Step 4. Once you've thought through several potential hopeful reasons and solutions for your conflict situation, you are ready to meet with your conflict partner and **share your view of the conflict**. In this step, you'll identify your *expectation* and *observation* of the situation as you outlined in writing. Avoid placing blame or using inflammatory words like "always," "never," and "should have." Instead, simply share your view based on facts using, "I expected this, but I observed something else; why is that?" language. This conversation may sound like, "I had expected the delivery of the Smith tax return to me by close of business Wednesday, but I didn't receive it until Friday morning. Why is that?" You will always end with an *inquiry* to encourage the other party to speak, so your next action is to *stop*.

Step 5. The inquiry from Step 4 will allow you to transition to the most important step in the conflict management methodology – the part where your conflict partner shares and you **listen**. Your conflict partner is likely to give you new information or a perspective that will

provide clues to the root cause of the conflict and point to potential ways to solve the conflict. Listen for ways that your “made up” interpretations of the situation differ from the facts you hear!

In our example, the individual might share that they thought their behavior was acceptable because they are busy with many client commitments and have noted that you are frequently late with your client deliverables, too, due to the high volume of work in your department. This new piece of information may cause you to contemplate a variation on the potential solutions you brainstormed in step three.

Step 6. The next step is to **discuss the impacts and what you’re committed to** in order to reach a resolution. You’ll outline the impacts you thought through in step three and ask if your conflict partner sees any others. In our sample scenario, you might say, “I realize that I am sometimes late on client deliverables and didn’t realize that you were taking your queue from me, but I should have. The impact of late deliverables from anyone is that they generate pressure and rushed work from co-workers. When we deliver late to our clients, they begin to distrust our commitments, become disappointed, call us to ask about them, and we have to spend energy explaining our delays. This could lead to client loss. I am committed that we keep our client promises, are respectful of our other team members, and deliver what we say we’re going to on time.”

Step 7. You’re now ready to ask for help in **developing a solution** and listen while your conflict partner suggests some. The solutions suggested may not meet your expectations or you may not believe they will lead to success. In that case, you can collaboratively suggest alternative ideas or proposed solutions.

The solution development stage may take some time back and forth to come to an agreed upon plan of action. In our example, you and the employee may both commit to proactively reset expectations with the team and the client if you are going to run late, not commit to take on projects with by-when dates that you cannot meet, and also publish a list of current projects and due dates weekly to the team to avoid similar future instances. This step will end with your asking a question to ensure that your conflict partner is enrolled in the solution. You could say something like, “How do you feel about this plan? Do you think these steps will enable you to deliver on time?” It is also important to acknowledge the other individual for working through the situation with you and thank them for the collaborative effort.

Step 8. The final step is to document your understanding of the action plan in a brief e-mail to your conflict partner, detailing the specific actions you both committed to and the date those actions will be complete. This will eliminate future conflicts about the resolution due to communication gaps. Ask the individual to respond with any corrections or comments to ensure you are on the same page. Then do what you said you would do by the date you said you would do it - and expect the same of your conflict partner!

Despite the apprehension that conflicts can create, they can produce breakthroughs in your relationships, your own performance, and in your firm when you manage them quickly, strategically, and with a commitment to collaborate. Follow our *expectation, observation, inquiry, stop* conflict methodology to develop or enhance your conflict resolution capabilities with everyone in your life - partners, employees, peers, and even your family members! For more information about how to have effective and powerful conflict conversations, contact Krista Remer at krista@convergencecoaching.com.

News News

Our Team Has Grown!

We’re pleased to announce the addition of Lisa Spear to the ConvergenceCoaching team! Lisa is our Sales and Marketing Coordinator, assisting with our speaking and training coordination and business development activities. Lisa is a former co-worker of Jen, Tamera, and Ruth from our “prior lives” and brings her strong background in sales and marketing administration to our team. We are so blessed to be working with Lisa again! Please join us in welcoming Lisa and introduce yourself to her at lisa@convergencecoaching.com.

Service Spotlight: Enhance Team Communication and Effectiveness Via Personality Assessments

Have you ever wondered why you act (or react) the way you do? We know you’ve wondered why others act (or react) the way they do! Many factors affect our unique approach to life, work, and relationships, but one of the most powerful factors is our personality. Understanding your personality and how it relates to others will enable you to build empathy within your teams and with clients and to develop communications and processes that best fit the unique differences that exist.

That’s why we began to study the various personality assessments in the marketplace and have become qualified to administer the Myers-Brigg Type Indicator (MBTI), a personality assessment tool that helps identify individual and team personality types and preferences. When members of your team take the MBTI assessment, your individual and “group” types can be identified and the similarities and differences between your fellow team members are highlighted, helping you to improve the effectiveness of your team.

Exploring your individual and team personalities can enable you to:

- Identify and leverage the strengths of individuals and of your team as a whole
- Make plans to address agreed upon individual and team weaknesses
- Identify areas of similarity and differences within your team so you can be informed when:

- Communicating with each other
- Developing processes
- Deploying members of the team
- Provide ongoing leadership development for the existing and future leaders in your firm

If you would like to find out more about the personality assessment process and how it can enhance your leadership team, contact Tamera Loerzel at tamera@convergencecoaching.com.

Leadership Development Training Opportunities

ConvergenceCoaching is collaborating with some key associations and alliances to provide much sought-after leadership development training this summer!

AAA and CC, LLC Leadership Workshop

We are co-sponsoring a one-day Leadership Development Workshop with the Association for Accounting Administration (AAA) on May 29, 2008 in Omaha, Nebraska. Firm leaders who attend will gain access to practical information and tools in leadership, accountability, communication, conflict management, and meeting facilitation. Click [here](#) for more detailed information, and register by clicking [here](#).

BDO Seidman Alliance Future Leader and Partner Training

ConvergenceCoaching is also collaborating with BDO Seidman to offer their alliance members Future Leader and Partner Training! Our 2008 session schedule is:

Future Leaders Training (for supervisors, managers, and newer partners)

June 17-18, Chicago: Leadership Fundamentals and Communication and Meeting Facilitation Skills

July 15-16, Chicago: Business and People Development Strategies

July 23-25, Chicago: Managing Diverse Work Teams and Delivering Compelling Presentations

October 28-30, Location TBD: Managing Diverse Work Teams and Delivering Compelling Presentations

Partner Training

July 15-16, Chicago: Leadership Fundamentals and Communication and Meeting Facilitation Skills

December 2-3, Chicago: Strategies for Motivating and Managing Diverse Teams

Future Leaders Training (for professional and administrative staff)

August 5-6, Location TBD: Staff and Admin Development: A Focus on Personal Productivity and Professionalism

Click [here](#) to download detailed agendas and information for our Partner Leader Training and [here](#) for our Future Leaders Training.

ITA and CC, LLC Leadership Workshops

In addition, ConvergenceCoaching and the Information Technology Alliance are co-sponsoring two-day Leadership Development Workshops, tentatively scheduled for July 8-9 and September 9-10 in Dallas, TX and Baltimore, MD. Download our flyer [here](#).

For more information about these events or if you would like to discuss tailored web-based or in-firm training for your firm or association, please download our course and workshop catalog by clicking [here](#) and contact Lisa Spear at lisa@convergencecoaching.com or (615) 292-9321.

Young People Rule!

ConvergenceCoaching had the opportunity to write a recent article for the *Practical Accountant*, entitled "Young People Rule!" In this article, we make the case that, "...you must develop a culture that focuses real energy—time, people, and money—on programs designed to attract and retain young talent. Those that achieve this will have the best chance of success, and those that don't will disappear in the inevitable consolidation that our nation's aging, and subsequent leadership shortage, will bring."

Be sure to read the full article [here](#).

Self-Study Courses for Practice Growth

More than ever, CPA firms in today's economic environment need to create and implement effective sales and marketing strategies to make certain they close the right engagements and focus on the right clients for their firms. The trouble is, sales and marketing is not necessarily a core competence in the profession, and most of us don't have the time to take the courses to become knowledgeable in it.

That's why we developed two inexpensive, self-study video-based CPE courses in conjunction with the AICPA: Marketing: Successful Strategies for CPA Firms and Successful Selling Strategies for CPA Firms.

Receive a **20% discount** when you buy one or both videos by August 29! Use promotion code **RUV** when you place your order at www.cpa2biz.com or call 888-777-7077. Generate more opportunities for your practice by implementing our proven marketing and sales strategies within your firm!

Upcoming Speaking Events!

The ConvergenceCoaching team will be attending and speaking at several events over the next several months, including:

May 19-20

Accountants Global Network (AGN)

North American Regional Meeting
Seattle, WA

www.agn-na.org

Presentations:

- > Recruiting is a Marketing Function!
- > Delivering Effective Performance Feedback

May 21

Missouri Society of CPAs

Small Firms Conference
Columbia, MO

www.mocpa.org

Presentation:

- > Leadership Distinctions that Will Transform Your Firm's Performance

May 29

Association for Accounting Administration (AAA)

Hilton Qwest
Omaha, NE

www.cpaadmin.org

Presentation:

- > Leadership Workshop: Developing Leadership and Accountability

June 3 - 4

AICPA

Emerging Partner Training Forum
Scottsdale, AZ

www.cpa2biz.com/conferences

Presentations:

- > Acting with Ownership and Accountability
- > Managing Difficult Conversations Successfully

June 5

Association for Accounting Marketing

AAM Summit 2008
San Diego, CA

www.accountingmarketing.org

Presentations:

- > Managing Difficult Conversations Successfully

June 17

Association for Accounting Administration (AAA)

Practice Management Conference
Dallas, TX

www.cpaadmin.org

Presentations:

- > Human Resources Fly-In

June 17-18

BDO Seidman

Future Leaders Training for Supervisors, Managers and Newer Partners

Chicago, IL
manastas@bdo.com

Presentations:

- > Leadership Fundamentals
- > Communication and Meeting Facilitation Skills

July 15-16

BDO Seidman

Future Leaders Training for Partners
Chicago, IL

manastas@bdo.com

Presentations:

- > Leadership Fundamentals
- > Communication and Meeting Facilitation Skills

July 15-16

BDO Seidman

Future Leaders Training for Supervisors, Managers and Newer Partners
Chicago, IL

manastas@bdo.com

Presentations:

- > Business & People Development Strategies

July 23-25

BDO Seidman

Future Leaders Training for Supervisors, Managers and Newer Partners
Chicago, IL

manastas@bdo.com

Presentations:

- > Managing Diverse Work Teams
- > Delivering Compelling Presentations

August 5-6

BDO Seidman

Future Leaders Training for Professional and Administrative Staff
Location: TBD

manastas@bdo.com

Presentations:

- > Staff and Administrative Development: A Focus on Personal Productivity and Professionalism

August 22

Iowa Society of CPAs

Des Moines, IA

www.iacpa.org

Presentation:

- > Emerging Leaders Workshop

August 26

Boomer Consulting

Boomer Technology Circle Conference
Kansas City, MO

www.boomer.com

Presentations:

- > Leveraging Technology to Promote Diversity

We hope to see you at these events and others in the future. Check your calendars and plan to register today! For a complete listing and future updates on topics to be presented, please visit www.convergencecoaching.com/speakingevents.htm.

Please let us know if you will be attending any of the venues where we will be speaking. We'd love to catch up with you!

Client Corner

Stellar Retreats!

Two of our clients were featured in the March *Practical Accountant* cover story for their innovative planning and strategic retreats. Jack Hinsche of Windes & McClaughry Accountancy Corporation and Vince Rettig of RBSK Partners shared their firm's retreat experiences and best practices for the betterment of others. We also had the opportunity to contribute our thoughts on retreat facilitation in this piece. Check out the full article [here!](#)

2008 PCPS/TSCPA National MAP Survey

Do you wonder how your firm stacks up against others in your region and firms of similar size around the country? Find out by taking part in the PCPS/TSCPA National MAP Survey. The 2008 survey is shorter and more focused (with 40% fewer questions) than previous years. User-friendly results are also more targeted so you can easily extract the data you need to make important decisions and build a more profitable practice.

Participants will receive a free summary results report containing key performance metrics such as billing rates, salaries, hours charged/compensated, services as a percentage of fees, major income statement statistics, and more. The comprehensive report, available for purchase and free to PCPS members, will include every performance metric gathered by the survey, cross-referenced against many relevant comparison groups, and additional ratios and analyses of statistics.

To take the MAP survey, please visit <http://map.pcps.org>. The survey will close on July 11, so don't miss the opportunity to participate and get valuable insight to your firm's comparables!

Welcome New Clients!

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

Beard Miller Company, LLP of Reading, PA
Capossela, Cohen, LLC of Southport, CT
Hartman Leito & Bolt LLP of Fort Worth, TX
Hutchinson & Bloodgood, LLP of Glendale, CA
Jelinek Metz McDonald, Ltd. of Hopkins, MN
Kiesling Associates, LLP of Madison, WI
Miller Grossbard & Associates of Houston, TX

We are excited that you have taken the ConvergenceCoaching leap of faith and look forward to making a difference for you and introducing you to our network of clients and friends!

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.