



Wilson's Writings

Happy Spring! **We're especially happy at ConvergenceCoaching, having just celebrated our 9th anniversary thanks to our partnership and friendship with you.** To mark the occasion, we're easing into a new look-and-feel for our e-letter and e-mail notices. We'll be flowing this look into other areas of our firm's communications in the weeks and months to come.

As we head into the more proactive summer months, an inevitable part of planning turns to firm training. And we all know that CPE is essential to our success, because in the accounting and technology professions, we are, first and foremost, in the knowledge business. **The more we know, the more value we bring to our clients.** Economic impacts, new legislation and regulation, competitive advances, and technology innovations all drive us to learn quickly and assimilate our learning into new behaviors even faster.

That's why we've dedicated this issue of *Coaching Concepts* to learning management. In [Leadership Lessons](#), we'll explore the keys to developing a top-down, authentic learning culture in your firm. Then, in [Practice Perspectives](#), my partner Tamera Loerzel will share the steps to developing your firm's Learning Initiative Plan and Individual Learning Roadmaps. Finally, [New News](#) will update you on all of the latest happenings in our firm, including the **upcoming launch of a new online learning platform, offering anytime, anywhere soft skills CPE designed for CPA and IT professionals.** Take a look at our first three courses and see how this offering and our other training and development courses and workshops may help your firm succeed.

We welcome your feedback on our ideas and encourage you to share some of your own with us, too. Enjoy the renewal of spring!

Gratefully,

Jen

Leadership Lessons Creating a Learning Culture

We're all in the knowledge business, and those firms that do the best job of imparting knowledge, developing skills, and building capacity for the future have the best prospects for long-term success and competitive advantage. In this article, we'll explore ideas to help you enhance your firm's learning culture and make a commitment to life-long learning. Then, in our [Practice Perspectives](#) article, we'll explore the specific steps to developing your firm's Learning Initiative Plan and implementing Individual Learning Roadmaps to increase your educational capacity and enhance your firm's accumulation of knowledge.

What is a Learning Culture?

A learning culture is one where everyone in your firm is committed to gaining new skills, exploring new behaviors, and continually furthering your collective understanding of the issues facing your firm and clients.

To develop a learning culture, you must first model a top-down commitment to learning, starting with your firm's leaders (including your CEO, Managing Partner, partner group, and other key managers) by:

- Expressing your **commitment to learning**
- Investing **time, money, and resources** to demonstrate your commitment to learning
- Recognizing the importance of **life-long learning**, where you believe that you can always personally improve, no matter your age or experience level, and modeling your commitment to continuous learning by attending conferences and courses, reading books, and changing your behaviors based on your learning
- Designating a **learning function in the firm**, assigning an owner to it, and then making sure that there are a variety of learning opportunities offered to all people, at all levels in your firm
- **Measuring the impact** that learning has on your firm and holding your leaders accountable for learning results

Do As I Say and As I Do

To commit to life-long learning, it may mean humbling yourself and admitting that you **can still improve, learn new things, and change behaviors at any stage of your career**. Most of us want to feel like we've reached a certain level that makes us teachers, not learners, and that we need to facilitate others in their learning - but not focus as much on our own.

When we take this approach, two things can happen. First, resisting your own personal development and growth can be disheartening to your team, because they see your areas for improvement and are interested in seeing you improve, too. Second, when you act as if you are "above" learning, then others begin to rationalize that their experience or level somehow lets them off the hook, too, and your organization starts to decline in its accumulation of knowledge capital.

When we ask you to recommit to learning for yourself, we're not just looking for a verbal commitment. Instead, we suggest that you demonstrate your belief by showing up at learning functions, paying attention, participating, asking questions, and staying for the entire event, no matter how busy you are or how important your work is outside of the learning event.

Adopt a Learner-Led Learning Approach

Another key to developing a learning culture is to establish the expectation that each learner will drive their own learning experiences. In educational circles, this is called learner-led learning, where the onus to take ownership of the learning roadmap and ensure that they receive the training and education they need lies with the student or learner.

At ConvergenceCoaching, we advocate starting this on day one by giving all new employees a New Employee Orientation Checklist ([click here](#) for our template) and having them take ownership to complete it, versus putting the impetus on the always-busy hiring manager to manage the process to make sure it happens. You can keep this momentum going by implementing the Individual Learning Roadmaps discussed in [Practice Perspectives](#) and by assigning clear ownership of each Roadmap to the learner themselves. Learners who drive their own learning will participate more fully and make sure that they gain the information they need in a way that enables them to genuinely assimilate it into knowledge.

To develop a learning culture, make a top-down leadership commitment to learning, model the expected learning behaviors yourself, and implement a learner-led learning approach. When you do, you'll improve client service, increase capacity, enhance team performance, and boost employee satisfaction and retention, too. Begin enhancing your firm's learning culture today!

To learn more about developing or enhancing your firm's learning culture, feel free to contact Jennifer Wilson at jen@convergencecoaching.com.

Practice Perspectives

Developing a Learning Culture in Your Firm

As we discussed in Leadership Lessons, investing in a learning culture in your firm offers many benefits for your team, including motivation, enhancing satisfaction, expanding their knowledge, enhancing performance, and expanding capacity. In this article, we will help you realize these benefits by exploring the steps to developing your firm's learning initiative plan.

Before you can develop a learning plan, you must first assign ownership of your learning functions. Depending on the size of your firm, you may have a "Learning Manager" that drives your firm's learning initiative and develops and manages your learning plan with input and approval from an Executive or Partner Sponsor. Or, if your firm is smaller, the learning owner may also be a partner or owner in your firm.

Establishing Learning Plans

First, the Learning Manager and/or the Executive or Partner Sponsor should **create a Learning Initiative Plan** that gathers input from your leadership team and defines what you intend to accomplish or achieve by investing in a learning culture. Your learning plan should include a mission and several potential objectives, including:

- Transforming behavior
- Enhancing performance
- Expanding capacity by increasing the number of people who can do certain tasks
- Increasing efficiency
- Enhancing employee satisfaction and retention
- Differentiating your firm in the recruiting process

Then your Learning Manager should establish both **short-term and longer range measures** to gauge the effectiveness of your learning plan. Some example short-term measures could be:

- Establishing a written firm-wide learning plan by XX/XX/XX
- Developing individual learning roadmaps for each individual in the firm by XX/XX/XX
- Ensuring that XX team members pass their CPA exam by XX/XX/XX

Some longer term measures might include the number of people promoted in your fiscal year, an increased client satisfaction rating on your next annual survey, and profitability improvement by a certain percentage. To begin, develop two to three measurable goals that support the objectives you and your leadership team have agreed on.

Methods and Types of Learning

The next step is to **identify the types of learning required in your firm**. The Learning Manager should develop a "master overview" of all of your firm's learning options. You can start by customizing our [Organizational Team Learning Matrix](#) template to capture the various learning types in your firm. All learning in the public accounting and IT professions seems to fall under one of four educational categories: **technical skills, soft skills, business model education, and business process topics**. Typically, firms do a pretty good job of ensuring that team members receive the appropriate technical learning required to maintain certification and to stay current on the latest updates in each individual's specialty areas but often do not do as well in ensuring the "softer" skills are intentionally added. Additionally, we often don't plan what each person needs at each level very well.

To help plan and forecast what learning will be required, identify what needs you expect in each of the four learning categories for each staff level or position. You may have some learning that is expected at all levels, such as business writing and ethics, and other skills that are required as people advance in their career, such as people management and specialized technical skills. Input this information into your Organizational Team Learning Matrix and share it with those who mentor or have people management responsibilities to help them guide and plan the training for their people. Doing so will help ensure that each team member receives training on the specific skills and behaviors that they need at the right level in their career progression.

Your Learning Manager should next identify the types of instructional methods available to your team members and include the many options that can appeal to your individual team member's styles and preferences, the timing of your need for the learning, the cost of the material that is covered, and the CPE awarded for it, if

applicable. The most common types of instructional methods include:

- Classroom training
- Seminars and workshops
- Conference attendance
- Web-based facilitated training
- Self-study courses (DVD, online, televised)
- Self-guided reading
- One-on-one training, discussion, and mentoring
- Experiential learning by doing and problem solving

Once you have identified your firm's course content across the four educational categories and organized them by the level at which they are required and the type of instructional method used to convey them, your Organizational Team Learning Matrix will be complete. Then, you're ready to create customized learning opportunities for each individual.

Creating Individual Learning Roadmaps

Ideally, each person in your firm will have a learning roadmap that outlines the "required learning" for them at their current level, in their current role and also what is required for promotion. For instance, to move into a more senior position, you may require that each person first complete their learning roadmap and be able to demonstrate the associated skills, knowledge, and behavior outlined in their learning plan.

Consider creating individual learning roadmaps as part of your annual performance review and/or goal setting process. We have created an example [Individual Learning Roadmap](#) for you to use as a starting point. Your learning roadmaps should be built for each team member based on the individual's level in your firm, prior experience, learning preferences, courses of interest, and specific specialty skills needed. For each learning objective on the individual learning roadmap:

- Identify the **priority**
- Determine the **"by when" date**
- Identify **who will assist** the team member in accomplishing each learning objective
- Define the **method** by which the learning will occur
- Include professional texts, articles, web sites, databases, manuals, and other **resources** that may help them in their learning in each area

The Learning Manager can create an Individual Learning Roadmap template for each of your team members based on their role and learning needs and goals. Then, each team member can customize their own Individual Learning Roadmap with input from the Learning Manager and/or their career manager or mentor. Once approved, the career manager or mentor will then use the learning roadmap to check on the progress of the individual's goals and to assist in scheduling the learning that needs to occur.

Creating individual learning roadmaps can be as simple as identifying two or three skills each person needs to develop and courses or other learning methods that they will participate in to develop those skills in the coming year. **Start simple and identify the learning objectives that will have the biggest impact in developing your people and their learning goals.**

Once you've developed your Learning Initiative Plan, Organizational Team Matrix, and Individual Learning Roadmaps, you are ready to **establish a method for reporting on the progress**. Your Learning Manager and Executive or Partner Sponsor should be held accountable for the success of your learning programs, including accomplishing the short-term and longer range measures that you established in your annual Learning Initiative Plan as outlined at the beginning of this article. In addition, you may consider tracking the completion of each team members' learning roadmap objectives, too.

No matter where you decide to start developing – or enhancing - a learning culture in your firm, choose one thing you can commit to undertake today, implement it, and then choose the next idea or action you can commit to complete. For more information about creating a learning culture, visit the AICPA PCPS Human Capital Center at www.aicpa.org/pcps for additional tools and resources, including a Learning Guide, Action Plan, Learning Tracking by Course Matrix, and information about how to map your learning plans to your firm's competency model. To discuss and brainstorm ideas for deepening your firm's learning culture, contact Tamera Loerzel at

tamera@convergencecoaching.com.

By committing to developing a learning culture, you will reap the rewards of having a **self-directed, development-oriented, and increasingly capable team!**

News News

Need to Develop Leadership Skills in Your Firm?

Plan to attend our **Leadership Development Workshop** in Omaha, Nebraska on Friday, June 12th (and, if you're a baseball fan, attend the College World Series which begins the following day!).

When your leaders, including partners, managers, and firm administrators, attend this 1-day study of **Leadership, Accountability, and Conflict Management** they will gain access to practical information and tools and learn tangible methods to enhance their leadership skills, including:

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

Take advantage of our early bird special pricing of \$300 for registrations received by May 15. Visit www.convergencecoaching.com/omaha.htm for more information and www.convergencelearning.com to register.

If you have questions about the difference this workshop will make in your practice or if you would like to discuss tailored web-based or in-firm training for your firm or association, please contact Krista Remer at krista@convergencecoaching.com or (402) 891-6393.

Service Spotlight: Distance Learning – Training Any Time, Anywhere

We know how hard it is to get away from the office, and the high cost of travel these days can make investing in CPE expensive. At ConvergenceCoaching, we recognize the need to have access to **high-quality, difference-making soft skills** CPE without having to travel. That's why we've developed an online distance learning program that will enable you, and members of your team, to take high-quality courses **anytime from anywhere**.

Our online self-study courses, the first of which are **Maximizing Your Professional Image, Managing Difficult Conversations Successfully**, and **Master the Art of Time Management**, are perfect for firms that want to train everyone on the same courses, in the same way, over time. New employees can easily "catch up" on what others have learned at their convenience - after hours, from home if they choose, and at their own pace.

Our distance learning programs are pending NASBA approval for CPE sponsorship and will "officially launch" once that process is complete. Until then, if you'd like to take one of our courses without CPE or if you're interested in more information on the online programs, which are available individually or in license packages for your firm, contact Lisa Spear at lisa@convergencecoaching.com or (615) 292-9321

Guest Bloggers Wanted!

Our blog, "**Inspired Ideas**" (<http://blog.convergencecoaching.com>), is a great place to share ideas related to CPA and IT practice management – and personal development, too! **Read our blog** to gain insights into issues ranging from business development and motivation to IRS regulations. Then, subscribe **to receive an e-mail notice each week** when we post. Simply enter your e-mail address and click the "Get e-mail updates" link on the right-side panel.

From time to time, we would like to feature blog posts from guest writers who have a message to share with our audience. If you would like to contribute to, or learn more about, **Inspired Ideas**, please contact Michelle Baca at (505) 249-4980 or michelle@convergencecoaching.com.

We welcome your participation and would love to hear your inspired ideas and opinions –whether commenting on our posts or as a guest blogger!

INSIDE Public Accounting's Annual Survey

Many outside elements are affecting the CPA profession today. To help firms uncover unique opportunities, identify challenges, and perhaps even make a change in the overall business model of the profession by sharing valuable information, INSIDE Public Accounting would like to **invite you to participate in their Analysis of Firms Survey**.

There is no cost to participate! Each participating firm will receive:

- A copy of the IPA Top 100 firm rankings, along with the detailed financial and operational analysis of the rankings
- An electronic "Executive Summary" of the 2009 IPA National Benchmarking Report
- Preferred pricing on the final 130+ page IPA National Benchmarking Report
- Preference for selection in articles written by IPA throughout the year – a great opportunity for marketing
- Consideration for inclusion in the IPA Top 100 list, the IPA Best of the Best firms list, and the IPA All-Stars list

Please visit www.plattgroupllc.com/2009survey for more information and to take the survey by the deadline of June 8.

Upcoming Speaking Events

The ConvergenceCoaching team will attend and speak at several events over the next several months, including:

May 20

Houston HR Gulf Coast Symposium

Houston, TX

www.hrhouston.org

Presentation:

> Delivering Effective Performance Feedback

June 1 - 3

BDO Seidman Alliance Conference

Las Vegas, NV

www.regonline.com/AllianceMeeting09

Presentations:

- > Marketing from the Top
- > Marketing Success Stories
- > Four Secrets to being a Successful Rainmaker
- > Social Networking

June 8-9

AICPA Emerging Partner Training Forum

Lake Buena Vista, FL

www.cpa2biz.com/conferences

Presentations:

- > Acting with Ownership & Accountability
- > Conflict Management & Difficult Conversations

June 12

ConvergenceCoaching, LLC Leadership Development Workshop

Omaha, NE

www.convergencelearning.com

Presentation:

> Leadership, Ownership, and Conflict Management

June 16-17

**Association for Accounting Administration
National Practice Management Conference**

Denver, CO

www.cpaadmin.org

Presentations:

> Human Resources Fly-In – Understanding and Managing Diversity

> Conducting Powerful Presentations

We hope to see you at these events and others in the future. Plan your calendars and register today! 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!

To access our catalog with a complete listing of topics for speaking, teaching, and custom in-firm programs and to see updates to our speaking calendar, please visit www.convergencecoaching.com/speakingevents.htm.

Upcoming Web Seminars

The ConvergenceCoaching team offers a complimentary **web seminar series** designed to help you develop “soft” skills in a variety of areas, including leadership, marketing, sales, and human resources. We also provide continuing professional education (CPE) credit for those who would like it for a small administration fee of \$39.

Please watch your e-mail inbox for invitations and plan to join us for our upcoming 75-minute web seminars, which will be held at 11:00 a.m. Eastern Time on the following dates:

- **June 11 - Developing Networking Skills to Build Your Personal Brand**
- **July 14 – *Understanding Diverse Personalities**
- **August 11 - Create a Learning Environment**

**Participants will have the opportunity to take the Myers-Briggs personality assessment in advance of the web seminar to learn their personality type and gain full advantage of the training. Look for more details via e-mail next month, or for more information about Myers-Briggs personality assessments, contact tamera@convergencecoaching.com!*

Client Corner

CC, LLC's New Sections in the AICPA's Human Capital Center

ConvergenceCoaching is pleased to announce the completion of two more sections on the AICPA PCPS (Private Company Practice Section) Human Capital Center, which we were honored to develop. The **Team Development** and **Learning Culture** sections are now available at www.aicpa.org/pcps. Benefits to PCPS members include a step-by-step action plan, tools, articles, and resources for developing a learning culture in your firm and developing and motivating your team members.

AICPA, CPA2Biz, and Intacct Alliance

The American Institute of Certified Public Accountants, CPA2Biz, and Intacct, a technology leader in on-demand financial management and accounting applications, are aligning to co-develop a new version of Intacct for CPAs and their clients that includes unique content from the AICPA.

The alliance is part of CPA2Biz's strategy to help firms transform their client accounting practice and deepen their role as a Trusted Business Advisor.

For more information about how this alliance will improve the productivity of the CPA profession, please visit www.cpa2biz.com/intacct.

Welcome New Clients!

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

Bernstein, Fox, Whitman, Goldman & Baumblatt LLP in Los Angeles,CA

James Moore & Company in Gainesville, FL

Pry Professional Group in Findlay, OH

Quick & McFarlin, P.C. in Omaha, NE

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.

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