



## Wilson's Writings

Everywhere you look, you see and hear about the “graying” of America and the need to succession plan. There is an old adage that consultant and friend Steve Erickson ([www.steveeriksonllc.com](http://www.steveeriksonllc.com)) reminded me of recently: that smart firms treat succession in their practices as a process, not a one-time event. In our travels at ConvergenceCoaching, **we see that almost all firms can benefit by sharpening their succession processes and making succession planning a part of all leaders’ core responsibilities.** That’s why we’ve dedicated this issue of Coaching Concepts to the subject of succession.

In **Leadership Lessons**, we’ll explore some of the reasons firms put off succession discussions and then identify **ten steps you can take to make succession a strategic process in your practice.** Then, in **Practice Perspectives**, we’ll identify the **leadership and partner development programs you should consider to remain competitive and secure your firm’s place in the future.** In **New News**, we’ll share some of the resources and support that we provide to all firms that help in young leader development and the successor selection and transition process – along with important information about upcoming events, profession happenings, and client news.

It can be so uplifting and freeing to know that you are on the path to ensuring continuity and success for your team. **Please don’t put off the subject of succession for another day.**

Enjoy the spring and hope to see you on our travels soon!

Gratefully,

***Jen***

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## Leadership Lessons

### Ten Steps to Make Succession a Strategic Process

***The final test of a leader is that he leaves behind him in other men [and women] the conviction and the will to go on.***

~ ***Walter Lippman***

It is no secret that our nation is graying and the need to plan for the succession of the approximately 76 million Baby Boomers cannot be delayed. **As we’ve worked with firms across the country, though, we’ve discovered that the issue of succession planning is one that most put off, deny, or ignore.** The reasons for this procrastination are varied, but they tend to fall into four categories:

- **Mature partners not wanting to face the aging process or envision possibilities for life without**

**work at the firm.** Leadership then takes their cues from this denial and defers any discussion of succession.

- **Mature partners believing that younger partners or up-and-comers are not yet capable of taking over or running the firm.** Because they fear for the firm's security, these mature partners then hold on to leadership responsibilities and delay the process further.
- **Firms not having clear successors for key positions** and avoiding the inevitable difficult choices and personal politics that choosing a successor will entail.
- **Firms confusing succession planning with the buy/sell process** and, not wanting to engage in discussions of valuation or terms, they put off other elements of succession.

But time marches on and succession is, or will be, thrust upon us all. Not planning, communicating, and preparing will leave your organization vulnerable. In this article, we will explore how to get past these hurdles and make succession a strategic and ongoing process in your firm.

To propel your leadership team into succession discussions, you must first convince them that succession is not event-based or something easily done in haste. **Instead, it can take years to properly plan for the transition of key people, and the time to start is now.** If you are concerned about sensitivity of certain partners to the subject, hire a facilitator and an attorney to break the ice, perhaps play "bad guy," and lead your team through your first discussion.

Then, consider taking these important succession process steps:

1. **Develop a unifying, engaging vision for your firm's future that both the mature and up-and-coming leaders can get enrolled in.** When you do so, you will develop an agreed upon destination you're all driving toward, and this lofty ideal – that will surely include the continuation of the practice – will help motivate your succession discussions. To develop your vision, see our [Leadership Lessons](#) article from our December 2010 issue.
2. **Develop your firm's up-and-coming leaders.** This step is one that must be done every day your firm exists as a core value and cultural commitment. Invest time, money, and resources to train, mentor, and stretch your team members so that they are encouraged to work a level above where they are in terms of client service, technical capacity, administrative responsibility, and people and business development. For more information on this imperative activity, see this issue's [Practice Perspectives](#) article.
3. **Understand your firm's operating agreement.** Make sure you are all aware of the agreement's requirements around retirement age, retirement benefits, buy/sell, and governance changes that may take place based upon age. For key positions like your CEO or Managing Partner, understand any age limitations and the process by which successors are chosen and elected. Also, evaluate the issues of client ownership and be sure that your owner compensation systems don't promote holding onto client ownership instead of actively transitioning it. Consider valuation methods that enable retiring owners to "freeze" their buy-out valuation at the point that active transitioning occurs so that they are not incented to hold on to clients or responsibility to maximize their valuation, either. If your firm does not have these items spelled out in an operating agreement, it is paramount that you iron this out as soon as possible. We have seen firms in very precarious positions when a sudden transition occurs and an agreement is not in place to guide the firm's leadership. Review your buy/sell agreement at least annually and update it regularly as things change in your practice. You may consider engaging a facilitator and an attorney to help you create or refine your agreement.
4. **Get honest about retirement timing for all firm leaders.** We highly recommend that all partners or shareholders declare their intended retirement date annually and that this information is published to the rest of the group. Further, we recommend that when a leader is within three years of their declared date, the date is no longer flexible. For some, this is the hardest discussion, but if you start now and declare annually, people will get used to thinking and communicating in this way and it will become a part of your culture.
5. **Brainstorm with leaders who are over 55 to define their ideal retirement plans.** Discuss their interest in tapering their time commitment and client work and in what timing, whether they want to continue on in some capacity in the firm after retirement, and, if so, what activities they would ideally like to engage in, and when their "completely stop working" date will be. Again, this should be a fluid discussion over time that is cemented in place within three years of the

retirement date.

6. **Define in writing the roles of those who face retirement within three years and begin to prepare the successor for each of their new responsibilities.** Ideally, your firm will have one-size-fits-one role descriptions for each person on your team – not just those retiring. However, it is critical to have a written role definition of the specific duties and responsibilities of those facing retirement within three years, along with an in-depth listing of their client responsibilities, referral sources, association and networking activities, people management responsibilities, and other internal administrative duties. This listing is one of the most put-off activities as it often feels too real for the retiree and too presumptuous for those around them. We recommend that you create a succession team consisting of the retiree, a member of your firm's leadership team who will act as the "wing person" for the retiree, and an administrative person or young manager. This succession team will meet in a series of discussions to map out the details of the things the retiree owns and must transition.
7. **Identify the right successors.** This activity should be an ongoing process but can also be event-based. For your ongoing process, your leadership team should meet regularly to identify the list of promising up-and-comers, or rising stars, in the firm. These rising stars should receive additional focus and resources to develop to their full potential, as discussed in this issue's [Practice Perspectives](#) article. As a retirement event emerges, the succession team identified above will meet to identify successors for each responsibility on the retiree's list. Very often, there are multiple successors to take over portions of the retiree's responsibilities as it is difficult to find a one-to-one skills correlation for the entire scope of their duties. In the event of the retirement of a CEO, Managing Partner, or other key practice leader, the choice of a successor may require a more significant assessment process, evaluating potential successors, gathering input from the partner group and staff, and considering the decision as you would a key hire. The goal of this assessment process would be to find the internal candidate who most closely matches the skills, abilities, and behaviors you need to fill the retiree's position. It may be helpful to engage an outside consultant to assist with the selection of your successor, especially in instances where there are differing views on who should emerge as the new leader. We've had the privilege of doing this work for a number of firms, and the presence of an impartial assessor to guide the process can enhance the team's trust in the outcome.
8. **Plan for the ripple effect.** Most firms forget that the transition of responsibilities from the retiree to a successor almost always causes the successor to transition some of their duties to another person. This ripple is rarely planned for or managed and the "third successor" is often surprised as work starts flowing their way. Steps 6, 7, and 9 apply to all levels of transition – from the retiree to the successor, from the successor to their successor, and so on.
9. **Manage the transition process.** Be sure to manage the transition process as if it were a project plan, with clarity of which items will transition, to whom they will transition, and by-when the transition will occur. Help the retiree to let go of responsibilities gradually, over time, to minimize overwhelm on behalf of both the retiree and the successor. The succession team will then hold regular check in meetings to ensure that your plan is on track and consider financial incentives for those responsible for ensuring transition success, especially the retiree.
10. **Honor your retirees and keep them engaged.** There are many meaningful roles for your most experienced leaders, including providing training to younger staff, engaging in community activities, developing business for the firm, acting as ambassadors with key clients or referral sources, and coaching emerging leaders. Be sure to keep your retirees engaged in your firm's future for as long as is practical and desired by you both. And, invest in the appropriate "send off" to honor their contributions to the firm and show all others in the firm that people are important at all stages of engagement.

Throughout the process don't forget the importance of communication. Include your team by sharing your plans and updating them regularly on the progress you make against it. And, when the time comes, a clear communications strategy and transition plan will need to be in place so each team member understands how any changes will affect them.

**Succession planning is critical to your firm's continued success. Take the time to proactively plan for your future and ensure a win-win for everyone involved!**

For more information about creating your firm's succession plan, contact Jennifer Wilson at

## Practice Perspectives

### You Need Capable Successors for a Seamless Transition

As Vince Lombardi said, *“Contrary to the opinion of many people, leaders are not born. Leaders are made, and they are made by effort and hard work.”*

To experience a seamless transition as your leaders grow up, and then eventually out of your organization, identifying and developing your up-and-comers must become a core competence. Without these critical abilities, there won't be anyone to carry out the vision of your firm, serve your clients, or pay your retirement benefits and/or buyout. In this edition of **Practice Perspectives**, we'll share ideas for developing leaders in your firm, identifying your partner potentials, and preparing them to step in and lead when the time comes.

**The first step is to make a cultural commitment to develop leadership skills in your people.** Some firms offer a leadership development program (LDP) that allows people at various levels and in different roles, including administrators, to enroll in the program to enhance their ability to lead.

Your firm's leadership development program could include training in skills that all levels and roles can benefit from including:

- Enhancing your professional image
- Developing a personal code of conduct
- Business etiquette
- Time management
- Communications including business writing
- Delegation and ownership
- Creating a culture of accountability
- Managing conflict

Some leadership development programs also include course work in personnel management, delivering feedback, networking, business development, and practice economics. Your firm will be more competitive in recruiting, retention, and succession if your people have access to education in these important areas.

The next step to developing your firm's successors is to **develop a specific process and program for identifying and then mentoring your partner potentials as discussed in step seven in Leadership Lessons**. You can use our [Partner Candidate Criteria](#) template as an example. Ask your partners to rank your up-and-coming team members against these attributes and competencies and then schedule a partner meeting to review them. From there, you can determine who your partner potentials are, make mentor assignments to partners or other great role models who will work with these candidates, and meet regularly to review and discuss their progress.

Once you identify your partner potentials, consider providing them with a personalized path-to-partner coaching and development program. The place to start is to assess their strengths, weaknesses, unique challenges and opportunities, personality preferences, and other attributes, providing a level of personal and professional insight that is not usually afforded staff in standard performance reviews. Ways that we've helped firms with these program elements include:

- **Having the partner potential, their managers, subordinates, and peers complete a SWOT analysis and Leadership Attributes Evaluation (available in our Leadership Toolset at [www.convergencelearning.com](http://www.convergencelearning.com))** and comparing the responses to identify the consistent themes and gaps between the partner potential's perception of themselves and how others see them. These insights can be invaluable and will highlight the areas to focus on for growth.
- **Conducting a survey assessment** to explore the partner candidate's vision for their career and the firm and exploring the things they feel they can do or change to contribute most to the firm.
- **Administering the Myers-Briggs and/or DISC personality assessment** to explore preferences in communication, data gathering, decision making, teamwork, planning, and organization.

By conducting these assessments, you'll get to the essence of the individual's potential and understand their natural abilities, what makes them "tick," and the most critical areas to focus on in your coaching and development program. From there, you'll construct a development plan that allows them to pursue education, coaching, and job shadowing to improve their skills and behavior in the areas that are most important to fulfilling their future leadership duties.

**In addition, consider providing more transparency for your partner potentials so they can learn what it means to be a partner and what it takes to be an owner in your firm.** Teach the economics of your firm by sharing financial information, allowing them to participate in the strategic planning and budgeting processes, and educating them on the metrics that are important to your leadership team. Allow your partner potentials to participate in partner meetings (excusing them for comp discussions or other sensitive matters as needed). When you engage your partner potentials in these activities, you will deepen their education and also gain a means to gauge their aptitude and character as a member of your partner group.

As you commit to leadership development as a core competence of your firm, be sure to communicate your leadership development and partner potential programs to your entire team, including your vision for them, the benefit to your team members and to the firm, and how team members can become eligible to participate in either or both. Be sure to let team members know who to go to for questions or express interest in leadership development for themselves.

To ensure the future of your firm, you have to have the right people with the right skills ready to step in and replace your transitioning partners. And, because life has a way of throwing us curve balls, **you may need your future leaders to be ready sooner than you planned— so it's best to be prepared.**

For additional information about developing your up-and-coming leaders and creating a leadership development program and/or partner potential program, contact Tamera Loerzel at [tamera@convergencecoaching.com](mailto:tamera@convergencecoaching.com) or (952) 226-1780.

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## **New News**

### ***ConvergenceCoaching, LLC Turns 11!***

**On April 1, 2011, ConvergenceCoaching, LLC celebrated our eleventh anniversary of helping leaders achieve success!** We are so grateful to each of our friends and colleagues with whom we have worked over these years. We would not be where we are today without your trust and friendship! **Here is to many, many more anniversaries and to continuing the transformational work we love!**

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### ***Service Spotlight: Our New Human Resources Retention and Recruiting Toolsets!***

Our people are our greatest assets and are truly the lynchpin to our success.

So, what are you doing to engage your team members to ensure that they are motivated and "locked in" at your firm? And, how prepared are you for the economic recovery, when it is very likely that the profession will see significant turnover and talent shortages (again). Have you restarted your recruiting engines, including positioning your firm for success using new mediums such as online social media recruiting?

Our **Human Resources Retention and Recruiting Toolsets** will provide you with **over 90 valuable templates, tools, articles, and resources** designed to support you as you **enhance your firm's people engagement, development, and recruiting programs.**

You can order your toolsets individually for an introductory price of \$129 for the Human Resources Retention Toolset, \$129 for the Human Resources Recruiting Toolset, or you can purchase both for only \$199. Watch your e-mail for the availability of the HR toolsets later this month or **visit [www.convergencelearning.com](http://www.convergencelearning.com)** to check availability and purchase the toolsets.

While you are there, be sure to consider our other toolsets, including our Leadership and Communications Toolset, which has resources to support succession planning for your firm, among many other tools designed to help you enhance your leadership skills and develop leadership skills in others.

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### ***Retreats to Create Partner Unity and Training to Develop Your Team***

**If you are planning your firm's annual retreat or strategic planning meeting and want to gain *unity, transparency, accountability, and an action plan* that is truly implemented out of your meeting, consider a **ConvergenceCoaching** facilitator!** If succession is a top priority for your firm, we can help you gain unity as a group at any stage in your process from identifying and assessing successor candidates to creating and implementing your succession plan.

Our expertise includes:

- **Partner unity, trust, performance, accountability, and teamwork Governance and compensation Revenue growth Succession planning and leadership development Team performance and accountability Marketing, sales, and social media program development Employee engagement, motivation, and recruiting**
- **Leadership development, people development, and management issues**

We also offer **customized training** for **partners, managers, firm administrators, and/or staff** on subjects such as leadership, communications, HR, and practice development to help you **develop your team and secure your firm's future.**

Contact Lisa Spear at [lisa@convergencecoaching.com](mailto:lisa@convergencecoaching.com) for more information about how we can help you gain unity, work toward your vision, and develop your team.

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### ***ConvergenceCoaching in the News!***

Congratulations to our partner and co-founder, **Jennifer Wilson**, who was included as one of **The CPA Technology Advisor's Top 25 Thought Leaders in public accounting for 2011!** Click [here](#) to learn more.

In addition, we are regularly **featured authors and sources for various industry publications.** Find us in **INSIDE Public Accounting**, the AICPA's **CPA Insider**, Texas Society of CPAs **TSCPA Public Practice E-News**, **Accounting Today/Accounting Tomorrow**, and as a frequent guest blogger on the **SpeedTax Blog** and **Toolbox for Finance**.

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### ***Is Your Accounting Firm One of the Best to Work For? Take Accounting Today's 2011 assessment and find out!***

*Accounting Today's* fourth-annual "**Best Accounting Firms to Work For**" ranking is dedicated to identifying and recognizing the best employers in the tax and accounting profession. This ranking is recognized as a great honor for firms and a significant competitive advantage for organizations that make the list.

If you are part of a public or privately held U.S. accounting firm with a minimum of 15 employees, go to [www.bestaccountingfirmstoworkfor.com](http://www.bestaccountingfirmstoworkfor.com) and register to participate in the assessment process. Participants will be given a **free employer benchmarking summary report with the ranking for your workplace and other participants.**

**Don't miss the deadline of June 30. Register to participate today!**

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### ***How Does Your Firm Stack Up? Take the 2011 INSIDE Public Accounting and Rosenberg MAP Surveys!***

**INSIDE Public Accounting's Annual Benchmarking Survey** and **The Rosenberg MAP Survey** are excellent ways to benchmark your firm's key metrics against your peers and compare management policies, financial results, and other key practice measures.

By participating in the surveys, you will receive a number of benefits and useful information, including the comprehensive result reports with benchmarking data that will allow you to evaluate how your firm compares to others in your geography and with other firms your size.

**Take the INSIDE Public Accounting Survey by clicking [here](#) by the June 10 deadline.**

And, complete **The Rosenberg Survey** online at [www.RosenbergSurvey.com](http://www.RosenbergSurvey.com) by the June 15 deadline.

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### **Connect With Us Online**

**At ConvergenceCoaching, we believe that social media technologies are transforming the way we communicate, and we want to connect with you!**

Connect with our team members on **LinkedIn**:

- [www.linkedin.com/in/amydenman](http://www.linkedin.com/in/amydenman)
- [www.linkedin.com/in/jackleecpa](http://www.linkedin.com/in/jackleecpa)
- [www.linkedin.com/in/jenniferwilsonprofile](http://www.linkedin.com/in/jenniferwilsonprofile)
- [www.linkedin.com/in/kristaremer](http://www.linkedin.com/in/kristaremer)
- [www.linkedin.com/in/lisaspear](http://www.linkedin.com/in/lisaspear)
- [www.linkedin.com/in/michellebacaprofile](http://www.linkedin.com/in/michellebacaprofile)
- [www.linkedin.com/in/ruthleerichter](http://www.linkedin.com/in/ruthleerichter)
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- [www.linkedin.com/in/tameraloerzel](http://www.linkedin.com/in/tameraloerzel)

Follow Jennifer Wilson's "tweets" on **Twitter**: <http://twitter.com/JenLeeWilson>.

Please become a fan of our firm's **Facebook** page: [www.facebook.com/convergencecoaching](http://www.facebook.com/convergencecoaching).

And, don't forget to **read and subscribe to our blog, "Inspired Ideas"** at <http://blog.convergencecoaching.com>.

If you would like to contribute to **Inspired Ideas** as a **guest blogger** or learn more about blogging, social networking venues, or **how we can help you create and implement a social media strategy for your firm**, please contact Jack Lee at 262.618.4291 or [jack@convergencecoaching.com](mailto:jack@convergencecoaching.com).

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### **Upcoming Speaking Events!**

**May 17**

**AGN North American Regional Meeting**

Scottsdale, AZ

[www.agn-na.org](http://www.agn-na.org)

**Presentation:**

> Enhancing Performance & Accountability in Your Firm

**May 18**

**CPA Leadership Institute Webinar**

Online

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

**Presentation:**

> I Trust You (Sort Of) Do You Trust Me?

**May 19**

**Association for Accounting Marketing Webinar**

Online

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

**Presentation:**

> Talking Straight to Drive Change

**May 24**

**CPA Leadership Institute Webinar**

Online

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

**Presentation:**

- > Conducting Powerful Presentations

**June 1-2**

**ConvergenceCoaching Leadership Development Program (BDO Alliance Members)**

Fairfield, NJ

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

**Presentation:**

- > Leadership Fundamentals, Planning for Success and Communication Skills

**June 2 - 3**

**Washington Society of CPAs Emerging Leaders & Women's Summit**

Bellevue, WA

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

**Presentations:**

- > Women as Powerful Leaders & Communicators
- > Four Secrets for Developing Your Sphere of Influence
- > Developing Business/Keys to Lasting Career Satisfaction and Success

**June 4**

**MSI Global Americas Regional Meeting**

Cleveland, OH

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

**Presentation:**

- > Achieving Growth through Partner Accountability

**June 7**

**Association for Accounting Marketing (AAM) Summit**

Chicago, IL

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

**Presentation:**

- > Enhancing Performance & Accountability in Your Firm

**June 7**

**CPA Leadership Institute Webinar**

Online

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

**Presentation:**

- > CPA Firm Success Metrics: Understanding Practice Economics

**June 14**

**AICPA Practitioners/Tech+ Conference**

Las Vegas, NV

[www.cpa2biz.com](http://www.cpa2biz.com)

**Presentations:**

- > Managing Difficult Conversations Successfully
  - > Overcoming the Seven Deadly Sins of Delegation
- To receive \$100 off your registration, use code TAC!***

**June 14**

**Leading Edge Alliance A&A Practice Leaders Conference**

Chicago, IL

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

**Presentations:**

- > The Top 10 Reasons Clients Leave
- > Exploring One of the Top Five Growth Drivers: Trends in Marketing and Selling

**June 21 - 22**

**AAA 2011 National Practice Management Conference**

Louisville, KY

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

**Presentations:**



- > HR Fly-In: Elevating the Role of HR
- > Managing Millennials

### June 22

#### PKF Emerging Leaders Program

Lawrenceville, GA

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

#### Presentation:

- > Trust: Developing It, Maintaining It and Repairing It

### July 7

#### CPA Leadership Institute Webinar

Online

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

#### Presentation:

- > Helping People Overcome their Personal Pitfalls

### July 14 – 15

#### Upstream Academy Headwaters Conference

Denver, CO

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

#### Presentations:

- > Enhancing Partner Performance and Accountability in Your Firm
- > Effectively Using Technology to Help the Firm Grow
- > Small Group Discussion

### July 20 - 21

#### ConvergenceCoaching Leadership Development Program (BDO Alliance Members)

Newport Beach, CA

[Registration Site for BDO Alliance Members](#)

#### Presentation:

- > Developing Your Sphere of Influence and Business Development Strategies

### July 21

#### CPA Leadership Institute Webinar

Online

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

#### Presentation:

- > Being a Leader Regardless of Your Role

### August 16

#### CPA Leadership Institute Webinar

Online

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

#### Presentation:

- > How to Make a Niche Work for Your Firm

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 speaking events beyond September 1 along with updates to our speaking calendar, please visit [www.convergencecoaching.com/speakingevents.htm](http://www.convergencecoaching.com/speakingevents.htm).

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### *Upcoming Web Seminars*

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

Our upcoming four-part **web seminar series** will explore the elements of our **partner performance and accountability model** to identify areas where you can improve performance – both personally, within your

partner team, and in your firm.

Join us for one or all of our upcoming **Partner Performance and Accountability Web Seminar Series**. These 75-minute web seminars will be held at 11:00 a.m. Eastern Time on the following dates:

- **June 7 - Setting Partner Expectations and Reporting to Drive Performance and Accountability**
- **July 26 - Driving Partner Performance and Accountability with Feedback and Straight Talk**
- **August 16 - Reward Partner Performance and Contribution**

Each course is \$39 per person including CPE credit. Go to [www.convergencelearning.com](http://www.convergencelearning.com) to review agendas and to register.

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### ***Client Corner***

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

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

**Green Haddon Janks** in Los Angeles, CA  
**Kern, Dewenter, Viere LTD** in Minneapolis, MN  
**Mississippi Society of CPAs** in Ridgeland, MS  
**MSI Global Alliance** in London, England, UK  
**Stewart, Archibald & Barney, LLP** in Las Vegas, NV  
**VetImaging** in Irvine, CA  
**Washington Society of CPAs** in Bellevue, WA  
**Wertz & Company** in Irvine, CA

We are grateful 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!

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### ***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](mailto:info@convergencecoaching.com).