CoachingConcepts | The newsletter of ConvergenceCoaching

Strategically Driving Actionable Change

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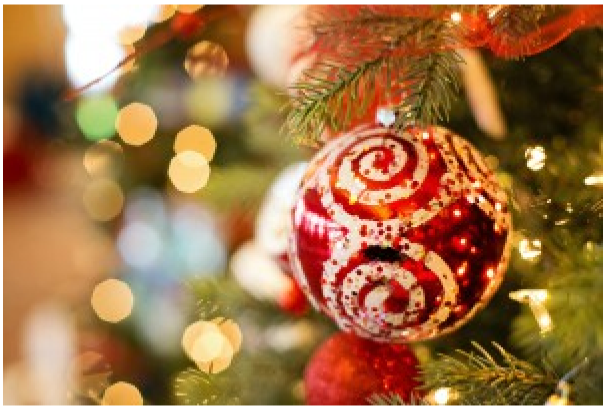
It's the Most Wonderful Time!



We are ending such a great year of transformation and change in our profession, within our clients and in our organization. **We are so grateful for our many blessings!**

I am writing this from a flight home from Las Vegas, where my dear friends and colleagues from Convergence and I were teaching 25 of the profession's brightest about people and business development. This year, firm succession enabled us to fill two of our Transformational Leadership Programs and a host of custom, in-firm programs and it's been a whirlwind! **Guiding future leaders as they dream of new ways to lead and manage firms has been the most fulfilling work.**

The significant changes we see – and cause – can be so inspiring when managed well. But managing change isn't an innate skill and many firms are struggling to drive positivity amidst transition, integration and growth. **That's why we're dedicating this issue of CoachingConcepts to the subject of managing change**. In our **Leadership Lessons** article, we'll explore the importance of having a change management strategy each and every time you make a significant new announcement and how to appeal to various change acceptance profiles. In **Practice Perspectives**, we'll discuss the critical role that communication plays in driving change and we'll share a communications planning template you can use with your team.

As we prepare to close our business for our **customary holiday break**, we're reminded of the privilege of the work we've been called to do. We are in awe of the trust, love and friendship that is shared so freely with us and give thanks for our relationship with you.

Peace and joy to you this holiday season and blessings for a bright New Year filled with possibilities for growth and change!
Gratefully,
Jen

P.S. Be sure to **check out our holiday video** featuring greetings from our team!

Change is everywhere!Manage It Strategically and Drive More Willing Adoption

As leaders, **we're faced with managing ever-accelerating changes** in standards, technology, mobility, succession, transition, consolidation, the global economy, cultural values, the rise of the Millennial and more.

To manage change successfully, we must design, execute, and communicate our change strategy with the same focus and intent that we spend dreaming up our change. If we don't invest the time to plan and communicate carefully, we risk it failing.

Successfully effecting change requires that leaders:

- Develop a change strategy and communications plan
- Execute the change communications and begin implementing their change
- Adopt the change themselves personally
- Acknowledge those who are making the change and encourage those who are not
- Assess progress and identify changes needed to effect this and future changes

In this article, we will discuss change strategy and planning and identify important change motivators you can use to help drive change. In our **Practice Perspectives** article, we'll explore change communications and learn how to develop and execute a change communications plan.

Developing Your Change Strategy

As a leader, you must work with your leadership team to develop a clear and unified change strategy. Ideally, **you will meet to discuss and document your answers to these what, why, who, when, and how questions of change**:

- What change are we planning to make?
- Why is the change occurring? What has led us to this change? What benefits will the change produce?
- What new behaviors or actions does the change require?
- What steps should those affected by the change expect to take (and when)?
- What is not expected to change?
- Who is affected and how so? Who is leading the change?
- Who will be told of the change, when and how?
- When and how will the change be implemented?
- Which people, systems, processes, procedures, or other management structures will change, how will they change, and when will that change occur for each?

Your intention or motive behind any change can truly make or break change acceptance. To effectively drive change, consider these five change motivators originally identified by Everett Rogers, a technology change management expert who coined the term “early adopter.” People are more likely to change when they:

- **Believe they will personally benefit or gain an advantage from the change**. To help others accept change, answer their unspoken question: “When I change, what will I gain or what’s in it for me?” For instance, when a midsize firm merges with a larger, regional firm, each firm’s people must believe that the change (the merger) will benefit them. Potential benefits might include being able to compete for larger engagements because of the more recognized brand or expanded technical abilities of the larger, combined firm, accessing better benefits, or having more confidence in the combined firm’s ability to pay expected retirement payouts.
- **Compare the change to the way it is now and see similarities**. To agree to change, people want to see something they are familiar with. For example, when a firm relocates to another part of the city, leaders should compare the staff commutes to the new office with the old office commutes and then be prepared to communicate the differences and similarities to the staff and proactively address any disappointments from those whose commutes would be lengthened.
- **Understand the change**. People are willing to accept change when it is explained in simple terms or broken into smaller steps that can be more easily understood. The more complex a change, the more critical it is for you to break it down. For example, when your firm moves to completely digital deliverables for client (no paper), the initial change can be hard for clients to understand. Break down any expected actions the client needs to take into steps like logging

onto the digital delivery system (portal). Discuss one action at a time with the client to minimize overwhelm and inaction.

- **Test the change themselves**. Form a pilot test group to allow a smaller group to test the change before asking a broader group to do so. This allows issues and concerns to be identified and handled, easing the way for those less comfortable with change. When you roll out your change using a pilot program, you allow those affected to feel that they can still have input on the change. This also allows you to roll out the change without the expectation of perfection, which allows for more flexibility and positivity when you experience bumps along the way. For example, when a firm implements a new outsource CFO/controllership service, it would be ideal to identify a small number of team members to be the first group selling and delivering the service—and selecting one or two clients with whom to test the service. This allows your firm to engage a small number of team members to learn "on the job" to save a lot of learning (and potential headaches) when you're ready for the larger rollout.

- **Learn of others who have successfully made the change**. Hearing the stories of people or firms that have already made the change successfully can provide confidence to those uncertain about the change. For example, when asking a group of firm leaders to move away from mandatory work periods during busy season, sharing case studies or articles or referring to other groups that have successfully made this change can help those affected feel more confident in the change being proposed.

As cultural anthropologist Margaret Mead said, "Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has." Change almost always starts with a small group of well-meaning leaders who must then enroll others in their ideas. When you have a strategic change to unveil, first take the time to craft your strategy and identify which of Everett's change motivators you'll use as appeals. When you do, you'll be far more effective at engaging others in your ideas and driving real change.

What big change will you have to drive in 2016? What's your strategy for it? If you would like to explore how ConvergenceCoaching can help your leadership team be more effective in managing and communicating change, contact Jennifer Wilson at jen@convergencecoaching.com or 402-933-2900.

Plan Your Change Communications and Drive Adoption

As leaders, it's our job to help others to understand change, accept it and adapt to it. Whether it be a merger, the closing of an office, the start-up of a new service line, the addition of a new industry, the naming of a new CEO, the loss of a key staff person, the implementation of a new time and billing solution or any other type of change, the faster we can facilitate the change acceptance process, the more nimble and competitive we'll be. **If you want to lead people in your firm or group to change, your communications about the change have to answer the questions on their minds.**

In this **Practice Perspectives** article, we'll explore a communication strategy to help your leadership team plan and communicate the message at the right time for each key stakeholder to inspire change adoption in your firm.

Develop a Communication Plan

In our experience, most leadership teams spend time deliberating about and defining the change they want, but spend almost no time planning their communications to support change adoption. Then, they're disappointed with their adoption rates and frustrated by what feels like a lack of compliance. Managing change and driving (swift) adoption requires time to plan your overall communication strategy and message.

When contemplating your change communication plan, be sure to identify and include the following elements: your key messaging and positioning about the change, the timing and specific messages for key stakeholders, and the method and frequency of communication. You can leverage our **Communication Planning Form**, which can be accessed by clicking **here**, which will help guide your leadership team through each of these important aspects of your change communications plan.

The first step in change communications is to define your messaging so that you can unify your leadership team around it. Identify what is changing and why the change is important. **Consider the benefits – or the expected results or outcomes – that can be expected from the change. It's important to consider what objections you may get, too, so that your leadership team can be prepared to address them in a consistent fashion**.

Then, determine which key stakeholders are affected by the change and the key messages and timing to communicate with each. In most cases, you need to communicate change swiftly so the "cascade of communications" occurs over a short timeframe so that firm leadership is able to deliver the messages to the stakeholders directly. For example, if a key leader leaves or your firm experiences a crisis, the leadership team will need to huddle to make a plan to address the change and then swiftly tell the leadership team of the firm, then the staff members, then clients and other stakeholders as the information will likely impact people quickly – not allowing for much time before the various stakeholders "leak" the information to others. Other changes can be rolled out over a longer time period, such as a small acquisition, where the communication can start with leadership groups, those involved in due diligence and then as the acquisition date draws closer communications with entire the team, clients and press will likely require back-to-back communications.

The method or communication vehicle also needs to be considered. As you think through the timing of your communications, consider the best communication method for each stakeholder. **People "listen" differently, so you should consider a multi-facetted platform to communicate your change orally in group meetings, in one-on-one conversations and in writing through email announcements or newsletter updates**. Keep in mind that you will need to communicate about the change frequently and via multiple methods.

The owner of your change communication plan should update it regularly and share it with your leadership team throughout the change process. As new information emerges, capture it in your communications plan. And, create a frequently asked questions document to address questions and objections as they are raised.

Identify Frequently Asked Questions

We recommend that you identify and capture the frequently asked questions that each key stakeholder group might ask so that your leadership team can develop answers to each. **This written frequently asked questions (FAQ) document will provide consistent answers that your leadership can use in their messaging about the upcoming change**.

It's helpful to consider the drivers of change identified by Everett Rogers' and noted in **Leadership Lessons** to help you build your FAQ document. Some questions to answer for most changes include:

- Why are we undertaking this change? What will be better (for me, our firm, our clients) as a result of this change? Why is this change necessary?
- How does life after the change compare to life before the change? What will be the same? What will be different?
- What's the simplest path to adopt this change? What are the first steps? What exactly do you want me to change?
- How can I try out this change?
- What role will each person play in making the change happen – from being informed to actively participating in committees, process changes or other requirements we identify?
- Who else (another person or entity like me or us) has experienced this change? What were their results?
- How will we receive updates about the change and how frequently? How will we know that the change is complete?
- Who do I communicate with regarding the change process? Who can I seek support from?

Inconsistent answers from leaders is a sure-fire way to derail your change. Your team members will feel more secure – and trusting of their leadership team to powerfully lead them through uncertainty, new ways of doing business and new initiatives – when the leadership team is unified in both their communication and actions related to the change. If your team forms and communicates real answers in a written and published FAQ document, you'll be surprised by how much more smoothly and quickly change adoption will occur.

Ensure Success

In addition to a communications strategy that includes multiple oral and written communications about the change, check in with individuals to see how they are adapting to the change, let them share feedback or suggestions they might have, and give them an opportunity to express their concerns or apprehension, especially if they are someone who is slow to adopt change.

Remember that everyone embraces change differently. We all approach and welcome change at a different pace, with some of us up for change, or even instigating change, because we like the variety, challenge and new opportunities change brings. Some people aren't so eager for change to occur; they are comfortable with their predictable schedules and familiar processes. You have people on your team (and in your circle of family and friends) who are likely on both ends of the spectrum and somewhere in between. You can enroll those who like – or at least readily embrace – change to lead the way for others who may need someone else to "test the waters" and tell them it's ok.

Be sure to include and listen to those who are more cautious as you plan your change communications, because they will have some good questions and "what ifs" to consider as you execute and communicate change. Their hesitation will highlight things that are better to think through in advance rather than when the issues become a problem.

When you embrace different change preferences, you communicate change strategically and employ FAQs for your most important changes, you'll find that you'll help people embrace change more quickly, and they'll remember your care and concern about them through the change – and be more willing to go through change with you in the future!

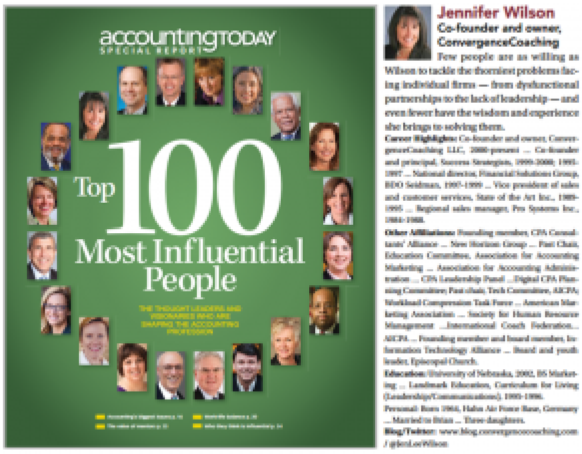
How is your leadership team doing communicating change in your firm? If you would like to explore how ConvergenceCoaching can help your leadership team be more effective in communicating change, contact Tamera Loerzel at 952.226.1780 or tamera@convergencecoaching.com.

ConvergenceCoaching To Close During Our Annual Holiday Break

As many of you know, we close our offices each year between the Christmas and New Year's holidays to provide our team members a well-deserved break. This year, we will be closed from 12/24/15 – 1/3/16, returning to work on Monday, January 4, 2016. Team members may be checking email periodically during this time, but in the event of an emergency, please contact our main office number at (402) 933-2900. A member of our team will be checking this voice mailbox on December 28, 29, 30 and 31.

We appreciate your support of our team holiday and hope that you make some time for for rest, relaxation and fun this holiday season, too. Cheers to a bright year ahead!

Top 100, Top Thought Leader, Most Powerful Women and Most Recommended Consultants for 2015!



Congratulations to co-founder and partner, Jennifer Wilson, for being recognized as one of Accounting Today's 2015 **[Top 100 Most Influential People in Accounting, marking]** 13 consecutive years of receiving this honor.

Jennifer was also recognized this fall on CPA Practice Advisor's list of **[2015 Most Powerful Women]** and by INSIDE Public Accounting on their list of **[2015 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.

The Results Are In From Our 2015 Anytime, Anywhere Work Survey!

We launched our 2nd Annual Anytime, Anywhere Work Survey to continue studying the adoption of flexibility programs in CPA firms. We were thrilled to receive a 57% increase in the number of firms who responded – with 155 participating firms. Similar to last year, we have published a variety of posts on the findings from our survey and you can read them here:

- ***Our 2015 Anytime, Anywhere Survey Results Are In! Firms Continue to Move Away From Time and Place***
- ***Technology Makes Flexibility Work***
- ***Why Offer Anytime, Anywhere Work?***
- ***Sage Advice Regarding Anytime, Anywhere Work – Just Do It!***
- ***Getting the Most Out of Your AnyWHERE Work Programs***

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

- 97% of firms offer flexible work arrangements

- 92% of firms offer a work-from-home program
- 36% of firms no longer mandate Saturday work during busy season
- 43% of firms have implemented performance measures for staff that are not based on time
- 45% of firms employ remote workers in another geography not tied to a specific office

What is your firm doing to increase flexibility at your office? We're always interested in learning about the benefits and challenges firms have experienced in their respective programs. If you have advice to share or questions to ask, email **Renee Moelders**. In addition, if your firm is interested in increasing flexibility and seeking assistance in implementation, contact Renee to see if ConvergenceCoaching might be able to help.

*If you would like to receive the 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.*

Service Spotlight: Human Resources Toolsets

In addition to managing and communicating our organizational change, we should also focus on changes we can make to our HR programs – given much of the change we face revolves around our people! Whether it's helping our people "get better" by improving and growing each year or ensuring we're attracting, engaging and retaining high potentials, successful firms create a winning team filled with team members who want to improve their game.

If you are looking for fresh ideas on how your organization can improve your recruiting, engagement and learning programs in 2016, you could benefit from our three ConvergenceCoaching Human Resources toolsets. Each toolset includes a wide range of tools, templates and articles related to a specific HR topic and is designed to guide your team to identify opportunities to improve and grow.

Recruiting – contains 44 tools and 7 articles to help you refine or establish your firm's recruiting programs and processes to increase your success of finding and attracting the right talent for your firm. This toolset includes two sections to help you add talent and grow your firm:

- Position Descriptions
- Recruiting Tools

Employee Engagement and Retention – contains 11 tools and 24 articles that you can leverage to help motivate and energize your team and develop your overall engagement and retention strategies. This toolset contains resources to assist in two distinct functions:

- Motivational Programs
- Strategy and Communications

Performance Management and Learning – contains 31 tools and 21 articles that you can leverage to develop and train your team and enhance your overall learning and development strategies. This toolset contains resources to assist in two distinct functions:

- Performance Management
- Learning and Training Plans

Embrace change and accelerate your firm's HR "get better" path in 2016 with ConvergenceCoaching Human Resources toolsets! More information is available at **www.convergencelearning.com**.

Client Corner

Accounting Today Best Firms to Work For
We truly admire our clients that were honored as one of Accounting Today's 2015 **Best Accounting Firms to Work For** based on a two-part survey evaluating workplace policies and practices and anonymous employee feedback: **Barfield, Murphy, Shank & Smith, Burr Pilger Mayer Inc., Clark Nuber, Ennis, Pellum & Associates CPAs, Gelman, Rosenberg & Freedman, Johanson & Yau Accountancy Corp., Peterson Sullivan LLP, PKF Texas, Smith Leonard PLLC, Travis Wolff LLP, VSH CPAs, Wilkin & Guttenplan PC and Williams Benator & Libby.** Congratulations!

Accounting Today Top 100 VARs

Congratulations are also in order to our friends and clients that were named to Accounting Today's 2015 **Top 100 VAR** list including: **Arxis Technology Inc., Eide Bailly and Central Consulting Group. Congratulations to your teams!**

Welcome New Clients!
The ConvergenceCoaching team welcomes our new clients to the ConvergenceCoaching circle of friends! Warmest welcome to:
Anastasi Moore & Martin, PLLC in Spokane, WA
Central Consulting Group in Minneapolis, MN
Hall Albright Garrison & Associates in Huntsville, AL
Hill, Barth & King LLC in Canfield, OH
Honkamp Krueger & Co., P.C. in Dubuque, IA
Janney Montgomery Scott LLC in Mt Laurel, NJ
Leaf & Cole, LLP in San Diego, CA
O'Connor & Drew, P.C. in Braintree, MA
Presley & Partners, Inc. in Courtenay, BC
WeiserMazars LLP in New York, NY

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

Upcoming Web Seminars

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

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

- **January 12 – A Healthier, Happier You During Busy Season**
- **January 28 – Navigating Challenging Clients**

Go to **www.convergencelearning.com** to review the agendas and to register. You can also purchase the recording for any web seminar you've missed for just $39 at **www.convergencecoaching.com/news-and-events/recorded-webinars**.

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**.