CoachingConcepts | The newsletter of ConvergenceCoaching

Retain Your People With Anytime, Anywhere Work

Issue 36 | Spring 2016

Hello from the road!

We're at the height of our spring travel season, planning with firms, coaching future leaders, and exploring new ideas with audiences. What a blessed life we lead!

Thank God for our completely virtual, completely flexible model, because while we're working our heads off, we're also managing to fit in a lot of great family time, too. For my family, that means transition time – with my youngest headed to middle school and my oldest graduating high school, I've been working hard not to miss any of the "good stuff" this spring while also staying on top of my work – "having it all" which is a mantra for most of us who work flexibly.

That's why I'm super excited about this spring's newsletter topic – **Anytime, Anywhere Work and the U.S. movement toward truly unfettered flexibility**. We have seen some awesome progress in firms moving to more flexible cultures and expanding flex benefits. **We are hoping this newsletter will inspire your firm to do the same**. In **Leadership Lessons**, we'll explore the long list of possible flex program options so you can identify those you haven't tackled and consider implementing a new option this year. In our **Practice Perspectives** article, we'll look more closely at a newly emerging flex initiative "Unlimited Paid Time Off" – a seemingly scary, but very attractive option that we're seeing progressive firms make happen.

When I think about the many objections we hear from mostly maturing leaders when we teach workplace flexibility, I'm reminded of one of my favorite quotes on the power of intention attributed to the late great thought leader, Jim Rohn:

"If you really want to do something, you'll find a way. If you don't, you'll find an excuse."

Flexibility is no longer a nice-to-have option in the war for talent. Please don't let yourself or your firm off the hook. Further your flexibility programs this year. And let us know how we can help. We're living it!

Gratefully,

Jen

P.S. Don't miss this issue's **New News** and the opportunity to share your firm's flexibility practices in our **2016 Anytime, Anywhere Work survey**, which closes June 15.

Flex Is Not An Option Anymore!

The adoption of flexible work initiatives within public accounting firms is on the rise; however, some firms are still wondering whether they can provide a truly flexible work environment. Others are committed to do so, but wonder what changes they have to make. Progressive firms know that flex programs are a must for attracting – and retaining – top talent and they're taking steps toward a truly flexible culture. **In this Leadership Lessons, we'll explore the types of flex programs to drive your firm's flex culture and we'll supply ideas to help you begin or further your programs**. In our **Practice Perspectives** article, we will go deep into one aspect of flex, Unlimited Paid Time Off and explore ways to implement this advanced flexibility idea in your firm.

Flex in Both Time and Place

A truly flexible work environment provides team members more control over when (the time) and where (the place) they get their work done. In this article, we'll explore ways to provide more flexibility in both areas to expand your flex programs.

Before we begin, let's agree that **flexible work programs do NOT necessarily mean less time or reduced output**. While there are three flex options that do involve a reduced-hours schedule: part-time, zero overtime, and reduced hours during non-peak periods (seasonal work arrangements), most flex options involve a difference in when work takes place, not a reduction in effort or results. **Some examples of full-production flex programs firms can implement include**:

- **Early Start / Late Start** – providing team members the ability to have a schedule outside of normal "office hours" where the team members may come in and leave earlier or come in and leave later in the date
- **Compressed Work Week** – establishing a three or four-day work week that is still full time, such as working Monday through Thursday and having Fridays off (this may not be something you can offer to non-exempt employees due to certain states' over-time rules)
- **Day-to-Day Flex Time** – allowing team members to work flexibly when they need it, for instance attending to medical appointments or getting your car into the shop

- **Flexible Non-Core Hours** – allowing team members to manage their own schedule and flexibility outside of the firm's declared core hours of accessibility (often 9 a.m. to 3 p.m.)

- **No Mandatory Saturdays** – lifting the requirement to work Saturdays during peak busy periods and allowing team members the flexibility to manage their own extra effort and production at a time that works better for them than a Saturday might including evenings, Sundays, etc.

- **Shortened Work Weeks During Non-Peak Times (i.e. Fridays Off)** – establishing a shorter work week, often during the summers, where team members have all day or half-day off on Fridays

- **Unlimited PTO** – eliminating the accrual and tracking of paid time off (PTO) and allowing team members to manage their own schedule and take as much time off as they can manage while still meeting their committed production and other goals (more on this in **Practice Perspectives!**)

In addition to lifting the time constraints, enabling team members to work from anywhere is a key component to a truly flexible culture. Technology enables team members to work away from the office, which lifts the constraints of the limited space of traditional "brick and mortar" office space, which is one of the highest expense areas for firms. In addition, when you remove geographic constraints, you can recruit based on your firm's needs, you can source the best people regardless of where they reside, and further your overall diversity, too. And, lastly, firms often experience an increase in productivity (really!) when they allow flexibility in meeting personal commitments and provide the resources their people need to work remotely from home. **Some examples of flex programs that remove the "place" constraints include**:

- **Day-to-Day Anywhere Work** – providing team members the flexibility to choose to work from the office, home, a client's location or some other location on a day-to-day basis

- **Work from Home** – providing team members the ability to work from home on an as-needed basis or as a permanent work arrangement

- **Remote Team Members** – having a team member in another geographic location away from your office – that may work from home or from a virtual office (see below)

- **"Virtual offices locations"** – having an office space available for team members to work from that is often a leased or shared space in another geographic location. This may be more cost effective in some geographic areas rather than expanding office space in your firm's main major city location.

- **Public Location Drop-in** – identifying public locations that can be available for team members to work, such as at library or hourly rental office spaces

- **Drop-in Offices** – having "open" offices in your firm's facility that are used on a rotating basis by remote or work-from-home workers or even from other team members, such as auditors who are often out at a clients and only need an office on an occasional basis. This is also called "hoteling."

- **Working from the Client's Office** – allowing team members to work from the client's office on other work rather than having to commute back to the firm's office to work

- **Virtual Audit Work** – conducting more audit work from your firm's office (or remotely from home or other locations) rather than requiring team members' to travel to and perform all the work at the client's office location

Developing a Truly Flexible Environment
A truly flexible environment means providing your people with a variety of options as to how, when and where their work is done as we just explored.

To begin or further your firm's flexible work environment, engage your firm's team members in defining your firm's flexible work programs. **Begin by gaining agreement on your non-negotiables, and ensure your flex programs meet and/or exceed them, such as**:

- Profitability (same production or better)
- Client relationships (strengthening relationships virtually or not in a traditional office setting)
- Excellent client service (responsiveness, meeting deadlines)
- Quality (focus, minimizing distractions)
- Teamwork (collaborating with employees who aren't in the same physical location at the same time/place as me, accessibility and responsiveness)

All of these flex time-based options require transparency about team members' schedules and increased specificity on the results each individual team member is expected to deliver, too. Accessibility and responsiveness expectations should be defined for both the flex and non-flex team members. For example, agreement on how to return and report the status or progress of client engagements or projects (one of the five elements of committing with clarity that we wrote about **here!**) need to be established as well as the expectation for supervisors or partners to be available to answer team member's questions.

Flex is also a two-way street. One mistake firm's can make is not discussing that flexible work environments require flexibility from those using it, too. In a flex environment, the need for clear, specific and frequent communication is increased as well as the expectation that team members need to sometimes "flex up" when peak periods or certain clients require it. Being accessible and responsive is critical, too, and expectations need to be defined. For example, a team member may be expected to increase their time and results during peak periods, such as spring tax season, and reduce their time during the summer, or increase efforts for particular projects and reduce efforts during other times.

For more ideas about how to begin piloting additional flex programs, flex "must do's" and lessons learned, access our Inspired Ideas blog series from last year's Anytime Anywhere Work Survey by clicking about here and then entering ATAWW in the search box. In addition, we invite you to complete our 2016 Anytime Anywhere Survey to share your firm's flexibility practices. The survey will be open until June 15, 2016. If you choose to supply your contact information, we will send you a copy of the survey results article(s) as they are initially published.

Control over their schedule and measuring performance based on results instead of time is fast becoming a non-negotiable for our Millennials. To attract next generation talent and sustain your firm long-term, move away from the time and place paradigm and

embrace flexible work programs – the sooner, the better! You can count on us to continue to champion flex practices and if you would like to explore how we can help your leadership team to further your flexible environment, contact Tamera Loerzel at (952) 226-1780 or **tamera@convergencecoaching.com**.

P.S. If you missed our webinar in May, **Moving Away from the Time and Place Paradigm**, you can access the recording **here**.

Unlimited PTO Is for Real – And Can Be For Your Firm!

In our **Leadership Lessons** article, we discussed the importance of flexible work programs and how critical it is for you to keep evolving and expanding your firm's flex programs. In this article, we'll explore the elements important to a successful launch of an "advanced" flex program idea: Unlimited Paid Time Off (PTO).

Unlimited PTO is a flexible work program where team members no longer have a set number of days off per year. Instead, they are trusted to manage their projects and workload on their own terms and take off time when needed, and for the most part, at the time of their choosing. Unlimited PTO is emerging in many organizations, including public accounting firms – a development we are excited to see! While shifting to unlimited PTO requires an adjustment of your procedures and policies, it's not that different from the flexibility many firms are already offering their employees today.

What is Unlimited PTO?

Unlimited PTO programs emphasize a culture of flexibility built on personal responsibility and mutual trust, and essentially the message to your people is "meet your work and production goals, finish your projects, and we don't care when you take time off."

Let's take the example of the team member who crushes it one week, working 65 hours to finish reviewing a series of client deliverables and getting the monthly audit schedule published. The next week, this same team member has a dentist appointment during the work day on Monday and leaves early on Thursday for hockey practice. As a result of these personal commitments, this person only puts 36 hours into the system. Under a traditional PTO model, they would be asked to enter 4 hours of PTO for those two events, regardless of their extra effort the prior week.

Or how about the employee who has a three-week bank of PTO available to her. She has planned a two week fall vacation with her family, and has used the other week by the end of July. She tells her family that because she's already scheduled her full three weeks, she won't be able to take an extra two days at Thanksgiving, even though she's ahead of her realizable revenue goals and other metrics. She feels like there should be a way to have the time off with her family but the firm's policies don't allow her that flexibility.

In both cases, instead of being treated like a professional, empowered to integrate their life with their work, these team members feel like they are being "nickel and dimed" about their time.

Why consider Unlimited PTO

While improving the morale of your people and empowering them to manage their own schedules, there can also be an attractive financial benefit for your firm in eliminating PTO. When you stop track accruing and tracking PTO, you will ultimately experience a reduction of a pretty sizeable accrued liability. In addition, firms spend so much time administering PTO accruals – tracking them, monitoring timesheets and employee accrual balances, and encouraging team members to burn PTO to keep accruals in check. Upon the creation of an Unlimited PTO program, the firm can regain that administrative time which can be repurposed for more meaningful HR efforts.

Another advantage of an unlimited PTO program is the goodwill it creates in teams, where you trust your people to meet their production goals, hit their metrics for the year, bring in the amount of agreed upon business, and achieve whatever other expectations have been established for you. In essence, we treat our people like professionals. **Many firms find that unlimited PTO programs create more committed team members with a passion for the firm (and in turn, the firm's clients!)**.

If you are already offering high levels of flexibility to your team members…if your leaders are less focused on using "face time" to measure an employee's success…if your firm is doing a great job setting clear expectations and situations where there is poor performance, the matter is being managed…then you might be a candidate for an unlimited PTO program.

Getting Started

There are some specific issues that you'll want to consider when transitioning to an unlimited PTO program. **First, these programs are on the leading edge of new HR policy and law, so we recommend that you run your program plans by your firm's labor attorney and that you call any unlimited PTO program a pilot when initially launched**, to allow for changes as you learn.

Firms that convert to an unlimited PTO program need to strategize on how to manage their existing PTO accrual. In some cases, team members have stored up PTO with the expectation to have it paid out, either upon leaving the firm, or when they don't have time to use it, and they might be disappointed to feel they are losing something. Carefully plan how you will position the transition. Options include paying out all or part of accrued vacation (and all at once or over time) or dissolving existing accruals and replacing those benefits with the new unlimited program. Care should be taken when planning the transition to ensure the team doesn't feel they are left with fewer benefits rather than more while balancing the financial impact of the accruals. For that reason, many firms make the transition at year-end, at the "use or lose" point of their program, so unused PTO that "expires" can roll off and any left can be potentially paid out.

Your policy should clearly state that FMLA, short-term or long-term disability and other similar leave of absence events are distinct and separate and will not be managed through the unlimited PTO program. Firms that offer special leaves of absence like sabbaticals, military leave, parental leave and others should spell out how they will be managed in the new unlimited PTO program.

Logistical issues

Here are **some of the factors to discuss with your leadership team and define when developing your unlimited PTO program**:

- **Eligibility** – determine who is eligible to participate in your unlimited PTO program, considering whether both exempt and non-exempt staff and which levels and departments can participate.
- **Blackout periods** – will there be times when team members aren't allowed to take time off? We recognize that there may be certain times when it is difficult to have too many people take time off and these would be the periods to require prior approval on a first-come, first-served basis. To have the program feel truly flexible, limit the number and duration of blackout periods.
- **Approval process** – teams need to ensure coverage and that client service continues as expected, so you'll need to consider whether it's appropriate to have an approval process for planned leaves of a full day or multiple days off in a row. This may vary departmentally or by service line.
- **Coverage** – consider whether you should have "limits" on the number of people within a department, or in a specific role or level, who can take time off at any point in time. This may include the firm's half-day off on Fridays during the summer or for specific roles, such a client support function that require a team member be available for client questions.
- **Accessibility and response time expectations** – firms that develop clear requirements for how quickly calls and emails are returned (even if it's only to confirm receipt and set a future date for follow-up) are likely to have fewer upsets operating in a more flexible manner. Team member calendars should clearly reflect accessibility details – whether team members are off or not and how they can be reached when they are available but working away from the office.
- **Mandatory time off** – research shows that vacation can be as important to mental and physical health as regular exercise and sleep. Consider how your firm will ensure that team members are taking the leave they need to be effective in their work, such as a requiring that each employee schedule a minimum of one full week off each calendar year (in addition to other intermittent time off throughout the year).

Measuring success and ensuring accountability

As you transition to unlimited PTO, plan to assess the program's success at regular intervals. Building in an evaluation process will provide support among your leaders who are less confident about the change and will allow them to rest assured that the program will be adjusted if results aren't what you're anticipating. As we shared in **Leadership Lessons**, any program you create should protect your firm's **business model deal-breakers** like:

- **Production** is at or above expectations
- **Projects** are being completed in the anticipated timeline
- **Client service** hasn't been negatively impacted

- **Team members** are taking time off as expected and are satisfied with the program as designed

Consider evaluating your program at 90 days, 180 days and year-end, with an ongoing annual review after the first year passes. **Rather than trying to build the perfect program out of the gate, be willing to adjust and make changes over time** to ensure the program meets both the needs of the firm and your team members for the long-term.

Ensuring team members feel empowered to use their unlimited PTO

Wouldn't it be a shame if you built the perfect unlimited PTO program and your people didn't benefit from it? This sometimes happens with flexibility programs because team members feel guilty for participating and don't take advantage of the options available to them. **Why Work Sucks and How to Fix It** by Cali Ressler and Jody Thompson posits that most of this guilt comes from "sludge" where people "jab" at each other about their flex schedule. Examples of sludge are comments such as "I forgot you worked here," said to someone who works from home on a regular basis, or "getting your beauty rest?" spoken to someone who prefers to start and end their day at a later time than others. Team members won't stay with our firms, or access our flexible work programs, in the face of such jokes and negativity.

We recommend you educate your leaders to stamp out potential sludge and work to create a culture where team members feel like they are winning in both their work and their personal life. You can start by:

- Encouraging leaders to publicly share their use of flexibility and promote the personal benefits they experience. ("We don't just say we offer flexibility – our leaders take advantage of it, too.")
- Insisting that your people lead by example and mark private appointments as personal on their calendars rather than as just a generic appointment. ("The partners take time in the middle of the day for a personal issue, so it's okay for me to do it too.")
- Finding ways to emphasize what your team members do when they're not at work. At Middleton Raines + Zapata, a public accounting firm in Houston, team members are encouraged to snap photos of themselves with a company symbol (the **MRZ "hand"**) while enjoying themselves away from the office to promote fun and time off and encourage a healthy work/life balance. ("I'm not the only one who has a life outside of work, our leaders do too.")

Start creating a culture of acceptance for work/life integration to realize the full benefits of your unlimited PTO or other flex initiatives.

We are encouraged by the interest and buzz around unlimited PTO programs and can't wait to see new developments unfolding in the public accounting firm marketplace. We would be happy to help you make the transition to an unlimited PTO program, so please contact Renee Moelders at (651) 332-0495 or **renee@convergencecoaching.com** to discuss your firm's circumstances and plans in more detail.

ConvergenceCoaching Honored at 2016 BDO Alliance Conference

We are honored to have received the Michael G. O'Hare award during the 2016 BDO Alliance Conference. The award began in honor of the commitment of former BDO Aliance USA Executive Director, Mike O'Hare, to the program and his nearly 20 years of service in the role. The award was presented to two firms, one CPA firm and one Business Resource Network (BRN) firm, with ConvergenceCoaching receiving the BRN award. An impartial panel reviewed all nominations and announced the two recipient firms during the closing ceremony of the conference. Partner and co-founder Jennifer Wilson and partner Tamera Loerzel received the award on stage and thanked their fellow member firms for their continued support and collaboration.

From our co-founder and partner, Jen Wilson: *"We are honored and humbled to be recognized by our great friends at the BDO Alliance USA with an award that affirms our participation, collaboration and camaraderie within the Alliance. For nearly twelve years, we have been engaging with BDO Alliance USA firms to envision and implement growth strategies and develop great leadership within their firms."*

Happy "Sweet 16" to ConvergenceCoaching, LLC!

Our firm celebrated its 16th year anniversary on April 1, 2016 and we couldn't be more grateful for our continued work helping our clients achieve their leadership and practice management goals. As Jennifer Wilson explains in our recent anniversary blog post, "At ConvergenceCoaching, we've found our sweet spot in the work that we get to do every day, which includes building relationships with fantastic clients and developing people – both our internal team members and team members in the firms we work with." We invite you to read the full post **here**.

We look forward to our "Dancing Queen" (only 17) year and the opportunity to deepen our relationships with our clients and friends!

Jennifer Wilson Named 2016 CPA Practice Advisor Thought Leader

Jennifer Wilson was honored in February during the sixth annual CPA Practice Advisor Thought Leader Symposium as one of the publication's 2016 Thought Leaders. During the symposium, she and her fellow honorees engaged in discussions around emerging trends in the profession and the biggest challenges that firms are facing. Read more about the event and the other honorees, **here**.

Service Spotlight: Rainmaker Development Program™

The ability to develop business is a skill that most firms seek in their future leaders – especially with the significant loss of entrepreneurial Baby Boomers in the next decade. It is also an area where accounting professionals feel most uncomfortable. Add to this the fact that rainmaking ability is something that is developed less through learning and more through practice and you have a profession that is truly at risk for not having enough business developers in a few short years.

That's why **we developed a new approach to teaching rainmaking** that we call our Rainmaker Development Program™ (RDP). This 6-9 month program provides a mix of learning and "real life" experiential activities to build true skills in personal marketing and business development.

When we work with you to facilitate an internal RDP, we first ask you to identify a "guerilla team" of 12 team members who **must opt in** to participate. Ideally, each participant is then assigned an in-firm coach who will help mentor them through the program.

Our standard program entails six virtual roundtables that teach participants critical personal marketing and business development concepts. Between roundtables, RDP participants are tasked to complete assignments with support from their in-firm coach, reporting their progress by a specific date. In each subsequent roundtable, we discuss challenges and successes, learn the material for the next concept and agree on a new assignment to facilitate real learning and progress. The specific topics taught in each RDP are customized based on a firm's goals and the experience level of the group they identify. Some of the more typical topics include:

- **Developing as a rainmaker** – the why and the how
- **Deepening client relationships**
- **Traditional networking and social media**
- **Rainmaking activities, including referral relationship development and meetings**
- **Delivering effective proposals and six steps to selling**
- **Targeting and going after new and ideal accounts**

We have also kicked off our first public RDP, a group of 12 participants from different firms developing the same skills outlined above. This allows firms to provide business development training to only one or a few individuals if they don't seek to fill an internal program.

For more information about our public or in-firm rainmaker development programs, contact Tamera at **tamera@convergencecoaching.com** or visit our **website**.

We'd Love Your Input to our Anytime, Anywhere Work Survey!

We've launched our third annual Anytime, Anywhere Work Survey (ATAWW) and are requesting your participation. The goal of this survey is to collect data on the public accounting firm adoption of anytime, anywhere work practices and the experiences you've had with these initiatives. This information will be used to identify the latest flex trends and will be shared in a number of publications and used in various educational presentations. If you choose to supply your contact information, we will send you a copy of the survey results article(s) as they are published and we may contact you for potential opportunities to share your story.

Please respond only if you own or work within a public accounting firm and **please coordinate between your Managing Partner, Firm Administrator and HR professional so we only receive one response per firm as this email may also be sent to all of the people who hold those roles within your firm**.

We are seeking feedback from all public accounting firms – whether or not anytime, anywhere work practices are prevalent in your firm.

The survey is open now through **June 15th** and should take **no more than twenty minutes** to complete. **Click here to take the ATAWW survey**.

Thank you in advance for your participation – your feedback is important to us!

The CPACA Launches a Book on Bridging the Generational Leadership Gap

Members of the CPA Consultants' Alliance (CPACA) have collaborated to produce a new book intended to help bring current and emerging leaders together – **BRIDGING THE GAP: Strengthening the Connection between Current and Emerging Leaders in the CPA Profession**. The book consists of 14 chapters that offer best practices and discussion questions for opening up communication in your firm. Business development, succession planning, transparency and people engagement and retention are just a few examples of the topics covered throughout the chapters.

The book is available in both softcover and Kindle formats for the cost of $49.99. You can purchase either format of the book by clicking on the following links:

- **Purchase the softcover version**
- **Purchase the Kindle version**

Benchmark Your Firm with Results from Various MAP surveys

The Rosenberg MAP Survey and the **AICPA PCPS/CPA.com National MAP Survey** are excellent resources 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 that will allow you to evaluate how your firm compares to others in your geography and with other firms your size. **The Rosenberg Survey is available for input** by clicking **here**. **The AICPA PCPS/CPA.com National MAP Survey is open through July 15 for new participants and through July 31 for all registered participants.** The survey can be accessed, **here**.

The **INSIDE Public Accounting National Benchmarking Report** is now available for pre-order. The report includes all aggregated data compiled from participating firms in the IPA Survey and Analysis of Firms.

More than 300 data points from the survey are analyzed and broken down by revenue bands and geographical locations. Both print and PDF options of the report are available. **Pre-order the 2016 Benchmarking Report and other Benchmarking tools**.

Client Corner

Ed Guttenplan of Wilkin & Guttenplan, PC Appointed NJCPA President-Elect
Our client and friend, Ed Guttenplan, Managing Partner of Wilkin & Guttenplan, PC has been appointed President-Elect of the New Jersey Society of Certified Public Accountants (NJCPA) effective June 1, 2016. In the firm's **press release announcement**, Ed shared that, "The profession has been great to not only me, but the whole Wilkin & Guttenplan team and I look to give back through my volunteerism and this leadership role…While ever-changing, the future is bright and I hope to serve our current members as well as the next generation of future CPAs." Congratulations, Ed! We wish you great success in your new role.

Accounting Today Top 100 Firms
Congratulations to our clients and friends who were named to the ***Accounting Today*** **Top 100 Firms** list:
AKT CPAs and Business Consultants, BDO USA, Berkowitz Pollack Brant, BKD, Burr Pilger Mayer, Inc., Eide Bailly LLP, Habif, Arogeti & Wynne, Hein & Associates, Honkamp Krueger & Co., Horne, Katz, Sapper & Miller, LBMC, Miller Kaplan Arase, Montgomery Coscia Greilich, Moss Adams LLP, Schenck SC, LLP, The Bonadio Group, and WeiserMazars.

Clark Nuber, Brady, Martz & Associates, Peterson Sullivan, REDW, Johnson Lambert, Green Hasson Janks and PKF Texas made ***Accounting Today's*** **Beyond the Top 100: Firms to Watch** list. Congratulations!

Welcome New Clients!
The ConvergenceCoaching team welcomes our new clients to the ConvergenceCoaching circle of friends! Warmest welcome to:
Brady, Martz & Associates, P.C. in Grand Forks, ND
Charles A. Barragato & Company in Smithtown, NY
Honkamp Krueger in Dubuque, IA
Lavine Lofgren Morris and Engelberg, LLP in La Jolla, CA
Leaf & Cole, LLP in San Diego, CA
O'Connor & Drew, P.C. in Braintree, MA
Presley and Partners in Courtenay, BC
Sassetti LLC in Oak Park, IL
Sensiba San Filippo LLP in Pleasanton, CA
Williams Adley in Washington D.C.

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

Upcoming Speaking Events!

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

June 21-22 – Minneapolis, MN
CPAmerica International 2016 A&A Conference
www.cpamerica.org
Presentations:
> Attracting and Motivating Team Members
> Practical Strategies to Truly Engage Millennials

June 27 – Washington D.C.
2016 Allinial Global International Forum
www.allinialglobal.com
Presentations:
> Developing Leaders to Sustain Your Firm's Growth

July 14 –Denver, CO
Upstream Academy HeadWaters Conference
http://www.upstreamacademy.com/headwaters.asp
Presentations:
> Consulting Services vs. Compliance Services: Managing the Difference
> Stop Kissing that Frog! Finding Your Ideal Clients and Making Them Yours

August 8 – Austin, TX
CPAmerica Next Generation Conference, Track 2
www.cpamerica.org
Presentations:
> Effectively Transitioning Responsibility from One Generation to Another
> Strategies to Truly Engage and Retain Your People

August 24 – Hickory, NC
NCACPA Succession Planning Workshop
http://bit.ly/1TYBcY7
Presentations:
> Make Succession a Strategic Process

September 21 – Morrisville, NC
NCACPA Succession Planning Workshop
http://bit.ly/28kfqCr
Presentations:
> Make Succession a Strategic Process

September 22 – Minneapolis, MN
CPAmerica Leading Partner Conference & Firm Administrator Roundtable
www.cpamerica.org

Presentations:
> Great Firms Have a Vision For the Future! What's Yours?
> Advanced Recruiting Ideas To Drive Practice Growth

December 6-7 – Las Vegas, NV
The Digital CPA Conference 2016
www.DCPA16.com
Special Discount: Use the peer discount code "**PEER**" to take an extra $100 off your registration fee!

Take a look at the content and register today! We'd love to see you so let us know if you will be attending any of these events.

To access our catalog with a complete listing of topics for **speaking, teaching, and custom in-firm programs**, visit **www.convergencecoaching.com/what-we-do/training-development**, and to keep track of updates to our speaking calendar, please visit **www.convergencecoaching.com/events**.

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.

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 21 – What Does it Take to Make Partner? New Partners Share Their Journey**
- **July 12 – Why Positivity Matters to Your Leadership**
- **July 18 – Technology to Differentiate Your Firm and Create a Competitive Advantage with guest speaker Jim Bourke of WithumSmith+Brown**

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 at **www.convergencecoaching.com/news-and-events/recorded-webinars**.

Connect With ConvergenceCoaching in Social Media

If you haven't connected with us on social media platforms, click on any of the following icons to be directed to our sites!

Facebook

LinkedIn

Jennifer Wilson's Twitter

Tamera Loerzel's Twitter

Inspired Ideas blog

Google Plus

Instagram

Pinterest

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**.