

Title: Driving Value & Profitability and the Attributes of Highly Successful Firms

The most progressive CPA firm understand that success is often defined in terms of continuously creating value for partners, employees and clients and that the interests of these groups is inextricably linked. Driving Practice Value & Profitability should be at top priority for becoming a successful firm of the future.

The first focus should be on clients, but this cannot be achieved unless the best staff people are recruited, developed, retained, and rewarded, and unless the firm consistently increases profit-ability as an ROI to its partners.

Major Topics:

- The dynamic CPA Firm landscape and facing the challenges of future competition for clients and quality professional staff.
- The Top 10 Factors of adding value and increasing profitability in your firm. The importance of adding value to properly position your firm and partners in the marketplace.
- Using talent and leverage to build a firm of the future. Building a firm infrastructure and using the leverage of the traditional firm pyramid to increase profitability.
- The most overlooked and underrated profitability issues. Running the firm more like a business and holding the partners accountable for profitability and value enhancement.
- Discussion on the attributes of high value CPA firms and why they are so successful.

Learning objectives:

- Why continuously adding value is important to your firm's future success and succession planning. Why you may not have a choice if the goal is to avoid merging up.
- Where your firm needs to be on the value curve 3-5 years from now.
- How to drive value & profitability in a challenging succession and competitive marketplace.