Top Gun Fighter Pilot Shares ‘Flawless Execution’ Strategies With Leaders At The 2013 PRIME Symposium

It’s hard to imagine interacting with co-workers nicknamed “Maverick” or “Iceman” on a daily basis, and it’s even harder to imagine criticizing them, but Major Joel “Thor” Neeb says that’s exactly what should happen in order to improve, not just in the Air Force but in all businesses – including the accounting profession.

Neeb, a San Antonio-based active duty Air Force fighter pilot who is also a management consultant with Afterburner, Inc., says the “nameless, rankless” debrief process Afterburner advocates is often met with much skepticism by professional service firms fearful of pointing out flaws to leadership who are rarely questioned or challenged.

“I’m a fighter pilot,” Neeb says. “I deal with egos the size of Texas all the time and yet we do it.”

Neeb shared his message and lessons learned from the cockpit on Nov. 5 at The PRIME Symposium hosted by The Platt Group and INSIDE Public Accounting, and spoke afterward about applying the debriefing best practices concept to firm management. The debriefing process is just part of Flawless Execution, Afterburners’ continuous improvement process – plan, brief, execute, debrief – that combines military techniques with an open communication management style.

Fighter pilots debrief after each mission, providing that “ever-so-constructive” feedback – positive as well as negative – that fuels ongoing improvement each and every time, Neeb says.

A sign hanging on the door of the debriefing room says it all: “It’s not who’s right, it’s what’s right.”
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Everyone, including leadership, involved in the debriefing process takes responsibility for his or her part in the job, calls out what they could have done better and offers comments on the performance of others within the group.

Open communication has to start at the top, Neeb says. During the debriefing process for the fighter pilots, for example, the general must tell everyone in the room how he failed and how he can improve. This sets the tone, opening the way for others to comment. “I need to tell the general what he did wrong. If I don’t tell him, I’m saying it’s OK to sweep things under the rug,” says Neeb.

In addition to fear of egos, another obstacle in the debrief process is that professionals believe they don’t have time to look back. They say that their projects are not as easy to evaluate as a practice flight with a clear beginning and end. Neeb says that projects should be broken down into smaller, measureable pieces.

What was your mission objective this week? How well did you execute your plan? He adds, however, “Folks are not going to be excited about this at first. You’re adding another meeting to their already busy day.” But over time, they’ll see that processes are getting better and better.

The corporate teams that execute their objectives the best are the ones who use the debriefing process. Neeb, who has spoken to large corporations and NFL teams alike, says athletes are continually studying past performance and coming up with ways to improve. “They already pivot and adjust and adapt better because of it.”

In addition to the debriefing process, Neeb says he hopes that the firm leaders at the 2013 PRIME took away the importance of alignment, meaning that the goal of the firm is clear to everyone at every level.

One of the many challenges of an MP is getting the partner group to “face the same direction and accomplish the same objectives,” he says.

“Face the same direction and accomplish the same objectives.”
During Neeb’s presentation, he showed a video of a colleague on an F-15 training mission who was focused 90% of the time on what was going on outside the cockpit. He never lost sight of the threat or the mission objective. “If you lose sight, you lose the fight,” Neeb says.

“Task saturation” is one reason professionals can lose sight of their goal, he says. Having too much to do without the tools, time or resources to do it drains performance and diverts attention. “It’s the silent killer because it’s slow and insidious,” Neeb says. About 80% of the time, people react to task saturation by channeling their attention on one thing to the detriment of the bigger picture.

To illustrate an extreme example of task saturation, Neeb showed a National Transportation Safety Board (NTSB) video – including actual audio recovered from the cockpit voice recorder – that recreated the events surrounding an Eastern Air Lines flight that crashed in Florida in December 1972. The crew was unable to determine whether the landing gear was properly locked in the down position because an indicator light was not illuminating as it should. The autopilot was engaged at 2,000 feet to troubleshoot the problem. However, the crew became so preoccupied with what turned out to be burnt-out light bulbs that they failed to notice the autopilot had become disengaged, sending the plane into a disastrous descent and crash.


The NTSB determined the cause as “the failure of the flight crew to monitor the flight instruments during the final four minutes of flight, and to detect an unexpected descent soon enough to prevent impact with the ground.”

The crash killed 99 on impact. Two survivors died later as a result of their injuries. No problem was found with the landing gear.

Neeb urged PRIME guests to embrace clear and open communication with a mission objective the entire team/firm can rally around. The next step is to plan how to achieve the objectives. Too often, companies start planning first, which is a little like getting into a car and starting to drive without knowing where you want to go, he says.

Neeb reminded the PRIME guests that their actions speak louder than words. Be mindful of what you’re measuring in your firm. Don’t say you value one thing, but reward another. “You need to not only say you want the one-firm, one-team concept, you have to be able to live that as well.”

Neeb says the leaders at the PRIME were very open to the message being offered. “That’s the sign of a profession that is going to take off,” he says. “That’s pretty exciting.”
Six Months Into RBZ’s New Approach To Firm Management: An Update On The CEO From The Corporate World

Many people think John Schweisberger resembles the 42nd President, Bill Clinton. He hears it all the time. On his first day as CEO of RBZ, he was formally escorted into the office elevator along with two men standing stick straight against the wall in black suits, earpieces and sunglasses. Secret Service? “I didn’t catch on right away,” says Schweisberger.

The firm’s marketing manager, Mishel Justesen, drew him into the lobby, where he was greeted by flashing cameras and screaming women demanding autographs. He turned the corner to see a red carpet, lectern with presidential seal and “Hail to the Chief” playing in the background. Then the faux press conference started. “What’s your intern policy, Mr. President?”

An hour later, he was pulled out of a meeting abruptly. Six women wearing Hillary Clinton masks jumped out from hiding spots armed with Nerf guns. “A firefight ensued,” Schweisberger says. That wasn’t the end of it. Two dozen cans of Silly String were emptied onto him during a public luncheon later that day.

Anyone worried that the first CEO in RBZ’s history was going to “go all corporate” needn’t have worried. Schweisberger was happy to play along, signing 8-by-10 glossies of Clinton and even calling his weekly staff email update, “What’s Up With Bill?”

After spending 150 hours or so with partners and staff leading up to his selection as CEO, he knew all about the firm’s culture. If he came across as a heavy-handed leader, he wouldn’t have made it through the search process, he says. If he wasn’t going to fit in, he wouldn’t have been chosen to move the firm ahead.

While Schweisberger brings a wide variety of corporate management experience to the $25 million Los Angeles firm, he is not a CPA.

Schweisberger says he’s heard of three firms that have brought in CEOs from the corporate world, but he’s the only one who isn’t a CPA, that he is aware of. “Not having grown up in that culture, I think a little differently,” he says. “Whether it’s for the better or not remains to be seen, but certainly from our firm’s perspective it’s been very welcome to have a different mindset coming into the leadership chair.”

He joined RBZ July 1 after a stint as MP with Computer Sciences Corporation’s Global Business Solutions Group. Prior to that, he was a partner with PricewaterhouseCoopers’ Consulting Group. Accounting firms aren’t so different than other professional services firms, he says, “it’s just a different product coming out the door.”
Rather than looking at the business with an accountant’s mind, he can see various sides of an issue by tapping into his past work in marketing, sales and consulting. For example, instead of pushing out the products and services the firm already provides to the business community, Schweisberger says he is doing the opposite: “looking from the outside in.” He is studying what small businesses need – perhaps data storage or disaster recovery help – and determining whether RBZ can provide the solutions.

He added that MPs don’t get into the accounting business because they want to administer a firm. They want to serve clients. Often, MPs do just that, keeping their heads down and working steadily until it’s time to retire. Moving from governance by practicing partners to full-time executive leadership is something of a transition for the firm. “We’re feeling our way through that a little bit, but not all that much,” Schweisberger says. “They were very happy to let me start running things, that’s not what they got into this profession to do.”

An advisory board, with a group of rotating partners, talks over the issues with Schweisberger “to make sure I don’t step into any land mines,” he says. He chairs the regular partner meetings. Partners report to him on progress with initiatives, and he in turn reports to them on finances. It’s a typical CEO/board relationship that he is quite comfortable with from past experiences, he says.

Relationships among the top leaders of the firm were helped greatly by the long vetting process involved in the search for the new CEO, he says. After his first round of meetings with the five-member search committee – there were three rounds of meetings in all – Schweisberger developed a 100-day plan as a proposed course to follow if he was hired. He divided the plan into three phases: Listen and Learn; Analyze and Plan; Communicate and Launch. “It really served as an excellent set of actions to follow,” he says.

At first, he met with everyone from junior staff to partners to clients to accounting insiders to soak up as much information as he could. People at the firm were wondering what went on in all those meetings, which is where Schweisberger came up with the “What’s Up With Bill” emails. (One staff member got so comfortable with “Bill” that she actually called him that in a meeting once. He called her Monica in return.) He told staff he wasn’t saying much in those early meetings, he was just listening. He is communicating often, and giving staff the “beginning threads” of where the firm is heading.

Schweisberger stresses that he wasn’t brought in simply to manage what had already been built at RBZ. He is charged with leading an aggressive, but strategic, growth strategy that combines organic growth with outside opportunities.
He asked professionals in every service line, niche and administrative function to develop a four-year strategy. When all that information was pulled together, firm employees had come up with 93 initiatives that should be undertaken in the next four years. Schweisberger boiled those down to 20 that should be started next year in the areas of client service, operating excellence, new business development and innovation.

“People are really rallying around the notion that we have a plan, we have a means to get there, and we’re in the early stages of seeing tangible progress to making it happen.”

The PRIME Symposium MP Panel Discussion: Firmwide Strategy And Execution

One effective way to learn about firm management is to hear from the top performers themselves. A highlight of The PRIME, held Nov. 5 and 6 in Indianapolis, was a panel discussion among MPs, led by moderator Kris McMasters, former co-CEO of CliftonLarsonAllen (CLA) and founder of McMasters Consulting. Below are some comments shared in the wide-ranging conversation.

Panelists: Tony Argiz, Miami-based MBAF; Paul Argy, Chicago-based BDO USA; Ken Baggett, New York-based CohnReznick; Jeff Bickel, Tanner of Salt Lake City; Ted Dickman, Springfield, Mo.-based BKD; Gordon Krater, Southfield, Mich.-based Plante Moran; and Dave Sibits, Cleveland-based CBIZ.

Q: Can you describe how your firm sets your vision for the future and strategies to take you there?

Argiz says it’s important to spend at least two full days every five years or so in a firmwide meeting that re-examines the vision for the firm and whether the strategies being used need to be adjusted. Successful implementation relies on knowing the strengths and weaknesses of the individuals who will be involved.

Argy notes that BDO CEO Wayne Berson decided to do a long-term strategy session that took an entire year. “What better way to get partner buy-in than to have them be part of the process of creating the plan?” Argy says.

Bickel says that he is coming from a much smaller, one-office firm, where the vision is set by the leadership. Getting buy-in from the younger generation has been a challenge, he says, but having three former MPs sit on a panel to discuss the history of the firm helped link the past to the present.

The key to getting buy-in is to make the firm’s strategic plan “their plan,” Krater says. “Who’s they? Everybody.” Participation came from every corner of the firm and professionals made the effort because they feel like they are “part of a higher purpose,” he says.

Baggett agrees that participation is the key to success. “When people believe they’re making a difference in participating they will buy in naturally.”
Bickel adds that people stay in their jobs because they feel they’re part of something bigger and they like their coworkers. “We’re intensely focused on the customer experience,” he says. “That’s what we focus on, if we can communicate that to the entire firm, they tend to have a much more vested interest in the future of our firm.”

**Can you describe your ongoing processes to communicate strategy?**

Krater participated in media training and uses what he learned in communicating with firm members. Krater admits he doesn’t Tweet – but he writes a blog and the firm is using more video communications. He says that one weakness among leaders in general is that they tend to be task-oriented and the industry as a whole should do a better job celebrating victories. “I think celebrating is important, especially for the younger people.”

Sibits believes in “management by wandering around” and getting to know people in the firm. “Nothing is better than being out there in the field spending time with the leadership and the entire office.”

BDO communicates information daily, and Argy relies on department heads to communicate the vision, although he noted, “You can’t communicate your passion without doing it yourself.” Argy added that the industry has many natural skeptics. “In our profession there are always people who are going to doubt. They are trained to do that.”

Argiz says video conferencing has proven to be effective, but he also enjoys small breakfast meetings to learn about the issues in various offices.

Weekly messages were an effective tool at CLA. “One thing I found is that people wanted to get to know me,” says McMasters.

**How do you move strategies into operational plans?**

Baggett, co-mp of CohnReznick, says that the firm has benchmarks and strategies for each business development unit that is discussed every quarter. “Strategy without accountability is nice cocktail talk.”

Coordination is a challenge for BKD, with 35 offices across 14 states, Dickman says. Identifying the right leaders who are passionate enough for the job is key. He also noted a weakness in the process, which is failing to spend enough time reviewing successes or failures afterward. “I think we could learn a lot more by frequent debriefing.”

Sibits says the firm sometimes reacts too quickly to whether the right person is in the job or whether the cost of implementing a particular strategy exceeds the potential return on investment. “It’s important to recognize that you have to give some rope for people to enjoy that success.”

**What’s more important? Good strategy or good execution?**

“Execution is more important,” Baggett says. It’s fascinating that some firms can be successful even if their strategies don’t sound that great. “You can never change bad execution. Bad execution is failure,” he says.

Argiz and Krater agree. “If you can’t execute it, the strategy is worthless,” Argiz says. “Execution carries the day,” says Krater.

“Having the partner group unified behind something is the most important part. I don’t think there’s any substitute for that,” Bickel says.
Thoughts From IPA’s “Most Admired Peers” Part 2

No MP got there alone, and no firm can successfully grow without a team effort. IPA’s 23rd Annual Survey and Analysis of Firms asked more than 500 participants to identify their “Most Admired Peer,” and the top five leaders agreed to share their thoughts not only on the state of the profession, but also on their own leadership styles and those they admire.

Last month, we heard from Ken Baggett, Steven Knebel and Jeffrey Weiner. This month, two of IPA’s “Most Admired Peers” look back on their early days as MP, share insights into trends in the profession and tell us about how they’re positioning their firms for future growth. They are Rick Dreher, MP and chairman of the board of Milwaukee-based Wipfli LLP (FY13 net revenue of $165.2 million) and Gary Shamis, former CEO of Cleveland-based SS&G (FY12 net revenue of $79.1 million).

**Dreher:** Being a problem-solver by nature is great when you’re in client service, but that skill can be less desirable when someone walks into your office with a problem, Dreher says. Instead of coming up with an answer, Dreher says he needs to challenge the talented people at the firm to come up with suggested solutions. This approach can help develop future leaders, he says, noting that at a new partner orientation, the group was given the task of making changes to the firm’s flexible time-off policy with positive results. “I’ve got to stick to my guns and get them to think through the problems on their own.”

**Shamis:** Shamis stepped down as MP in May, with Bob Littman succeeding him, but Shamis remains as president and a senior managing director. He said he has always worked on gaining a broad understanding of the issues within the firm as a whole and within each office. He also works on being a better listener. While he says he has improved from his early days, “I would have always liked to do it better.”

**Dreher:** Looking back, Dreher says he would have tempered his enthusiasm for change. “We bit off a whole lot in a small amount of time,” he says. For example, Wipfli created Wipfli University to promote lifelong learning, developed a curriculum internally and added CPE requirements. This was on top of changing the firm’s billing philosophy and establishing the Wipfli Way, an internal and external culture statement. While the firm “powered through it,” professionals had to adjust to too many new processes and initiatives at one time. The unintended consequence was that the changes actually took longer to implement, Dreher says. “In hindsight, I do have to say I think I overburdened the firm early on.”
Shamis: “You’re asking the wrong person that question. I can’t even think back 27 years ago,” Shamis jokes, then adds, “Over my career, my biggest failure was not finding ways to invest in people I should have invested in.” In his early days, he felt he couldn’t take the risk to pay the salaries needed to attract top talent, but feels he should have taken that leap. Today the firm has made several strategic hires of high-level professionals from Big Four firms. “That’s how you move forward.”

Dreher: Wipfli’s business model is a bit different than most firms, as more than a third of its revenue comes from consulting or other value-added services, Dreher says. It’s not a traditional audit/accounting/tax firm, with more than 300 professionals working on the consulting side. So while the recession changed the revenue mix, with traditional services staying flat or decreasing, consulting “did an excellent job and saw significant year-over-year growth,” Dreher says. In down times, clients asked Wipfli for help with efficiencies, through lean and process/profit improvement tools, for example. In better times, Wipfli can help clients use technology as a key component to their success. Hiring new professionals also keeps the firm ready for future expansion. Dreher says that more than 100 people have come on board this year, with about 50 set to attend a week-long orientation for new hires in January. It’s the responsibility of everyone at the firm to help it grow, he says. “All 1,200 of us have to be focused on leads and filling the pipelines. It’s an all-hands-on-deck approach to growth.”

Shamis: While SS&G experienced a “significant uptick” about a year and a half ago, profits haven’t risen significantly due to major investments, most notably in the biggest merger in the firm’s history – a Jan. 1 deal with Silver, Lerner, Schwartz & Fertel that added about 50 people to the firm, Shamis says. Additionally, the firm hired five or six senior professionals, including two partners from Big Four firms, and a few service lines were added. These investments, in excess of seven figures, are positioning the firm for even more growth.

Dreher: Consolidation within the industry will continue, Dreher says. As Baby Boomer partners consider retirement, more of them are finding it makes sense to merge into a larger firm. Wipfli is always looking for appropriate firms that are interested in merging up as well. As for Wipfli itself, Dreher says 2014 will be the “best year ever.”

Shamis: Accounting firms have grown successfully in part because of a stable work force, with professionals building relationships with clients over a period of many years, Shamis says. He sees that changing, as it is increasingly difficult to retain professionals 35 and younger as the economy improves and more opportunities open up to move to other firms.
While Shamis says his firm “does a better job than most” with next-generation workplace issues, he no longer foresees young people staying with the firm their entire career. “I think we’re going to have to learn to run these businesses with a churning work force.”

**WHO IN THE PROFESSION DO YOU ADMIRE, AND WHY?**

**Dreher:** Hesitant to name one or even 20 people, Dreher says he admires the group of MPs of similar-sized firms who are very welcoming and open about helping their peers solve problems. “I could pick up the phone and ask any one of them, and they’ll stop what they’re doing and they’ll assist.” He’s most impressed, however, with all the two-earner families in the profession who are able to devote themselves to their work AND their home lives and somehow make it all work. He said his wife, Susan, was able to stay home with their two daughters. While he focused heavily on his work responsibilities, she managed the home. He marvels at the project management skills it takes to not only be an excellent employee, but a committed parent and spouse. “It amazes me how they can balance all that and keep the right frame of mind. I certainly know what it took me and the effort I had to give, but they’re committing similar efforts while balancing all that at home too.”

**Shamis:** Shamis names Allan Koltin, who is also a friend, as a knowledgeable consultant to the industry. “I’m always blown away by how much he knows.” AICPA President and CEO Barry Melancon has changed his focus and led great change in the profession, Shamis says. He also says of large-firm MPs, “I have a lot of appreciation for what they’ve done.”

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**Platt’s Perspective: It’s A Jungle Gym Out There**

By Kelly Platt

On my annual vacation, I typically select one or two business books and one just-for-me book to read during my shutdown time. This year I chose *Lean In* by Sheryl Sandberg as one of my business books. I have no doubt you’ve heard about it. The gist is she encourages women to “lean in,” define their ambitions, and not let anything hold them back as they pursue their goals.

I read the chapter, “It’s a Jungle Gym, Not a Ladder,” from my window seat somewhere over the Pacific. This chapter resonated with me. I thought, “I wish I knew this when I entered the workforce.”
The traditional analogy for moving up in the workplace is the corporate ladder. But Sandberg notes all that is changing – for women and men – in favor of the jungle gym. Rather than climbing up, down, or staying put, people are exploring different paths on the way to the top.

I understood what Sandberg was saying. I, too, have taken the jungle gym path. There was no ladder in my future, so I thought. I had no idea how I could contribute to the corporate world. I had no path. I had no strategy. I just needed to make a living, and I let things happen.

Sandberg also says, “We need to start talking about how women underestimate their abilities compared to men and how for women, success and likeability are negatively correlated. What this means is that as a woman becomes more successful in the workplace, she will be less liked. Women need a different type of management and mentorship, a different form of sponsorship and encouragement than men,” she says.

“As traditional structures are breaking down, leadership has to evolve as well – from hierarchy to shared responsibility, from command and control to listening and guiding. You’ve been trained by this great institution not just to be part of these trends, but to lead,” she says. Sandberg goes on to say, “The workplace is a difficult place for anyone to tell the truth, because no matter how flat we want our organizations to be, all organizations have some form of hierarchy.”

“Think about how people speak in a typical workforce. Rather than say, ‘I disagree with our expansion strategy’ or better yet, ‘this seems truly stupid,’ they say, ‘I think there are many good reasons why we’re entering this new line of business, and I’m certain the management team has done a thorough ROI analysis, but I’m not sure we have fully considered the downstream effects of taking this step forward at this time.’ As we would say at Facebook, three letters: WTF,” she says.

According to Sandberg, making the best decisions in business today is challenging due to the fact that no one tells the truth anymore; people lie about ideas, opinions and feelings about something.

There is a solution: “In being able to understand that the truth is subjective for everyone, and that people may very well have very different notions of truth. Because of this, individuals need to create a dialogue in which each participant feels comfortable sharing his or her idea of the truth. Empowerment comes from not only being able to listen to the opinions of others, but also from being able to take full responsibility of mistakes. Authentic communication demonstrates the power of an open mind,” Sandberg says.
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Predictions For 2014 And Beyond  
By Joe Tarasco, Accountants Advisory Group

As we enter 2014, the profession and marketplace will continue to evolve rapidly. Below is an excerpt from Tarasco’s recent blog post.

- Fee pressures, rising labor costs and lack of quality staff will force firms to examine their mix of services, industry concentrations and positioning within the marketplace.
- Industry, niche and service segments will be viewed as profit centers and the partner groups will have to increase profitability in respective areas. Partner accountability will put more responsibility on leaders to better manage the recruiting process, staff development, retention, marketing, work flow optimization and efficiency. More firms will move toward an up-or-out policy versus the permanent manager type of structure.
- Career development and leadership training will continue to grow.
- Consolidation of the IPA 100 will continue at a faster pace.
- Firms will reevaluate their partner retirement structures and policies and will adjust them to ensure that up-and-coming stars and younger partners do not leave and to also attract quality partners and merger candidates.
- Partnership structures will fade away, in the most progressive firms and be replaced by a corporate structure.
- Mergers of similar size firms with less than 20 partners will increase as a succession and growth strategy.
- Partner compensation will shift to higher levels of performance and contribution to the future successes of the firm.
- There will be mergers of international associations over the next five years as associations lose key members to mergers and acquisitions.
- Smaller firms will split or dissolve due to a lack of partner consensus. [IPA]

BDO USA (FY13 net revenue of $683 million) expanded into Pittsburgh through the addition of 250 partners and staff in an acquisition of Pittsburgh-based Alpern Rosenthal (FY12 net revenue of $39.2 million). The combination was effective Dec. 16. “Alpern’s entrepreneurial culture, commitment to superior client service and work life balance made them a natural cultural fit with BDO. Combined with other recent additions our firm has made in Anchorage, McLean, Minneapolis, Philadelphia and San Antonio, this is powerful evidence that our growth strategy is continuing to gain momentum around the country,” says Wayne Berson, CEO of
BDO USA. Alexander Paul will serve as MP of the Pittsburgh office of BDO USA. Margaret Tanney will be responsible for managing the Pittsburgh assurance practice, and Celeste Suchko will manage the tax practice. Brandon Otis will lead the business valuation and litigation support practices for BDO Consulting in the Pittsburgh market.

Larry Hyatt & Associates of Brentwood, Tenn., is merging with Chattanooga, Tenn.-based Decosimo (FY12 net revenue of $35.6 million). “This merger will bring our existing clients additional expertise that is critical to businesses for state and local tax audits by taxing authorities, as these taxes are becoming increasingly burdensome and require resolution for sustained success and expansion,” says Decosimo MP Nick Decosimo. “This clearly is a mutually beneficial union for both firms and is expected to result in substantial growth.”

Gaithersburg, Md.-based DeLeon & Stang and Glen Todd & Co., also of Gaithersburg, merged Dec. 1. The combined firms will operate as DeLeon & Stang.

Two Dallas firms, TravisWolff (FY12 net revenue of $18.7 million) and Nicholas Montgomery, are merging. The newly merged firm will operate under the TravisWolff name and will use its office. Six partners and 12 managers and staff will join TravisWolff. Ken Travis, founding partner and chairman of TravisWolff’s board, says that as a combined firm of 103 employees, TravisWolff’s priorities will include providing an expanded scope of services, promoting a family atmosphere and taking a strategic approach to expansion.

Pittsford, N.Y.-based The Bonadio Group (FY13 net revenue of $54.2 million) acquired Stulmaker, Kohn & Richardson of Albany, N.Y. (FY12 net revenue of $1.1 million). The merger will give Bonadio seven employees, which includes two partners, bringing the Albany office to 62 employees. Bonadio’s new partners are Edward Knapp and Timothy Pierce. “We are very much looking forward to welcoming SKR’s people, clients and friends to our firm,” says Tom Bonadio, CEO and MP of The Bonadio Group.

New York-based WeiserMazars LLP (FY12 net revenue of $132.2 million) completed a merger with The Resnick Druckman Group, with offices in New York City and Long Island, N.Y. “We are delighted to have the highly regarded industry leaders of The Resnick Druckman Group and their dedicated team joining our firm,” WeiserMazars MP Douglas Phillips says. Resnick Druckman’s 33 employees – including seven partners and principals and three directors – will join WeiserMazars’ offices in New York City and Woodbury. WeiserMazars’ team of more than 100 partners and approximately 650 professionals are based out of six U.S. offices, Israel and the Cayman Islands.

Michael Ban, JD, joined New York-based CohnReznick (FY13 net revenue of $481.8 million) as a principal and the firm’s trust and estates co-practice leader. He leads the private client service group in New York.

Buffalo, N.Y.-based Freed Maxick (FY13 net revenue of $38.7 million) has hired Joseph Volpe, a former employee, as CFO, Business First reported. He was most recently director of accounting at a senior care center. “One of the things that happens when firms go through different spurts and get to different sizes is the need to find (more) folks for your organization,” MP Ronald Soluri told the newspaper. “When (Volpe) became available, our executive group said it was really time to add that position.”
Mehmet Sengulen has joined New York-based Grassi & Co. (FY13 net revenue of $39.9 million) as an audit partner. He has over 12 years of experience with two Fortune 100 public companies and a regional accounting firm, where he worked with clients in the manufacturing and distribution and technology industries. “Mehmet’s experience will only strengthen Grassi & Co. and add to the industry and public company knowledge we share with our clients,” MP Lou Grassi says.

Michael Savoy, MP of Gumbiner Savett Inc. of Santa Monica, Calif. (FY12 net revenue of $16.3 million), has been elected president of the California Board of Accountancy for 2014. “Becoming president of the CBA is a huge honor,” stated Savoy. “California has the largest group of licensed accounting professionals in the nation. The board is focused on upholding the standards of the profession for consumers but also making improvements for practitioners. We look forward to a successful year.” In addition to Savoy, the newly elected leadership includes Jose Campos, vice president, and Katrina Salazar, secretary/treasurer.

Austin, Texas-based Maxwell Locke & Ritter (FY12 net revenue of $16.4 million) admitted Todd Miller as a tax partner and Dena Jansen as an audit partner in the nonprofit niche.

Frank Gonzalez has been promoted to PIC of the audit department of Miami-based MBAF (FY12 net revenue of $83 million). Gonzalez, based in MBAF’s Miami office, will continue to lead the firm’s financial institutions group and SEC practices. Gonzalez directs the firm’s work with community banks, international banks/agencies and SEC companies. Alexander E. Binelo was also admitted as a partner in the audit department based in the Miami office. Binelo previously served as a director in the firm’s audit department. Binelo is MBAF’s health care audit practice leader and has many years of experience auditing health care organizations, including Health Maintenance Organizations (HMOs), physician clinics and durable medical equipment companies, among others. In addition, Binelo has extensive experience in auditing retail, manufacturing and wholesale/distribution organizations.

MiddletonRaines + Zapata of Houston has admitted Jon Meadows as a tax partner. With over 16 years of tax and accounting experience, Meadows contributes a wealth of specialized knowledge to the firm’s domestic and international tax planning and consulting team. He is also well versed in the management of IRS controversies and defense matters.

RBZ of Los Angeles (FY12 net revenue of $24.8 million) has hired Sam Levin as partner in the firm’s business management practice. Levin specializes in providing services to the entertainment industry, including actors, writers, directors, producers, as well as company executives and high-net-worth individuals. “We’ve seen a growing demand for our business management services,” says John Schweisberger, CEO of RBZ. “Sam’s experience fits in well with that of our team.”

Dean Willingham has joined Albuquerque, N.M.-based REDW (FY12 net revenue of $19.8 million) as a partner in the auditing and consulting department. Willingham brings two decades of accounting and auditing experience, with extensive specialized expertise in commercial industries. 

New York-based Grassi & Co. (FY13 net revenue of $39.9 million) has added a new technology consulting entity – Grassi Technology Consultants, LLC. GTC, a
subsidiary of Grassi & Co., will be led by Kevin Meyer, president, and Paul Engelbert, director, and 20 consultants. Meyer will lead GTC in offering a full service IT consulting business, with a specialization in the implementation and support for Enterprise Resource Planning (ERP) systems. GTC will focus on a variety of industries including but not limited to, health care, food and beverage, manufacturing, pharmaceuticals, retail, technology, construction and financial services.

Cleveland-based SS&G (FY12 net revenue of $79.1 million) opened a new office in New York City on Jan. 1 to better serve East Coast restaurant industry clients. Dana Zukofsky, who spent four years as director of finance for celebrity chef Bobby Flay’s restaurants, will join the firm as an associate director to lead the office at 950 Third Ave.

Long Beach, Calif.-based Windes & Mc Claughry Accountancy Corporation (FY13 net revenue of $23.8 million) has changed its name to Windes Inc. and introduced a new logo. The firm is 87 years old. MP John DiCarlo says, “This new brand launch underscores the firm’s vision to continue our growth as an evolving company and is a reflection of the firm’s commitment to strategically align with our mission – to partner with our clients to provide valuable business solutions. This new look embraces what we have done and continue to do – provide expert advice and deliver sound results that our clients can rely on.” IPA