EXECUTIVE SUMMARY


2017
# 2017 ORDER FORM

**Name______________________________**

**Firm______________________________**

**Mailing Address __________________**

**City____________________ State______**

**Zip_____________________ Phone______**

**Association____________________________**

**Email Address____________________________**

**Amount Due: __________________**

**Payment:** Check  Visa  MasterCard  Amex  

Card #______________________________

Exp. Date_________________ Security Code________

**Name______________________________**

**Billing Address____________________________**

**City____________________ State______**

**Zip_____________________**

**INSIDE PUBLIC ACCOUNTING NEWSLETTER**

Pricing is valid through 12/31/17.

**PDF Single-User**

$568/yr.

**Print Single-User**

$605 / yr.

**Print and PDF Single-User**

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**Firmwide Use PDF**

Starting at $1,698/yr.

**PDF REPORT**

Included with Newsletter Subscription.

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**2017 BENCHMARKING TOOLS**

**THE NATIONAL BENCHMARKING REPORT**

<table>
<thead>
<tr>
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<tr>
<td>PDF Report</td>
<td>$889/copy</td>
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<tr>
<td>Print Report</td>
<td>$899/copy</td>
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<tr>
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**THE IPA FINANCIAL & OPERATIONAL REPORT CARD**

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<td>Financial and Operational Report Card*</td>
<td>$859/copy</td>
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*Available to fully participating firms only. Please allow three business days for preparation and delivery. IPA can also provide you with a CUSTOM REPORT CARD. Contact our office for details.

**THE IPA INTERNAL OPERATIONAL REPORTS**

Available in PDF only.

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<td>Internal Operational Package*</td>
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*Internal Operational Package includes all three PDF reports (Firm Administration, Information Technology and Human Resources).

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**SPECIAL REPORT**

**THE ROAD TO RETENTION: MOTIVATORS AND DRIVERS FOR YOUNG PUBLIC ACCOUNTING PROFESSIONALS**

This report, based on the results of a survey of more than 700 CPA professionals aged 21-40, is intended to assist in the development of strategies to attract and retain this crucial demographic in your firm. A $579 value.

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www.insidepublicaccounting.com
THE ANNUAL
INSIDE PUBLIC ACCOUNTING
FIRM ADMINISTRATION REPORT

2017 survey and analysis conducted by: The Platt Group / INSIDE Public Accounting
The Independent Gold Standard of Accounting Firm Benchmarking Since 1990

Published by:
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Carmel, IN 46032
(317) 733-1920 P (317) 663-1030 F
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2017 PRICING

$499 (PDF Copy) Firm Administration
$999 (Package PDF) Firm Administration, Human Resources and Information Technology

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INSIDE PUBLIC ACCOUNTING – (ISSN 0897-3482)
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THE 2017 FIRM ADMINISTRATION REPORT

The annual INSIDE Public Accounting Firm Administration Report is an independent, up-to-date set of economic and management statistics available about the accounting profession.

“An organization’s ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage.” – Jack Welch

IPA’s Methodology: Each survey is reviewed and examined. If data appears to be incorrect or questionable, we resolve issues with the reporting firm. While we do everything possible to ensure accuracy, the participating firms bear the ultimate responsibility for providing accurate data.

Throughout this report, all tables are presented by revenue bands and geographic regions. IPA does not provide data on any individual firm.

TERMS AND DEFINITIONS

Non-Big 4: This category includes all participating firms and includes all national firms, but excludes Big 4 firms.

Averages: The averages included in this report are averages of data supplied by survey participants. In some instances, the averages may not appear to total correctly; this is a function of rounding. All data excludes the Big 4.
We extend our gratitude to the 153 firms that participated in the seventh annual IPA Firm Administration survey. Managing partners, firm administrators, controllers, office managers and others all played a part in gathering the required data for the survey. We appreciate your efforts and flexibility, your input and suggestions for improvement, and your willing cooperation in ensuring accurate and timely submissions.

Maintaining confidentiality is a responsibility we at INSIDE Public Accounting take very seriously. That uncompromising commitment is the foundation of our business, and we appreciate the trust you have placed in our company.

We hope you will find value in this report.

Please remember IPA can also serve as a resource as you review benchmarking and performance improvement opportunities. Consider inviting IPA to make a customized presentation at your next partner retreat. IPA can delve deeper into the trends and provide detailed information on specific areas of interest.

We look forward to continuing to serve you and the profession, and with your feedback and suggestions, we strive to improve this report every year. Feel free to contact us.

Email us at mplatt@plattgroupllc.com or kplatt@plattgroupllc.com to see how the lessons learned from hundreds of firms can be used to improve performance at your firm.

Mike & Kelly Platt
SUMMARY HIGHLIGHTS

Publishers’ Note: Unless otherwise noted, all commentary relates to non-Big 4 firms, but includes all participating national firms. Not all firms chose to answer all questions. Percentages cited in the following pages/tables are based on firms that answered those specific questions.

OVERVIEW

The firms that participated in the 2017 IPA Firm Administration survey include:

- 44 Firms above $30 Million
- 29 Firms between $20 Million and $30 Million
- 50 Firms between $10 Million and $20 Million
- 30 Firms under $10 Million

SUCCESSION PLANNING

Succession plans for managing partners/CEOs are in place at 45% of all firms. In the firms above $75 million, 88% have a succession plan, while none of the participating firms below $3 million report having a succession plan in place for their managing partner and/or CEO.

Only 7% of all firms have a succession plan for high-level administrative staff. No firm below $15 million reports a plan for these individuals.

DECISION-MAKING

In all but the smallest firms, the dominant form of governance remains management by executive committee, with 73% of all firms above $5 million reporting that as the preferred governance structure.

Firms below $5 million are predominantly run by the managing partner, with 50% of reporting firms indicating this as the preferred governance structure.
“Is your firm’s decision-making process more like a partnership or a corporation?” The answers show that 59% of all firms view their firm acting more like a partnership, but 69% of the $30 million to $75 million firms indicate that they take a more corporate approach to management.

**INTERNAL ADMINISTRATIVE STAFF**

Thirty-eight percent of participating firms report a firm administrator on staff. Of those, 74% provide an annual bonus.

The average salary is $117,647 with the highest regional average in the Northeast at $152,666.

For firms above $30 million, 54% report having a chief operating officer on staff, with an average salary of $251,130.

Training directors are now employed by 23% of all firms. In firms above $30 million, that number jumps to 54%.

Firms above $30 million are employing more social media staff this year, with 48% of firms of this size reporting they have someone dedicated to this area. Overall, 19% of all firms have social media staff, up from 16% last year. The average salary of a social media staff member is $60,579.

Business development directors are now in place in 29% of all firms, and that percentage rises to 50% of all firms above $30 million. The average salary is $178,620, with 69% also receiving a bonus.

Use of sales staff hasn’t yet caught on in the Northeast, but 21% of participating firms in the Great Lakes report employing a dedicated sales person or team. Overall, 14% of all firms and 31% of firms above $30 million have this position in place.
REVENUE GROWTH

Organic growth averaged 5.3% and growth including mergers averaged 7.0% across all firms that participated in the 2017 IPA Annual Survey and Analysis of Firms.

Primary reasons attributed by participants for their growth include:

- Organic Growth
- Mergers / Acquisitions
- Economic Conditions
- New Service / Niche Launched
- Addition of New Partner(s) – Lateral Hires

While there are many innovative ways to increase revenue (adding partners, developing new services, creating new niches), the primary methods are organic growth and merger activity. In the largest firms – those above $30 million – 29% report acquisition activity as the dominant driver of revenue change.

Economic conditions were identified as a major factor in revenue changes among smaller firms, those between $3 million and $15 million, with 14% citing this as their primary reason. Very few firms identified “significant increase in billing rates” as a primary reason for growth. Fees are remaining steady.

Firm leaders were also asked to cite a secondary reason for revenue changes, and many indicated economic conditions, which could be positive or negative depending on numerous factors.

Firm leaders are feeling good about the economy, with 98% reporting either neutral or positive views. They believe their clients share these beliefs, with only 5% of firms reporting their clients have a negative outlook. Estimated growth for the next reporting period for all non-Big 4 firms is a healthy 7.3%.
NEW BUSINESS OPPORTUNITIES

All firms have strategies for generating more business in the coming year but they vary depending on the firm. Thirty percent of all participating firms are looking to increase value-added opportunities with existing clients. Other strategies: looking for firms to acquire (15%), creating new services (14%), increasing proposals in the pipeline (11%) and increasing networking opportunities for staff (11%).
One in four firms in the $30 million to $75 million revenue band indicate that their main strategy for generating new business is to create new services. These firms are primarily headquartered in the Northeast, Great Lakes and Great Plains. Overall, just 14% of firms identified new services as the top strategy for new business growth.

**BUSINESS DEVELOPMENT INCENTIVES**

Firms acknowledge that they want staff looking for new business opportunities, whether it comes in the form of new clients or additional services to existing clients. Sixty percent of firms offer incentives for bringing in new clients for 0- to 2-year staff and 3- to 5-year staff. More than half the firms offer these incentives for all experience levels.

Fifteen percent of all firms report they offer extra incentives to equity partners for bringing in new clients. Philosophically, many may argue that business development is the responsibility of all partners, is part of the partner compensation expectations and should be a prerequisite for admittance into partnership.

More than half of participating firms rate their incentive program as “good” or “excellent,” but 16% believe their program is “fair” or “poor.” The other 27% consider their program “average.” Offering an excellent incentive program could be a differentiator for your firm.

**MEASURING PROFITABILITY**

Measuring profitability beyond the firmwide number can identify strengths and weaknesses inherent in the client base and staff. Consider the following percentage of firms and their means of tracking profit margin – table to the right.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Tracking Method</th>
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<tr>
<td>70%</td>
<td>By Department</td>
</tr>
<tr>
<td>66%</td>
<td>By Office</td>
</tr>
<tr>
<td>65%</td>
<td>By Client(s)</td>
</tr>
<tr>
<td>52%</td>
<td>By Staff</td>
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</table>
SHARING METRICS WITH STAFF

For several years, IPA has tracked firms’ level of transparency regarding sharing key metrics with staff. According to IPA’s 2016 Road to Retention report, young professionals are eager to know if the firm is profitable, growing and on track with partners’ financial expectations. Firms want their staff to serve as business advisors, which requires a good understanding of the key performance indicators of their client businesses. IPA data shows, however, that philosophical differences exist on the types of firm performance indicators that should be shared with staff.

Percentage of Firms That Share Select Metrics with ALL Staff
Source: INSIDE Public Accounting 2017

<table>
<thead>
<tr>
<th>Metric</th>
<th>Firms &gt; $20 Million</th>
<th>Firms &lt; $20 Million</th>
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<tbody>
<tr>
<td>Revenue</td>
<td>71%</td>
<td>36%</td>
</tr>
<tr>
<td>Utilization</td>
<td>39%</td>
<td>26%</td>
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<tr>
<td>Realization</td>
<td>36%</td>
<td>34%</td>
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<tr>
<td>Revenue per hour</td>
<td>23%</td>
<td>16%</td>
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<tr>
<td>Profit margin</td>
<td>18%</td>
<td>16%</td>
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<tr>
<td>Firmwide net income</td>
<td>10%</td>
<td>3%</td>
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BILLING MULTIPLE

Twenty-nine percent of firms over $30 million have a billing multiple of 3.0 to 3.4 (times hourly salary of professional staff). Forty-seven percent of firms between $10 million and $30 million report using a billing multiple between 3.0 and 3.9. The smallest firms, those under $10 million, are more aggressive, with 70% reporting using a billing multiple between 3.5 and 4.9.

AVERAGE BILLING RATE MULTIPLE

Source: INSIDE Public Accounting 2017

![Average Billing Rate Multiple Chart]

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<th>2.5 - 2.9</th>
<th>3.0 - 3.4</th>
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<td>26%</td>
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<td>11%</td>
<td>11%</td>
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FIRM GOVERNANCE

Firms utilize different governance tools, based on their size and complexity. The following graph highlights the top 10 tools in order of the largest differential between percentage use at the largest firms and percentage use at the smaller firms.

![Graph showing the top 10 governance tools by size of firm](graph.png)

WELCOME TO INSIDE PUBLIC ACCOUNTING

About Us

The Platt Group/INSIDE Public Accounting provides firm leaders with innovative concepts to improve their firms.

The Platt Group publishes two award-winning publications: the subscription-based INSIDE Public Accounting newsletter and the annual IPA Benchmarking Report. These tools, along with other benchmarking tools, assist leaders in shaping their firms towards being not only more efficient, growth-minded and profitable, but also forward-looking, innovative and attractive to a new generation of professionals.

The Platt Group is dedicated to helping firm leaders, and their firms, achieve their ultimate potential. Whether they are researching the latest trends, benchmarking the leading firms, or working with leaders to share and garner knowledge, we are always looking for ways to help.

Kelly Platt and Mike Platt
Principal, The Platt Group / INSIDE Public Accounting

“I have subscribed to INSIDE Public Accounting for more than 10 years. They are one of the best sources for breaking industry news, articles, practice management analysis and best practices within the profession. All firm leaders should consider IPA as a trusted advisor in the industry.”

– Jamie Ellis
Katz Sapper & Miller
What Makes INSIDE Public Accounting Unique

INSIDE Public Accounting is different than other publishing companies. IPA’s annual award-winning National Benchmarking Report and the monthly newsletter has earned it the respect of the top minds in the accounting profession and remains independent from outside governing bodies.

For close to four decades, firm leaders have entrusted IPA with their firms’ financial and operational data to compile one of the longest-running, most comprehensive benchmarking studies within the profession. More than 575 accounting firms participate annually in IPA’s benchmarking survey, which benchmarks firms ranging in size from more than $1 billion to $1 million across North America.

The survey is the basis of all that is done at IPA, as it provides the information that is analyzed in the benchmarking report and in newsletter articles that aim to help leaders push their firms to grow, become more profitable and better serve their clients.
INSIDE Public Accounting’s Survey & Analysis of Firms

Gain your competitive advantage and grow your firm with industry insight from the independent benchmarking leader in the nation.

WHY THE IPA SURVEY?

a) Independent third-party verification of data.
b) Streamlined data collection alleviates survey fatigue and frees up staff for other high-value activities.
c) Apples-to-apples comparisons.
d) Ongoing analysis is available to all participants, including international firms.

WHAT YOU CAN EXPECT

a) All confidential firm data, including salaries, compensation, income, etc., will be held in strict confidence.
b) IPA conducts a thorough review of each survey submission for commonly missed areas and for any and all errors.
c) The opportunity to be included in the largest annual management of an accounting practice (MAP) survey in the country. Your firm will be benchmarked with more than 570 firms and may be ranked among this year’s top firms in the IPA 100, IPA 200, IPA 300 and the coveted IPA Best of the Best Firms in the nation.
d) A complimentary copy of the August issue of the award-winning INSIDE Public Accounting newsletter. This issue highlights the annual IPA 100 firm rankings, along with a detailed financial and operational analysis of the rankings.
e) An electronic complimentary copy of the Executive Summary of the IPA National Benchmarking Report. If you participate in the Internal Operational surveys, you will also receive a complimentary executive summary when published in September.
f) You will receive preferred pricing on the IPA National Benchmarking Report, the Internal Operational Reports and other benchmarking items.
g) You will get preference for selection in articles written by IPA throughout the year. This is an excellent opportunity to market your firm.
INSIDE Public Accounting’s Internal Operational Reports

Dive deeper into the inner-workings of firms across the nation. Uncover trends, compensation data, benefits offered, key process and policies, along with the newest technology / software that firms are utilizing to take them into the future.

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- Firm Administration Report
- Human Resources Report
- Information Technology Report
INSIDE Public Accounting’s
Financial and Operational Report Card

The INSIDE Public Accounting Financial and Operational Report card is a one-page snapshot of your firm’s overall performance in 22 metrics compared with 587 survey participants, firms in your revenue band and the IPA Best of the Best firms. The Report Card – broken out by top, middle and bottom quartile – allows you to quickly see where your firm is doing well and the areas that may need extra attention.
The Subscription-Based Monthly Newsletter

The Award-Winning Newsletter for The Innovative CPA Firm

The IPA subscription-based monthly newsletter features trends, strategies and next practices that public accounting firms are using to move from idea to execution. You will find in-depth interviews with leaders of the Best of the Best firms, most-admired peers, and the top influencers around the country and the globe.

Complimentary Samples

IPA features information on benchmarking trends, practice management and, of course, the latest breaking news. IPA’s goal is to inform firm leaders of successful strategies to help their firms succeed. Turn information into action with IPA.

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SAMPLE REPRINT BELOW
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“IPA provides an in-depth view of the profession. The monthly articles provide timely information, which helps to keep me and my firm up-to-date with trends and how we can benefit from the ongoing change in the profession.”

“During times of change, firms can’t get an accurate gauge of performance by comparing to years past, so tools like the IPA National Benchmarking Report are more important than ever.”

“IPA is a leading industry source of information through its newsletter, the PRIME Symposium, and the benchmarking report for many years by providing everyone in the industry with timely news on what’s happening in the industry...from mergers to other key developments, trends, sound perspectives, future expectations and advice for sound practice management.”

"I love the profession and completely respect The Platt Group and INSIDE Public Accounting for their consistent contribution to make our profession better. I refer firm leaders to the IPA benchmarking report and appreciate the in-depth reviews and analysis of data from firms across our profession."

“Thank you for all you do for our profession. We truly appreciate the data, articles and ongoing news.”

Contact Us

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(317) 663-1030 F

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INSIDE Public Accounting’s readership delivers a targeted group of managing partners, Best of the Best firms and thought leaders within the profession. IPA readers are responsible for strategic business decisions that directly impact the success and growth of their firms. You can reach this exclusive group with IPA’s monthly newsletter, online options, annual reports, conferences or a customized plan for key market coverage. Contact editor@plattgroupllc.com for more info.

Why IPA?

- Reach the decision-makers at small, mid-size and large firms across the nation.

- Deliver your message alongside highly sought after reviews and articles accounting firm professionals rely on for best practices.

- Combine web, monthly newsletters, E-News updates, webinars, custom research and other products to enhance your message.

- Build awareness, engagement and sales leads through targeted campaigns.
## 2017 BENCHMARKING TOOLS
THE NATIONAL BENCHMARKING REPORT

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<tr>
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<tr>
<td>Print Report</td>
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### THE IPA FINANCIAL & OPERATIONAL REPORT CARD*

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<td>Print and PDF Single-User</td>
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