THE INSIDE PUBLIC ACCOUNTING
FIRM ADMINISTRATION REPORT

EXECUTIVE SUMMARY

2018

REDEFINING BUSINESS

EXCERPTED IN PART
THE ANNUAL
INSIDE PUBLIC ACCOUNTING
FIRM ADMINISTRATION REPORT

2018 survey and analysis conducted by: The Platt Group / INSIDE Public Accounting
The Independent Gold Standard of Accounting Firm Benchmarking Since 1990

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THE 2018 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.

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

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. In some instances, the averages may not appear to total correctly; this is a function of rounding.
We extend our gratitude to the 132 firms that participated in the eighth 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
EXECUTIVE SUMMARY

SUMMARY HIGHLIGHTS

The firms that participated in the 2018 IPA Firm Administration survey include:

43  Firms above $30 Million
26  Firms between $20 Million and $30 Million
41  Firms between $10 Million and $20 Million
22  Firms under $10 Million

DECISION-MAKING

In all firms, the dominant form of governance remains management by executive committee, with 73% of all firms reporting that as the preferred governance structure.

The survey asked, “Is your firm’s decision-making process more like a partnership or a corporation?” The answers show that 60% of all firms say the process is more like a partnership, but 72% of the $30 million to $75 million firms indicate that they take a more corporate approach to management.
EXECUTIVE SUMMARY

SUCCESSION PLANNING

Succession plans for managing partners/CEOs are in place at 46% of all firms. In the firms above $75 million, 89% have a succession plan, while only 20% of the participating firms below $5 million report having a succession plan in place for their managing partner and/or CEO.

Thirteen percent of all firms have a succession plan for high-level administrative staff up from 7% last year.

INTERNAL ADMINISTRATIVE STAFF

Thirty-two percent of participating firms report a firm administrator on staff. Of those, 76% provide an annual bonus. The average salary is $116,940 with the highest regional average in the Northeast at $154,969.

For firms above $30 million, 55% report having a chief operating officer on staff, with an average salary of $227,977.

Training directors are now employed by 26% of all firms. In firms above $30 million, that number jumps to 62%.

Firms above $20 million are employing more social media staff this year, with 31% of firms of this size reporting they have someone dedicated to this area. Overall, 16% of all firms have social media staff. The average salary of a social media staff member is $62,247.

Business development directors are now in place in 27% of all firms, and that percentage rises to 40% of all firms above $30 million. The average salary is $186,568, with 67% also receiving a bonus.

Use of sales staff isn’t common in the Great Plains with only 5% of firms reporting that they employ sales staff. Overall, 13% of all firms and 26% of firms above $30 million have this position in place.
REVENUE GROWTH

Organic growth averaged 4.6% and growth including mergers averaged 6.6% across all firms that participated in the 2018 IPA Annual Survey and Analysis of Firms.

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 - 22% report acquisition activity as the dominant driver of revenue increases.
EXECUTIVE SUMMARY

Primary reasons attributed by participants for their growth include:

Economic conditions were identified as a major factor in revenue changes among smaller firms, those between $5 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.

Twenty-two percent of firm leaders cited economic conditions as the secondary reason for increased revenue growth last year.

NEW BUSINESS OPPORTUNITIES

Firms have varying strategies for generating more business in the coming year, with 42% looking to increase value-added opportunities with existing clients.

Other strategies are: looking for firms to acquire (12%), creating new services (10%), increasing proposals in the pipeline (10%) and increasing relationships with lawyers, bankers, trade associations, etc. (10%).

One in four firms in the $50 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 10% of firms identified new services as the top strategy for new business growth.
BUSINESS DEVELOPMENT INCENTIVES

Firms want staff looking for new business opportunities, whether it comes in the form of new clients or additional services to existing clients. Sixty-four 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.

Seventeen 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 22% believe their program is “fair” or “poor.” The other 25% 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.

- 71% By Department
- 68% By Client(s)
- 61% By Office
- 49% By Staff
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.

Source: The 2018 IPA National Benchmarking Report
SCHEDULED FOR MAY 2019

APPLY FOR THE 2019 IPA EXCELLENCE IN FIRM CULTURE AWARD.

IPA is excited to announce the addition of the Excellence in Firm Culture survey and corresponding award to the portfolio of our services.

For decades, IPA has been a trusted resource to firms with innovative concepts to improve their firms. Our mission continues to be to assisting firm leaders in making their firms more efficient, growth-minded, profitable and forward-looking.

Whether we are researching the latest trends, benchmarking the leading firms, surveying key staff, or working with leaders to share and garner knowledge, we are always looking for ways to help firms achieve their potential.

APPLY TODAY

https://tinyurl.com/ipaculture

There is no cost, or commitment to submit your application.
### GOVERNANCE

#### STRUCTURE OF CONSULTING

Consulting is Structured As…

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<th>A Service Offering that can fit in other Departments</th>
<th>A Separate Department / line of Business</th>
<th>A Separate Entity</th>
<th>Separate P&amp;L's</th>
<th>Included in Overall Firm P&amp;L</th>
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Does the consulting arm have separate P&L's or is it included in the overall P&L of the firm?

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<th>FIRM SIZE (Net Revenue)</th>
<th>61%</th>
<th>36%</th>
<th>3%</th>
<th>12%</th>
<th>88%</th>
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<tr>
<td>All Non-Big 4</td>
<td>53%</td>
<td>41%</td>
<td>6%</td>
<td>18%</td>
<td>82%</td>
</tr>
<tr>
<td>&gt;$75 Million</td>
<td>33%</td>
<td>44%</td>
<td>22%</td>
<td>33%</td>
<td>67%</td>
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<tr>
<td>$50-$75 Million</td>
<td>56%</td>
<td>44%</td>
<td>0%</td>
<td>19%</td>
<td>81%</td>
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<tr>
<td>$30-$50 Million</td>
<td>62%</td>
<td>38%</td>
<td>0%</td>
<td>8%</td>
<td>92%</td>
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<tr>
<td>$20-$30 Million</td>
<td>63%</td>
<td>37%</td>
<td>0%</td>
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<td>100%</td>
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<tr>
<td>$15-$20 Million</td>
<td>84%</td>
<td>16%</td>
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<td>$10-$15 Million</td>
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<th>45%</th>
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<td>33%</td>
<td>10%</td>
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<td>0%</td>
<td>7%</td>
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<td>Northeast</td>
<td>61%</td>
<td>33%</td>
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<td>22%</td>
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<tr>
<td>Great Plains</td>
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<td>43%</td>
<td>0%</td>
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<td>86%</td>
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About Us

The Platt Group / INSIDE Public Accounting (IPA) 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 publications, along with other benchmarking tools, assist leaders in making their firms more efficient, profitable, innovative, forward-looking and attractive to a new generation of professionals.

INSIDE Public Accounting is dedicated to helping firm leaders, and their firms, achieve their ultimate potential. Whether we 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
Principals, 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 collects and analyzes more financial and operational data than anyone in the public accounting profession. IPA is the independent leader for the profession, and is not tied with a consulting or association division.

Firm leaders have trusted IPA with their firms’ financial and operational data for more than 30 years to compile one of the longest-running, most comprehensive benchmarking (MAP) reports within the profession. Annually, hundreds of firms participate in IPA’s survey, which benchmarks firms ranging in size from $1 million to $1 billion across North America. IPA’s annual award-winning National Benchmarking Report and the monthly newsletter have earned the respect of the top minds in the industry.

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.

Clients

570+ Accounting Firms
13,000 Accounting Firm Partners
IPA 100 – The Big 4 firms and firms above $37 million in net revenue
IPA 200 – Firms ranging from $37 million to $16 million in net revenue
IPA 300 – Firms ranging from $16 million to $10 million in net revenue

Partner Intl. Associations

Alliott Group / CPAmerica / DFK International / HLB International / INPACT Americas / LEA Global / Moore Stephens North America / PrimeGlobal

Audience

Managing Partners
Partners and Owners
CEOs, COOs and CFOs
Administrators
Consultants and Educators

Advertisers

Consultants
Vendors
Associations
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.

The IPA Annual Survey and Analysis of Firms is one of the longest-running and most comprehensive Management of an Accounting Practice (MAP) surveys in the U.S. The survey is open to all firms in North America and launches in January every year. All data collected, including salaries, compensation, income, etc., will be held in strict confidence.

Participants are benchmarked against more than 570 firms and may be ranked among this year’s IPA 100, IPA 200, IPA 300 and the coveted IPA Best of the Best firms in the nation.

ADVANTAGES OF SURVEY PARTICIPATION

- A complimentary copy of the August issue of the IPA newsletter. This issue highlights the annual IPA 100, IPA 200 and IPA 300 firm rankings, along with a detailed financial and operational analysis of the rankings.

- A complimentary electronic copy of the Executive Summary of the IPA National Benchmarking Report. If you participate in the Internal Operational survey(s), you will also receive a complimentary executive summary when published in September.

- Preferred pre-publication pricing on the IPA National Benchmarking Report, the Internal Operational Reports and other benchmarking items including the Financial and Operational Report Card.

- Preference for selection in IPA articles throughout the year. This is an excellent opportunity to market your firm and leaders.
INSIDE Public Accounting’s National Benchmarking Report

The result of the IPA Annual Survey and Analysis of Firms is the annual IPA National Benchmarking Report, which is one of the longest-running, most complete, independent sets of economic and management statistics available about the profession.

The national report includes aggregated data on more than 300 data points analyzed and broken out by revenue bands and geographical locations.

Firms that fully participate in the annual IPA Annual Survey and Analysis of Firms receive a complimentary Executive Summary of the findings.

"At Smith & Howard, we use the IPA National Benchmarking Report for comparability with prior years to see how we can improve and help us focus on areas needing emphasis. We also look at favorable trends and be sure we are doing more of those things."

– John Lucht, MP, Smith & Howard

Association Partnerships

IPA is pleased to partner with some of the leading international associations to offer services, tools and resources not found elsewhere. Partner association members receive full access to the benchmarking report. If your association is interested in partnering with IPA, please contact survey@plattgroupllc.com.
INSIDE Public Accounting’s Financial and Operational Report Card

“GBQ has been avid subscriber to the IPA Financial & Operational Report Card which shows our ranking compared to all firms and firms of our size. We share this to let our associates know which of these metrics GBQ has been successful at compared to our peers, as well as those from which we need improvement. We also track our standing in these measures year by year to track the trend of these metrics compared to our peers. These metrics have been extremely valuable in not only assisting us in managing our business, but also giving our associates an understanding of the trends and benchmarks across the industry.”

– Shaun Powell, Director of Finance, GBQ Holdings
The Monthly Subscription-Based Newsletter

The Award-Winning Newsletter
for Leaders within the Accounting Profession

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.

Have news to share? Email editor@plattgroupllc.com with story ideas.

“As a subscriber, I find items extremely valuable and interesting information as we manage our firms. From Platt’s Perspective, to Top Consultants to the CPA Profession various thoughts, to interesting operational statistics to trends that are affecting our profession, the IPA newsletter is full of information that our firm uses.”
– Kelly Bernakevitch, Executive VP, MNP LLP
The INSIDER E-News Updates

The IPA INSIDER, INSIDE Public Accounting’s complimentary electronic e-newsletter, highlights information on firm mergers, partnership issues, benchmarking trends and other key developments in the ever-evolving, fast-paced profession.

Follow news on the top firms across North America, read profiles on thought leaders and stay up-to-date on results from IPA’s annual survey. Sign up today to the IPA INSIDER which is emailed directly to you a few times a month.

Sign up here to receive our e-newsletter
Celebrate Your Success

If your firm receives an IPA accolade, or is featured in an IPA article - **CELEBRATE**.

IPA is happy to provide you with complimentary imagery for use firmwide, and for a fee you can receive customized reprints with unlimited publishing rights to distribute to clients, to use in marketing materials, recruiting and more.

“Using IPA’s reprints is invaluable in the sales process. Not only does it provide the help in qualification that we need, but it also shows a third-party endorsement that is key to validating our place in the profession. Every single proposal we issue has IPA attached as a valuable piece of information for us and for the decision-maker.”

– Rob DeMartini, Marketing Director, Armanino LLP
What People Are Saying

“I love the profession and completely respect 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.” – Sam Allred, Director, Upstream Academy

“IPA has been an invaluable resource to me in the management of our firm over the last number of years. I have been educated on current industry trends and best practices through their monthly newsletter, annual benchmarking reports and attendance at their annual PRIME Symposium.” – Stephan Wasserman, MP, Gurney | Schneider

“Every year we look forward to hearing the latest IPA rankings of CPA firms across the US. The personalized reprints that the IPA team helps us craft each year are a great way for us to share our exciting news from year to year.” – Samantha Colladay, Director of Marketing, The Siegfried Group

Contact Us

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INSIDE Public Accounting’s readers are MPs, partners and consultants representing 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.

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, and other products to enhance your message.
- Build awareness, engagement and sales leads through targeted campaigns.
Who’s Behind IPA

**Kelly Platt**, managing partner of INSIDE Public Accounting and an owner in The Platt Group, has worked within the profession since 1994, Kelly has developed a deep understanding of the inner workings of CPA firms and is a co-founder of AccountingWEB.com. Kelly directs all aspects of IPA’s monthly IPA newsletter and the annual IPA survey and analysis of firms.

Email: kplatt@plattgroupllc.com

**Mike Platt**, managing partner of The Platt Group, has been working with firms since 1985. Mike has assisted large local and regional firms across North America grow and thrive. Mike brings successful ideas, approaches and information to firms across the globe. A sought-after presenter, Mike specializes in benchmarking trends and analysis, and partner retreat facilitation.

Email: mplatt@plattgroupllc.com
## 2018 Benchmarking Tools

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<th>Tool</th>
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<tr>
<td>PDF Report</td>
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<tr>
<td>Print Report</td>
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<td>PDF &amp; Print Report</td>
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### IPA Financial & Operational Report Card*

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<td>Financial and Operational Report Card*</td>
<td>$859</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.

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

### Newsletter Subscriptions

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<th>Type</th>
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<td>Print Single-User</td>
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<td>Print and PDF Single-User</td>
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<td>Firmwide PDF</td>
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