

The Attributes of High Value Firms

Course Outline

- Why continuously adding value is important to your firm's future success and succession planning. Why you may not have a choice if your firm is seeking to avoid an upward merger.
- Overcoming obstacles of the changing CPA firm profession's "Perfect Storm" (growing consolidation at all size firms, succession planning issues, unfunded partner retirement buy-outs, lack of quality staff, etc.) by adding value to your practice.
- It's all about leadership, investment, innovation, accountability and implementation. How to stop being in denial and quit making excuses in order to create more value and increase profitability.
- The dynamic CPA Firm landscape and facing the challenges of future competition for clients and quality professional staff. Where your firm needs to be on the value curve 3-5 years from now. Where does your firm currently stand in its life cycle?
- 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. How to drive value and profitability in a challenging competitive environment.
- The most overlooked and underrated profitability issues and how to change bad habits and culture.
- Promoting your firm's true value proposition to prospective merger candidates, partners and professional staff.
- Building a firm infrastructure and using the leverage of the traditional firm pyramid to increase profitability.
- Using evaluations from clients and staff to determine the changes necessary to increase value in your firm.