

## **Executive Development Program for CPA Managing Partners**

At Gatto Associates, we have spent years developing an Executive Development Program for CPA Managing Partners and Partners in Charge. You can now take advantage of this rigorous program, taught by distinguished faculty, and consisting of three sessions of two days each, beginning in June of 2008 and continuing through June of 2009.

During these sessions, you will learn approaches on how to:

- Identify the skills of successful managing partners;
- Identify each participant's abilities through upward evaluation;
- Carry out firm analysis and evaluation;
- Identify a process to evaluate partner and partner-to-be;
- Present the skills needed to lead a firm;
- Examine key attributes of a successful firm;
- Utilize executive one-on-one coaching (virtual coaching).

We know of no other program that has been developed solely for CPA Managing Partners and includes the strategies and techniques for you to develop yourself and your CPA firm into highly successful entities.

We encourage you to join with us and other CPA managing partners in this program that could make a significant positive difference in your career and in your firm. Please review the attached information and call our program facilitator, Barb Mullen at 412-344-2277, to register.

Sincerely,

Rex Gatto, Ph.D.  
President  
Gatto Associates, LLC

## *Executive Development Program for CPA Managing Partners and Partners in Charge*

**Where do Managing Partners and Partners in Charge of offices turn for advice and to confidentially discuss firm issues?** They attend an exclusive one-of-a-kind training with a cadre of professionals who understand what they do.

### **Why is this Program different than all of the others?**

We mentor and coach each individual between sessions in a practical way to help him/her implement what was learned. Even at the end of the program, we will offer you the opportunity to receive coaching and to review your development a year later.

Each session will provide you with key learnings that are to be implemented before the next session. We walk with you through an individual change process.

This is not a one-size-fits-all approach to managing partner development. This program is customized with interactive sessions with the instructors and partners from other firms. We will have round table discussions so you will be able to ask questions to get straightforward answers. The virtual coaching is your opportunity to have a one-on-one meeting with one of our instructor coaches.

The Executive Development Program process will give you the opportunity to network, talk with people who are doing and have done what you do, and talk with leadership experts in guiding and leading your firm.

**Who should attend?** This program has been designed for managing partners with a firm size of 25 to 150 people or gross billings of \$3 million to \$20 million in revenues. This is for:

- **Managing Partners** who want to review, contemplate, and seek innovative ways of leading their firms;
- **New Managing Partners** who are beginning the process of firm leadership;
- **Partners** who will be transitioning to Managing Partner or are in a firm leadership position other than managing partner (COO or CFO);
- **Partners in Charge** of an office who want to review, contemplate, and seek innovative ways of leading the office and better work with the other firm executives.

If you have a question as to whether this program is right for you call, Rex Gatto 412-344-2277.

## I. Program Overview

The objective of the Managing Partner Executive Leadership Development Program is to help each managing partner:

- Identify the skills of successful managing partners;
- Identify each participant's abilities through upward evaluation;
- Carry out firm analysis and evaluation;
- Identify a process to evaluate partner and partner-to-be;
- Present the skills needed to lead a firm;
- Examine key attributes of a successful firm;
- Utilize executive one-on-one coaching (virtual coaching).

In today's competitive market, what distinguishes one firm from another? It is not the software or accounting knowledge; it is the relationship built between the client and CPA, and relationships in the office. As a managing partner, you know there are many factors that cause your firm to be successful. This program will explain in very clear terms what successful firms do based on five functional areas.

Analysis of the Five Functional areas within a firm contains the following:

- Practice management (day-to-day operations);
- Human Resources (recruiting, retentions and development);
- Business Development;
- Client Services;
- Quality Control.

**Outcomes:** All participants will gain confidence in how they lead their firms, meeting the challenges of leading different generations, working with different types of partners, and building successful firms.

**Personal Learning Objectives** will be achieved by:

- Customized approaches to firm leadership;
- Upward Evaluation;
- Firm assessment;
- Learning to define and work with different partner personalities;
- Effectively presenting partner evaluation and development;
- Learning how to effectively lead day to day operations;
- Building a business vs. providing accounting services;
- Networking with people who know what you do.

**Topics and themes** to be presented are:

- Creating and leading a healthy firm;
- Leading change;
- Developing the next generations of leaders/succession planning;
- Visioning and managing change/practice management;
- Mentoring Process for the firm/succession planning;
- Developing marketing/selling skills/business development;
- Motivation and self-managing skills;
- Developing organizational skills;
- A leader's role in firm profitability.

## II. Developmental Methods

### Program Objectives:

- Develop an understanding for people within your firm/related issues
- Analyze and benchmark best managing partner/practice management
- Create network opportunities, sharing ideas with other managing partners
- Develop communication firm wide
- Develop an approach to creating change in your firm
- Write a strategic action plan
- Learn to effectively and calmly deal with difficult partners

**CPE Credit:** CPE credit is subject to approval by individual state boards of accountancy. Gatto Associates, LLC, is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors, sponsor number 106031. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. NASBA telephone: 615-880-4200.

**Enrollment:** there will be a limit of twenty-five participants to ensure personal and individualized development for each managing partner. Daily activities will be set for attending spouses. Spouses are welcome to attend the networking dinners.

## III. Presenters

**Rex Gatto, Ph.D.** a business psychologist who has worked with CPA firms for twenty years in the United States and Canada, is a presenter and has designed assessments specifically for CPA firms and managing partners. He has authored five leadership and business related books and many articles. He will focus on the development of people and firm leadership.

**Bob Gallagher, CPA** is a seasoned practitioner and former managing partner. He has authored *Merging Your CPA Firm*. Bob has been a consultant to CPA firms for the past twenty-five years, giving presentations throughout North America and Europe on operations and firm development.

**Barry Braun, CPA** is a seasoned practitioner, retired partner and managing partner with Goldenberg Rosenthal, LLP in Philadelphia, PA. He will speak on partner evaluation, development, and establishing niches in your firm.

**Jack Suttle, CPA** is a seasoned practitioner and retired founder of Suttle Stalnaker, PLLC, Charleston, WV. He will speak about practice development and the inner operations development in a firm.

**Todd Mitchell, CPA** is the Chairman of Elliott Davis. His topics of interest coincide with his leading the initiative to acquire firms he has have given presentations on women in leadership positions within the firm.

**Ron Kearns, CPA** is a former partner and managing partner of Smith Elliott and Kearns Company, LLC located in Pennsylvania and Maryland. He will speak on mentoring initiatives and development of the talent within the firm.

## IV. Course Outline

### Required Reading

Over the course of the program, there will be a series of books and case studies that participants will be asked to read.

### *Preparation:*

Books and reading assignments are to be purchased (on Amazon.com or in your local bookstore) in advance of all meetings. The books are:

- Management Challenges for the 21<sup>st</sup> Century - Drucker (first session)
- Winning - Jack Welch (second session)
- Built to Last - Jim Collins (third session)
- Case studies and articles to be provided (all sessions)

Required readings are to be completed **before** class.

Each participant will complete an upward managing partner 360° feedback assessment which has been designed specifically for managing partners. The participants will complete the assessment in June of 2008, as a pre-assessment, and in June 2009 as a post-assessment to measure developmental change.

**Each participant will be asked to outline three goals** of personal and professional development to focus on during this developmental process. There will be continual checks to ensure those goals are achieved.

## Session 1 Day I

A.M	P.M.
360 Firm Leadership Feedback Report Key Characteristics of a Managing Partner <ul style="list-style-type: none"><li>• Identified characteristics of successful managing partners</li><li>• Upward Evaluations on each participant to benchmark against characteristics of Successful Managing Partners</li></ul> Instructor: Rex Gatto	Building a Healthy Firm <ul style="list-style-type: none"><li>• All of the components of the firm of the future</li><li>• Firm surveys on each participant's firm to benchmark against the Healthy Firm</li><li>• Developing your firm based on how it is niched or structured</li></ul> Instructors: Rex Gatto and Barry Braun

**Evening: Networking dinner: spouses welcome**

**Day II**

<b>A.M</b>	<b>P.M.</b>
Practical Advice from Former Managing Partners <ul style="list-style-type: none"> <li>• Practice Management</li> <li>• Human Resources (day-to-day operations)</li> <li>• Business development</li> </ul> Instructor: Jack Suttle	Practical Advice from Former Managing Partners <ul style="list-style-type: none"> <li>• Client Services</li> <li>• Quality Control</li> <li>• Panel Discussion by the presenters address questions by the participants</li> </ul> Instructors: Rex Gatto, Jack Suttle and Barry Braun

Each participant will have an individual hour of coaching between each session.

**Virtual Coaching**

Between Session 1 & 2:

A one-hour coaching session focusing on:

1. The managing partner's development and implementation of firm enhancements
2. Firm's vision, mission and long-range goals.
  - Practice philosophy
  - Service goals
  - Practice development goals
  - Firm's future vision
3. Personnel policies
  - Recruiting and hiring
  - Goal setting, evaluation and advancement process
  - Succession planning

If requested, the coach can visit on site. (Fees would need to be discussed individually.)

## Session 2 Day I

A.M	P.M.
Development the Next Generations of Right Partners <ul style="list-style-type: none"> <li>• Why keep your firm, why not sell?</li> <li>• Right Partners vs. Toxic Partners</li> <li>• Innovation within the firm</li> </ul> Instructor: Rex Gatto	Creating Firm Change the right way <ul style="list-style-type: none"> <li>• Change Process within the firm to benchmark against firm that have undergone successful change</li> </ul> Instructor: Bob Gallagher

**Networking dinner: spouses welcome**

## Day II

A.M	P.M.
Developing Partners Through Mentoring <ul style="list-style-type: none"> <li>• What is mentoring?</li> <li>• Developing partners and continuing to help them grow</li> </ul> Instructors Rex Gatto and Ron Kearns	Preparing Your Firm for Continued Continuity and Change <ul style="list-style-type: none"> <li>• Organized Change</li> <li>• Continuity of Success</li> <li>• Panel Discussion</li> </ul> Instructors: Rex Gatto, Bob Gallagher and Ron Kearns

Each participant will have an individual hour of coaching between each session.

### Virtual Coaching

Between Session 2 & 3:

A one-hour coaching session focusing on:

1. The managing partner's development and implementation of firm enhancements
2. Partner effectiveness  
Partner contribution
3. Succession planning  
Developmental process for everyone in the firm

If requested, the coach can visit on site. (Fees would need to be discussed individually.)



## Meeting 3 Day I

<b>A.M</b>	<b>P.M.</b>
Identifying your successor <ul style="list-style-type: none"><li>• Creating a pool of candidates</li><li>• Differentiation, partner evaluation</li><li>• Key performance Indicator of being a partner</li></ul> Instructor: Rex Gatto	Day-to-day firm operations <ul style="list-style-type: none"><li>• Doing it the right way</li><li>• Benchmarking your firm toward success</li><li>• Appraisal of performance</li><li>• Business Development</li></ul> Instructors: Barry Braun and Jack Suttle

**Networking dinner: spouses welcome**

## Day II

<b>A.M</b>	<b>P.M.</b>
Development and Choosing the right partners <ul style="list-style-type: none"><li>• Process of career planning</li><li>• Creating a tier learning process</li><li>• Women in leadership positions</li></ul> Instructor: Todd Mitchell	Preparing your Firm for the Future <ul style="list-style-type: none"><li>• Defining the next firm years/managing firm values while creating change</li><li>• Creative possibilities for your firm</li><li>• Panel Discussion</li></ul> Instructors: Rex Gatto Todd Mitchell, Jack Suttle, and Barry Braun

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are needed to see the picture.

## **V. After the course is over**

Each participant will have the opportunity to continue the mentoring and coaching process with any of our presenters that they chose. We will help you continue to make a difference.

## **VI. Cost of the Program**

Participants fee is \$ 7,500 for the program.

Register on line @ [rexgatto.com](http://rexgatto.com) or call Gatto Associates at 412-344-2277 and ask for Barb.

## **VII. Program Dates:**

Session #1

June 26 and 27, 2008, Pittsburgh, PA

Sheraton Station Square, 888-627-7029

Session #2

October 23 and 24, 2008, Pittsburgh, PA

Sheraton Station Square, 888-627-7029

Session #3

June 25 and 26, 2009, Pittsburgh, PA

Sheraton Station Square, 888-627-7029