

# Managing Partners Partners-in-Charge Program



**Gatto** Associates, LLC.  
*www.rexgatto.com*

# Course Objectives

**Through workshops, webinars, and coaching sessions, you will learn to:**

- **Identify and develop the skills needed to be an effective Managing Partner/Partner-in-Charge of an office, service line or industry niche;**
- **Analyze and evaluate the contributions of products, service partners and staff;**
- **Identify your abilities through upward evaluation;**
- **Identify a process to evaluate current and prospective partners;**
- **Develop the skills needed to lead your firm;**
- **Examine key attributes of a successful firm;**
- **Identify how to mentor the next generation**
- **Utilize executive one-on-one coaching (virtual coaching).**



*At Gatto Associates, LLC we have spent years creating and refining our 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 two on-site workshops, 4 webinars and three one-hour coaching sessions. Our program begins in September, 2011 and continues through June, 2012. Through this program, participants will earn approximately 36 CPEs.*

*We know of no other developmental process of this caliber that has been created solely for CPA Managing Partners/Partners-in-Charge and Segment Leaders that includes the strategies and techniques for you and your firm to become highly successful and be prepared for now and the future. We will focus on the challenges and differences that face male and female firm leaders.*

*We encourage you to join with us and other CPA managing partners and partners-in-charge in this program that could make a significant positive difference in your career and in your firm. This program is affiliated with the CPA Leadership Institute.*

*Please review the following information and call our program facilitator, Jeff Cermak, at 412-344-2277 to register, or simply log in and register on line at <http://rexgatto.com/programs/managing-partner-senior-partner-program>.*

*Sincerely,*

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

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

**Why is this Program different from all of the others?** We mentor and coach all individuals between sessions in a practical way to help them implement what was learned. Even at the end of the program, we will offer participants the opportunity to receive coaching and to review their development a year later.

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

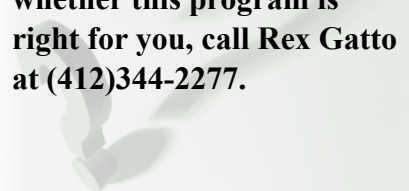
This is not a one-size fits-all approach to partner development. This program is customized with interactive sessions with instructors who have done what the participants do. We will have round table discussions so they will be able to ask questions and get straightforward answers. The virtual coaching is an opportunity to have one-on-one meetings with each of our instructor coaches.

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

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

- **Managing Partners** who want to review, contemplate, and seek innovative ways of leading their firms;
- **Partners-in-Charge** of an office and **Segment Leaders** who want to become more effective at achieving growth and profitability and are seeking creative ways of leading their people and working with other firm leaders
- **New Managing Partners** who have recently assumed a firm leadership role or who will be transitioning to Managing Partner

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



## **Program Overview:**

The objective of the Managing Partners/ Partners-in-Charge Executive Leadership Development Program is to help each person:

- Identify the skills of successful managing partners (leadership and communication);
- 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).
- Present key firm initiatives: governance, succession planning, mentoring, next generation attributes, compensation, practice development

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. Managing Partners and Partners-in-Charge know there are many factors that cause their firms to be successful. This program will explain in very clear terms what successful firms do based on five functional areas:

- 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. Each participant will earn approximately 36 CPEs for completion of the entire program.

### **Dates**

Onsite meetings: September 8 and 9, 2011, and June 7 and 8, 2012

Virtual Coaching to be assigned in October, 2011; January and March, 2012

Webinars: November 16, 2011; February 15, April 11, and May 16, 2012

## **Personal Learning Objectives:**

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:**

- 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;
- Explaining a leader's role in firm profitability.

## **Developmental Methods:**

### **Program Objectives:**

- **Develop an understanding for people issues and development within your firm**
- **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 plan**
- **Learn to effectively and calmly deal with difficult partners**

### **CPE Credit:**

**Participants in this program will acquire at least 36 CPEs.**

**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 participant.**

# PRESENTERS:



**REX GATTO, PH.D. :**

is a business consultant and lecturer, he has presented to business people throughout the United States and Canada and for many professional organizations. He received an outstanding speaker letter from the American Society of Training and Development acclaiming him as a dynamic and thought-provoking speaker. He has developed customized training workshops for many corporate 500 companies, CPA firms, hospitals, small businesses, universities and colleges, and has trained and facilitated all positional levels of business people. As a change interventionist, he has written and presented for business teams, corporations and helped people achieve an enriched, productive, and enjoyable work life.

[www.rexgatto.com](http://www.rexgatto.com)



**TIM MICHEL, CPA:**

is a former managing partner of a multi-office Top 100 CPA firm. He is founder and principal of Michel Consulting Group LLC and helps CPA firm owners create value in their practice by drawing on his own experiences to assist them in identifying and over-coming obstacles and focusing on opportunities to increase growth and profitability. His experiences include 30 years in CPA firm leadership roles including ten years as CEO during which time the firm's revenues tripled. While CEO, he was directly involved in the acquisition of five accounting practices, the creation of new services and the development of various leadership programs. Tim is a frequent presenter at management conferences and accounting firm association sessions. He specializes in partner retreat facilitation, development of actionable strategic plans, design of effective governance systems, partner compensation and accountability plans and succession planning.

[www.michelconsultinggroup.com](http://www.michelconsultinggroup.com)

# PRESENTERS:



**RITA KELLER:**

is a nationally known CPA firm management consultant, author and speaker with over 30 years of hands-on experience. She writes an award-winning daily blog on CPA management and is repeatedly named as one of the Top 100 Most Influential People in Accounting. Rita helps firms become “firms of the future” that will attract and retain diverse, high-performing talent.

[www.ritakeller.com](http://www.ritakeller.com)



**JACK SUTTLE, CPA:**

has been active in the Profession since 1967. As a founding member and managing member of the firm of Suttle & Stalnaker, PLLC, the firm grew from three persons until today it has approximately 65 total personnel serving clients throughout the state of West Virginia and surrounding areas. The firm also previously had offices in Alabama, Louisiana, Texas and Virginia. Jack has presented numerous seminars and workshops relating to goal setting, leadership, discovering your strengths, mentoring along with various other topics. He currently teaches for Becker Professional Education and the University of Charleston, Graduate School of Business. His experience and knowledge in areas pertaining to managing and building a successful professional accounting firm will prove very valuable to the success of your efforts.

[jack.s@suddenlink.net](mailto:jack.s@suddenlink.net)

## 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.

- Pre-reading books will be assigned (purchased by you)
- Case studies and articles to be provided (will be sent to you)

### **(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 September 2011, as a pre-assessment, and in June 2012 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.

## Day 1- 4.5 CPEs

1:30 pm to 5:30 pm eastern time

### **360° Firm Leadership Feedback Report & Key Characteristics of a Managing Partner**

Instructors: Rex Gatto, Ph.D. and Jack Suttle, CPA

- Identify characteristics of successful managing partners
- Review Upward Evaluations on each participant to benchmark against characteristics of Successful Managing Partners
- Learn the components of the firm of the future
- Review firm analysis on each participant's firm to benchmark against the Healthy Firm
- Develop your firm based on how it is niched or structured

Session  
1

## Evening: Networking Dinner- 6:15pm

## Day 2 - 8 CPEs

Continental Breakfast from 7:45 am - 8:30 am

**A.M.- 8:30 am - 10:00 am**

### **Governance - Applying Strategy and Execution to Achieve Success**

Instructor: Tim Michel, CPA

- Designing an effective governance structure
- Defining Roles and Responsibilities
- Execution and Accountability

**A.M.- 10:15 am - 12:00 am**

### **A Workplace Transformation - Building on the Power of Diversity**

Instructor: Rita Keller

- Understanding the power of generational differences
- Managing and motivating the Millennials
- Thriving in the new era of women in charge

### **Lunch**

**P.M. - 1:15 pm - 4:45 pm**

### **Panel Discussion**

Instructors: Rita Keller, Tim Michel, Jack Suttle and Rex Gatto

- Panel Discussion by the presenters to address questions by the participants
- Round Table Discussion by the presenters
- Closing

## **Virtual Coaching: scheduled individually - Skype or phone**

### **Dates (to be assigned):**

**A one-hour coaching call will be scheduled in October, January and March (3.6 CPEs).**

### **Suggested coaching focus:**

1. The Managing partner's action plan, development and implementation of firm enhancements (partner development)
2. Firm's vision, mission and long-range goals
  - Practice philosophy - firm structure -niches/departments
  - Service goals
  - Practice development goals
  - Firm's future vision (firm growth)
3. Personnel policies
  - Recruiting and hiring
  - Goal setting, evaluation and promotion process
  - Performance Feedback
  - Succession planning

Coaching

**Webinar 1 - Wednesday November 16, 2011 - Webex**

**1:00 am - 2:40 pm (2 CPEs)**

**Leading the Next Generations of *Right Partners***

Instructor: Rex Gatto

- Why keep your firm; why not sell?
- Right Partners vs. Toxic Partners
- Innovation within the firm

**Webinar 2 - Wednesday February 15, 2012 - Webex**

**1:00 am - 2:40 pm (2 CPEs)**

**Linking Partner Accountability and Compensation**

Instructor: Tim Michel

- What's accountability?
- Performance equaling compensation
- Compensation process

**Webinar 3 - Wednesday April 11, 2012 - Webex**

**1:00 am - 2:40 pm (2 CPEs)**

**Learning to be the Head of Your Firm**

Instructor: Jack Suttle

- Why be the leader of your firm?
- Building your firm
- Where do we go from here?

**Webinar 4 - Wednesday May 16, 2012 - Webex**

**1:00 am - 2:40 pm (2 CPEs)**

**Perfecting Your Relationship Skills (helping CPAs become proficient managers of people)**

Instructor: Rita Keller

- Focused, hands on management
- The importance of mentoring

**Day 3 - 4.5 CPEs**

**A.M. - 1:00pm - 3:00 pm**  
**Identifying Your Successor**

Instructor: Rex Gatto

- Creating a pool of candidates
- Differentiation, partner evaluation
- Key performance indicator of being a partner

**P.M. - 3:15 pm - 5:30 pm**  
**Creating Solutions to Firm Succession Concerns**

Instructor: Tim Michel

- Identifying partner and key-person succession issues
- Creating written transition plans
- Tools and templates

Session  
2

**Evening: Networking Dinner**

**Day 4 - 8 CPEs (continental Breakfast 7:45 am - 8:30 am)**

**A.M. - 8:30 am - 12:00 pm**  
**Unmasking the Mystery of Firm Operations**

Instructor: Rita Keller

- What really goes on behind the scenes
- Dealing with change and keeping pace
- The power of the role of firm administrator

**Lunch**

**P.M.- 1:15 pm - 4:45 pm**  
**Preparing Your Firm for the Future**

Instructors: Rex Gatto, Tim Michel, Rita Keller and Jack Suttle

- Defining the next firm years/managing firm values while creating change
- Creative possibilities for your firm
- Panel discussion
- Closing

## **Program Dates and Location:**



### **SESSION 1:**

September 8 & 9, 2011, Pittsburgh, PA

All participants are responsible for making their room reservations and travel arrangements. All necessary information (exact times and place) will be sent to participants after the registration fee is received.

### **SESSION 2:**

June 7 & 8, 2012 Pittsburgh, PA

## **After The Course Is Over**

All participants will have the opportunity to continue the mentoring and coaching process with any of our presenters that they chose. We will help participants continue to make a difference. Contact Gatto Associates and we will explain the coaching process and fees.

### **Cost of the Managing and Partner-in-Charge Program:**

Participant fee is \$7,500 for the entire program.

A discount of five percent (5%) for two partners from the same firm and a ten percent (10%) discount for three partners from the same firm.

**Registration Deadline: August 2, 2011**

Register on line at <http://rexgatto.com/programs/managing-partner-senior-partner-program> or call Gatto Associates at 412-344-2277.