2 Day Workshop
Group Exercise – *Selling Value to Staff*

Instructions to the Group: Create a list of at least 5 Questions/concerns/obstacles you face when selling the value of a CAS practice to staff within the firm.

1. I am already buried in work. Even if this is the best idea in the world, how are you going to make room in my schedule for this?

2. We already do bookkeeping for our clients. How is what you are describing different?

3. What will my actual job be in the CAS division?

4. I know that there are growth opportunities for me in audit, tax, and other “traditional” areas of our firm. What opportunities would I have here?

5. How will my performance be measured?

6. Will I be working at client locations?

7. I’m sure that I will have questions/concerns/frustrations and even suggestions as we move forward. Where will I go with those?

8. You’ve mentioned that I might have the option to work remotely – will I need my own equipment? What equipment will I need to buy?

9. How will I learn these new software applications?

10. What is this going to do to my work with my existing clients?

11. What if I don’t want to telecommute (if that option is given to me)?

12. How will I know if a client is asking me to do something that is outside of the agreement with them?

13. What are the advantages to our firm doing this?

14. How do I know if our client is current with their billing so that I know whether I can provide their services this month?

15. How will clients communicate with me? Will they be calling me with questions every 5 minutes if I am their outsourced accountant? I’ll never get any work done!
2 Day Workshop

Group Exercise

Sample Answers to the questions from Day 2 –

1. There are several ways a firm might handle staff scheduling and workload during the transition of clients to the CAS technology solutions and workflow:
   a. Retain qualified consultants to assist with the transition by working “parallel” with the staff member so that the staff member remains the primary point of contact with the client throughout the process, receives necessary training and support during the transition, but does not have to do all of the transitional tasks and continue completing the client’s ongoing work until the transition is complete
   b. Offer over-time or bonus compensation to staff that are willing to invest additional hours in this process (evenings, weekends, etc.)
   c. Set “transition milestones” and offer that there will be a small firm celebration or other “perks” as each milestone is met.
   d. Make a list of all of the benefits of this transition and post it somewhere that staff can see it easily and frequently to keep them motivated (even on your intranet or in another location if you are working remotely)

2. As a firm our view of “bookkeeping” as part of our client services is evolving. We’ll be leveraging today’s leading technology solutions to change many of the manual, paper-intensive steps we complete now into a paperless, web-based workflow and document management process. You’ll have opportunities to help our clients work more efficiently, get better information, and we’ll be contributing to their success in very tangible ways. Instead of opening mail, entering vendor invoices, stapling check stubs to the backs of the invoices, filling document rooms with paper files (or working with clients who do this), needing to go on site or have clients come in to the office to sign checks, etc., this will all become so much more efficient and web-based. Clients will be able to work with us from anywhere, and will have anytime access to their information, even from their smartphones and iPads (and other tablets over time).

3. We’ve carefully documented each of the positions in the CAS practice. Let’s review them together so that you are able to carefully see how you would fit in the model now, and what other positions exist in the model.

4. By reviewing the CAS Organization Chat and CAS job descriptions together (as discussed above), you as an employee will have a solid sense of where you fit now, and the positions that you will report to. These are positions that, if you have the right education, certifications, and if you demonstrate exceptional performance, you could pursue in the future. You might even excel in areas such as practice sales and development, “help-desk” support and/or client onboarding, etc. and in that portion of the “Org Chart” vs. the vertical steps to Controller or CFO. As this division continues to evolve there are opportunities that will develop that we likely haven’t even considered yet, but it is already easy to see the tremendous potential for growth in this division. It is also really important to note that because you will be working with a number of clients vs. just one company as you would be if you were working in private industry, you will be
truly learning the skills of your job and will become more and more of an expert in the field vs. the experience in industry where it is more frequent to “memorize the steps” sometimes and not necessarily become an expert at the skills and technology themselves.

5. We will be using a mix of the following to measure performance:
   a. Critical Success Factors (some defined by the firm, some which we will define together as we discuss your goals and commitments in your position)
   a. Key Performance Indicators that will provide information about timeliness of work, profitability, add-on sales, and much more
   b. Client feedback based on periodic, structured surveys, requests for testimonials, our Client Advisory Board, etc.
   c. Feedback from firm managers and other staff
   d. Your feedback and self-review

6. This will depend on whether it is a goal of the firm to pursue working remotely with clients either in an increased way or up to 100% of the time. The group should discuss:
   a. Bookkeeping provided on site or remotely vs. Controller and/or CFO services (many firms have decided that bookkeeping will be done remotely even if advisory services are still offered on site)
   b. If firms have multiple offices in different geographic regions, what if the best person for the project is in another state?

7. Where to go with questions/concerns/problems and suggestions:
   a. Consider applying to participate in our Employee Advisory Board
   b. Provide feedback to your manager/partner
   c. We offer incentives for suggestions we implement in the firm!
   d. If you have technical support questions relating to one of the software applications we are using, contact [insert name(s) of staff charged with each area to make it easy for other staff to know where to go for answers]). They will escalate your question or issue if they cannot answer it themselves.

8. If I am allowed to work remotely, will I need my own equipment? What will I need to buy?
   a. Based on the list of technology solutions your firm will use as part of your operations, it you can create a checklist of equipment and other items staff will need at home (VOIP headset, landline, webcam, minimum computer requirements, separate space in the home to work, etc.)
   b. Our firm is pleased to offer a company-sponsored equipment lease program so that you can easily meet your minimum technology needs to work remotely.
   c. This is a list of equipment that is considered owned by the firm if for any reason your position comes to an end, and also a list of any equipment (generally inexpensive “consumable” items like basic VOIP headsets, etc.) that are considered yours at the time they are given to you.
9. Training schedule – this is our tentative [insert 6,9, ideally 12] month training schedule. As we evolve this may change, but you can always view the most current version of this schedule [insert place]. If you feel that you would benefit from additional training in a particular area, please talk with [insert name].

10. Let’s walk through our new CAS service offerings and how we’ll be providing these to clients so that you can see your role in this process and ask any questions that you may have (suggested that you do this in group sessions AND in individual sessions).

11. We realize that telecommuting may not be the right fit for every employee. Since it is an important part of the structure of our firm, let’s talk about the reasons you feel this would be difficult for you, and how we might respond to your concerns. If you demonstrate exceptional job performance, we may also be able to structure your “pay for performance” compensation to include firm-approved rental of office space at a regional executive suite or other approved location. It is important that we have a detailed understanding of the concerns and issues you are experiencing so that we can work with you to determine the best solution(s).

12. We make it easy for you to understand the scope of our agreement with each client, and we reward you for helping us manage each client engagement. Every Engagement Letter clearly lists the services we have agreed to provide for the client, their fee structure, their assigned CAS team, and other important matters. You have access to these agreements so that you are able to view them any time you are unsure and/or that you receive a request from a client for a non-routine task. In addition, in our CRM system we have listed the services that we provide in the CAS practice, and have checked off the services we have agreed to provide for each individual client within their “Services” screen in the software. Since our CRM software is web-based, you can easily access this information from anywhere to get the information you need about our agreement with that client.

As an important note to keep in mind, always remember that our clients receive pre-coordinated services week after week, month after month, etc. In addition, you are generally providing the same services for all clients within the same industry vertical and/or based on other similarities. Based on this, a client requesting any report or other task from you should be a “red flag” that it may be outside of the scope of the agreement, since they would otherwise not have a reason for asking (the rest of their services and reports are already scheduled). If you are not sure you should seek support from your Manager or other appropriate member of the CAS team.

One fine point when analyzing scope creep can be transaction volume when processing Accounts Payable transactions, etc. We track the ongoing monthly transaction volume for each client based on their processing through Bill.com. If in a particular month you find that a large number of documents have been submitted compared to that average transaction volume, please bring that to the attention of a Manager or other appropriate person immediately since any transaction “spike” greater than 10% of the existing client agreement would be an additional fee to the client.
When you identify and help the firm accurately charge for scope creep situations and Service Orders, you are compensated for this through our pay for performance compensation model. So, as the firm wins, so do our clients, and so do you!

13. There are a number of advantages for firms providing CAS services to current and new clients. Just a few of the tremendous opportunities/benefits include:
   a. Opportunity for ongoing consistent revenue and profit stream throughout the year
   b. Higher quality ongoing financial information to support tax planning and other services that can be provided by the firm, that are often hampered when clients do not have timely, accurate financial information.
   c. Improved client retention through increased ongoing “touches” created through payroll processing services, client accounting and CFO services, etc.
   d. The opportunity to provide the advisory and accounting services that clients are asking for and need, leading to excellent profit opportunities for the firm, especially as other services such as tax preparation, etc. face increasing fee pressure
   e. New opportunities for firm staff, excellent opportunities for remote/virtual staff AND client relationships
   f. With the rapid growth of the CAS service model in the accounting profession, firms that do not respond to this area that clients are demanding will soon find that they have been left behind and will be struggling to catch up.

14. In our CRM system we clearly note whether a client is ever on hold for failure to maintain a current billing status with us. As you log in to that client’s profile to begin your services for that period, you will quickly see the bold red box in the event that a client’s account is temporarily or permanently suspended. In addition, a list of any clients in this situation will be communicated to the entire CAS team once each week, with immediate notification sent to the client’s assigned CAS team in the event that a client’s account is put on hold. The same process will exist if a client is restored to “active” status once payment is received. Since we are automatically charging a client’s bank or credit card, these situations will generally be rare.

15. As a CAS practice we realize that you need uninterrupted time to complete assigned tasks. At the same time we of course want to provide superior responsiveness and support for our clients. In order to meet both needs, we have taken an approach that is very unique in an accounting firm, in that we have dedicated Client Representatives who are responsible for handling the “first step” of client phone calls and inquiries. In addition, our CAS department has Help Desk staff that are asked to work with clients to respond to Service Orders that are outside of their core engagements with the firm. There is ongoing interaction and sharing of responsibilities among all members of the CAS team, but these additional layers of staff that are specifically designed to help provide “shock absorption” and “front line” client service for non-routine tasks help by giving our clients the high level of service and results they need while helping to shield our staff that provide ongoing client accounting services so that scheduled tasks can be completed with minimal interruption.