

Smart Tips on Negotiating Your Career Needs



Rita Keller

According to the [2011 PCPS CPA Firm Top Talent Study](#), career growth opportunities, salary and an open door, accessible management style were among the chief reasons that high-quality young people choose or stay with a firm. Unfortunately, however, many talented professionals who are very good at their jobs may have trouble when it comes to negotiating their career needs.

"We frequently see firm leaders surprised by the turnover of valuable players," says Jennifer Wilson of

ConvergenceCoaching LLC. "When those staff members explain why they are leaving, the firm leaders often say they would have given them what they wanted if they had just asked."

That's a serious problem for these professionals and for the firms that employ them, she says. "When people have specific needs and they don't express them, frustration builds up and that will express itself. Their motivation, morale or productivity may drop or they may develop a disengaged or resigned approach to their work."

This may be particularly true for women. "In leaner times, many firms have had to assign more work to fewer people," notes Rita Keller of Keller Advisors LLC. "While men may ask for an extension or for more people when faced with a daunting task, women may not, but they will take an offer of assistance once it comes along."

Wilson advises firm members that speaking their minds is in everyone's best interest. "Some people think it's selfish to ask for what they want," she says. "They don't want to burden their supervisor. Or they may assume their supervisor will read their mind and fix the problem. In fact, not expressing your needs is a disservice to the entity and its leaders, because it affects performance."

Women may be especially reluctant to negotiate, according to Keller. "In general, studies tell us women do not negotiate well," she says. "Women tend to wait to be recognized, or they think their work speaks for itself and they will be rewarded for good performance. Usually they are. In fact, men are rewarded on potential and women are rewarded on performance."

State the Problem...

Whether you're the person whose needs are not being met or you're hearing those words from a staff member, the first step is to categorize which needs are involved. "Often young people know they don't feel motivated or happy, but they don't really know why," so Wilson urges CPAs to identify exactly what they want before they speak to a supervisor. "If you want to negotiate change, you'll need to be as specific as possible."

For most people, the most pressing needs involve compensation, scheduling, development (such as training, mentoring, coaching or skills building) or assignments or responsibilities. Those are relatively straightforward issues, but staff may also need more recognition for their contributions or praise for their efforts and that's harder to ask for.

If money is the issue, Wilson recommends entering negotiations armed with research about salaries for peer positions elsewhere and what the general

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market compensation is for the position. Be sure you are drawing the right comparisons in your research. “Maybe your peer is making more than you, but you and your family get free health insurance coverage,” she says. “Make sure the compensation comparison is right, taking into account salary, bonus and all fringe benefits.”

If you still have a case for a raise, schedule your discussion in advance, Wilson advises. “Don’t spring your request on your supervisor standing in the doorway at five p.m.” In the meeting, state how much you value your career at the firm, but explain why you need something more. “Make a statement of commitment,” she says, “explaining that you want to learn and advance to a specific level down the road.”

Remember to focus on the market. “Don’t talk about things that are specific to you, such as your new baby or the house you just bought,” Wilson says. “Those are your personal life choices. Instead, have a business discussion about the value you believe you contribute and explain that it will be difficult for you to continue working for a below-market salary. Say that you feel you owe it to your family to maximize your earnings. Then state specifically the increase you would like to see.”

While Wilson generally recommends this direct route, she acknowledges that it may not work with all bosses. If a softer approach is required, point out that you are not being paid at the market rate and ask what it will take for you to get to that level and how long it will take. “Turn the meeting into a request for guidance,” she recommends, “and you may get valuable feedback on the skills or other attributes you’ll need to develop to make a raise possible.”

...And the Solution

If you are asking for scheduling changes, Wilson recommends discussing not only the problem you’re facing but also a concrete solution. Among other

things, “employers will want to know how you will ensure continued communication with staff and clients,” she says. “At a minimum, show that you are ready to take responsibility—using a cell phone or other means—to ensure that you will be able to communicate with other staff members and key clients. In addition, be prepared to show you’ve considered the impact to all stakeholders, then present a solution. Among the stakeholders, include not only other staff and clients but also others within the firm who might want to do the same thing.”

For employees who feel they are getting little feedback—or only negative feedback—Wilson suggests opening a conversation this way: “Because you’re so busy, I don’t get a sense as often as I’d like of what I’m doing well and what I need to improve.” Tell your supervisor you’d like more feedback and establish a regular check-in period in which you drive the meeting and ask pertinent questions about your work. These might include:

- What am I doing well that I should keep doing?
- What is not working that I should stop doing?
- What am I not doing that I should start doing?

“If you ask your supervisor to institute change, you may run into resistance,” she says. “If you suggest a solution and ask their opinion of it, you’re more likely to reach eventual agreement.”

Above all, don’t be afraid to speak up, Keller urges, a step that may be easier for men. “When a headhunter makes an offer to a man, he will take it to his supervisor and get the higher offer matched. A woman in that situation is more likely either to take the competing offer and leave or to turn it down without mentioning it to the boss. As a result, two workers who start at the same salary will quickly diverge. Their performance may not be that different, but since one didn’t negotiate, she will lag behind—or go elsewhere.”

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Related Resources

The [PCPS Human Capital Center](#) contains a wealth of resources relating to compensation, work/life balance, understanding generational gaps at work and performance management. Both members and non-members may wish to begin their research by checking the [PCPS Human Capital Toolbox Series](#), a group of 11 brochures that introduce readers to topics covered in the center.

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What specific roadblocks do women face in negotiation? Keller says that Suze Orman has pointed out that women can help their families by helping themselves. "They should not be afraid to ask for money."

Women may have also already inadvertently taken on a secondary role in their firms. "Many Baby Boom partners have groomed younger females to take care of them and their clients," Keller says. "The women become the strong right hand, but they never make it to partner because they are focused on technical work. Younger men, on the other hand, speak up about what they want and may lobby to work for the partner who brings in the most high-profile work."

Changing Times

The need for flexibility also has long been an issue mainly associated with women, but that is changing, as younger men also are involved. Keller points out that young couples today raise children and take care of the house as a team, which may not be the case in the homes of many Baby Boomer partners.

As a result, "women managers report that when they ask for a flexible schedule, they perceive that firm leadership immediately assumes that means they don't

want to be partner. For that reason, when talking about needing more flexibility, it's important to clarify that your career is still important to you and to explain your long-term professional goals," Keller says.

Firms should be aware that this is no longer a women's concern, it's a lifestyle issue for both sexes. "In the next 10 years, there will be a massive restructuring in the way CPA firms are structured, as cloud computing and other advancements make it that much easier to work anywhere," Keller says.

Paint a Clear Picture

The latest AICPA research forecasts strong demand for accounting graduates, which may indicate a [potential staffing shortage](#) down the road. That means it is in firms' best interest to hold on to their best people. That's good news for those who are able to communicate their career aspirations and expectations.

"Paint a picture and tell your supervisor what you are trying to achieve," Keller recommends. "You will see the difference in the way you are treated. Partners love it when you come into their offices with solutions. If you are a good performer, the firm will not want to lose you."

Did You Know?

PCPS members can now take advantage of an exclusive new resource: the [PCPS CPA Horizons 2025 Toolkit](#). Over the last several months, the AICPA has been involved in CPA Horizons 2025, a visionary look at the global trends, new technologies, demographic changes and other factors that the profession will face now and in the future. Back in the 1990s, the Institute's CPA Vision Project successfully predicted the core purpose, values, competencies and services that would be important for the profession through 2011. CPA Horizons picks up on the work of that project and extends it further into the future.

The PCPS CPA Horizons 2025 Toolkit enables firms to profit from the profession's work in this area and chart a roadmap for their own future. It includes:

- A participant workbook.
- A backgrounder detailing the history of the Vision Project and a related chart.
- Access to three wall charts the firm's facilitator can use during a strategic planning exercise.
- The "Insights to Go" handout, which participants can use to document what they learned in the planning session and their next steps.

PCPS BRIEF

Build Your Practice with a Client Advisory Board

By F. Stephen Wershing, Jr.



F. Stephen Wershing, Jr.

The biggest single problem with professional services marketing is the inbreeding of ideas. We develop our marketing plans and campaigns on our own, based on anecdotal and subjective information gathered casually from clients in meetings over the years.

We rarely test our ideas with clients and prospects and have no system for objectively gathering client perceptions. The people with whom we want most to communicate, the people we are counting on to have

an emotional reaction to what we have to say, are generally left totally out of the process.

Our marketing messages must be compelling and must resonate with our target clients and prospects. That requires guidance and feedback from members of that tribe. Only they can educate you on what is really important to them and how they describe it. In the financial services marketing that I see, anything that may be important to clients is almost always described in terms defined by the marketer. It is no surprise that so many prospective clients fail to connect with it.

This applies as well to improving the client experience. What is most important to our clients, and how are we

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doing at it? Is it being accessible to them, or how quickly we return a phone call, how thoroughly we explain our advice or how much can we save them on their taxes? Have you designed the client experience yourself or in conjunction with the clients you value most?

A Powerful Tool

The most powerful way I know to engage clients and others in these processes is the client advisory board. Effectively used, the advisory board involves the clients in your strategic decisions, gradually tailoring what your practice provides and how. You design your practice around your best clients. They become more loyal and refer more clients like them.

There are many issues and questions you can ask an advisory board to address. At the most basic level, they are a great source of feedback.

- Are our reports useful to you?
- Are our tax organizers easy to use?
- Do we respond to calls and questions quickly enough?

This kind of information is useful and can help you make adjustments to improve your practice.

On another level, you can engage a client advisory board to address higher-level issues you believe concern them. Specifically, they can be critical in designing a communication strategy for a major event, such as the retirement of a partner or a proposed merger. Getting guidance from some of your best clients on how to address such issues can mean the difference between success and failure of the transition. When AM&M Financial Services, a financial planning, wealth management and tax shop in Rochester, New York, was acquired by Tompkins Financial, they distributed a press release and little else. At their next advisory board meeting, the clients expressed serious concerns about what the acquisition meant to their service mix. The planned agenda was thrown out and the balance of the meeting was spent on their concerns. The result was a firmwide communication strategy to explain the merger and its implications to clients. The firm turned widespread client anxiety into a very positive client relations opportunity.

Send the Right Message

Many firms use their boards to test and tailor their marketing. Emerson Wealth Management in Boston first sought the board's guidance on determining their differentiator, their competitive advantage. One of the

clear messages was that the clients appreciated the depth of the relationship the firm had with them, what managing director Stacy Austin Reinhart describes as "stickiness."

So, the firm retained a marketing consultant who developed a campaign around the slogan "Invested in Relationships." The leadership at Emerson liked that, and thought it reflected the clients' feedback well. Before proceeding, they brought the new campaign to the client advisory board.

The board unanimously disliked it. They felt it didn't connect with them, that it was too impersonal. But they worked on it. After some discussion, they made a small but significant change: "Invested in You." Everyone on the board said that message spoke to them, was more personal and accurately described their feelings about their experience with the firm.

The most valuable task for your client advisory board is to determine the strategic direction of your practice. What kind of client should we serve? Are we providing the right mix of services, or should we add or discontinue some? What should we do with clients who no longer fit our target market? Such questions alter the fundamentals of your business plan. They can form the basis of the most valuable discussions you can have with your best clients.

Raising Tough Questions

They are also some of the scariest questions an advisor can put before an advisory board. What if the clients want the practice to go in a different direction than the firm leaders plan to take it? What if the clients recommend that you discontinue a service you consider to be most important or valuable? What if the board urges you to pursue a strategy you don't believe will work? What makes those issues so scary is what makes them so valuable. Is it more important to implement what you think is best or to run your business according to what your best clients want most? If clients believe you are willing to tailor your business to their wants and needs, and you communicate the changes you make through a newsletter, your Web site, or correspondence with clients, their loyalty and level of engagement can increase dramatically.

According to the [PCPS Client Advisory Board Toolkit](#), the size of the board will vary based on firm size, but is typically eight to no more than twelve participants. At first, choose only firm clients as members, and make

Related Resources

PCPS members who are uncertain how to get started can turn to the [PCPS Client Advisory Board Toolkit](#). In addition to comprehensive advice on putting a board together, the toolkit's resources include:

- An action plan that outlines the steps to get started.
- Invitation and board meeting scripts.
- A confirmation letter for board members.
- A timeline that provides an overview of the process.
- Sample board meeting agendas and questions.
- An after action review plan to ensure the board's work is put to good use.

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sure they represent all of the firm's service areas. Once the board has met more than once, you may slowly reconfigure the firm to represent an equal mix of clients, spheres of influence and friends of the firm. Spheres of influence generally mean referral sources, such as bankers, attorneys and brokers. Friends of the firm are prospects whose business you have courted but not yet won.

I recommend that the board meet between two and four times per year. The board is an ongoing body, and clients typically serve a three-year term. Tenure is staggered, so that one third of the board changes each year. This systematically involves more people and their new ideas, while maintaining some continuity.

There are two kinds of participants that can be recruited to your board – influencers and experts. The objective of many advisory boards is to increase business with existing clients and referrals to new clients. For this purpose, you will need participation by clients (or centers of influence) who are influential in that community or group. You will want to recruit board members who are well connected to other potential clients of your target profile, or represent the ideal client.

You can also use your board to help work through business decisions. Most accounting practices are small businesses and cannot afford to employ expertise in all the areas involved in running them. If you engage your board this way, you will want to recruit clients with specific expertise in disciplines you do not employ directly. Emerson, as described above, has a marketing professional on its board. Many boards include a human resources professional.

One other kind of participant you need, whether they are an influencer or expert, is a curmudgeon. The biggest risk you run in an advisory board meeting is that you get only positive feedback. That may not sound so bad, but it means that your discussions will never spotlight something you can improve, which means you're missing valuable contributions. Seek out someone who is willing to voice concerns about what you do or how you do it. When they voice their opinions, it gives other participants permission to offer their constructive feedback as well.

The Facilitator's Job

One more secret to making your client advisory board a success is the use of a facilitator. Apart from adding

expertise, there are a number of ways the facilitator contributes to the dynamic of the advisory board. A good facilitator should be able to:

- Understand how to frame discussion questions to stimulate the best participation. There are many ways to ask a question, and the outcomes can be radically different. For example: "Which of our services do you find most valuable?" Sounds reasonable, right? But consider the richer information you will get if you say: "We want to focus on the services most valuable to you. Can you describe an experience you had with us that changed how you run your company?"
- Ask questions you cannot. Consider the question: "What do you think would be the best way to deliver a service like that?" From a facilitator, this is gathering information. From firm members, it may sound like a sales pitch.
- Serve as a sounding board or target for criticism that clients would not be comfortable saying directly to you. Critiques and expressions of concern are extremely valuable, but board members will be reluctant to criticize you, especially when you're buying them a nice dinner. A facilitator can introduce a topic, open discussion about services and get to the point where clients reveal: "I really don't like..." Jackpot. An issue has been uncovered that will positively change the client experience.
- Prevent responses that shut down conversations. It's natural to defend against criticism, however minor. But the right response is worth several times your investment in hosting the advisory board. For example, a client says "this other accountant provides these services way better than you." Firm members may jump in and say, "Let's review why we provide this service this way, and if you think we should change it we can discuss it." Although subtle, the message here—"You are wrong, we know how to do this"—stifles the conversation. However, the response from an experienced facilitator would be more like: "What do you like most about what that other advisor does?" That conversation results in vastly more useful information.

Bring Clients on Board

If you want more loyal clients who refer clients like themselves, engage them in determining the direction of your practice and the delivery of your services. Take care in composing and running your board, and it

Last Chance to Register for WIEC Workshop

PCPS members receive a \$250 discount on the AICPA Retaining and Developing Women Leaders: Organizational Strategy [Workshop](#), which will be held in Chicago on October 17 and 18. Participating firms will come away with a customized strategy for women's initiatives or gender diversity implementation that identifies the obstacles they face and builds an individualized roadmap. The workshop will be led by Todd R. Mitchell, CPA, of Elliott Davis, Greenville, South Carolina, a member of the AICPA Women's Initiatives Executive Committee who has championed the Women in Leadership initiative at his firm, and Mary L. Bennett, of ML Bennett Consulting.

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will make a dramatic difference in the growth of your business.

Stephen Wershing, CFP®, coaches financial advisors to be more effective and successful, and attract more clients and

referrals, by developing more client-connected and client-driven practices. He consults with financial practitioners on many practice management issues, including strategic differentiation, client advisory boards and implementing technology.

TECHNOLOGY UPDATE

Internet Bandwidth Considerations

By Roman H. Kepczyk, CPA.CITP



Roman H. Kepczyk,
CPA.CITP

It's almost impossible to find an organization today that doesn't rely on the Internet to access some kind of mission-critical service or business resource, and CPA firms are no exception. While most firms use the Internet for research, electronic filing, banking, payroll and accounting

software updates, an increasing number are storing all their documents on the Web, providing access to client documents via portals, and more and more are running their entire practice through resources hosted "somewhere in the cloud." The Internet is the pipeline that connects our firms to these resources and there are many new and evolving technologies that dramatically impact the availability and cost to your location.

Time for Review

Surprisingly, most CPA firms have not re-evaluated their options recently, since they signed up for a standard contract many years ago and "everything has been working fine." In consulting with firms, we find that many have not re-evaluated their bandwidth in more than three years and can significantly increase their bandwidth or add a redundant connection for what they are currently paying or, in many cases, pay significantly less just by asking what options are now available.

Today we recommend every firm have a second, redundant Internet connection with a different backbone provider from their primary line. If there

is an interruption in the primary service, this second connection allows the firm to access email, file tax returns and access applications hosted on the Web. Many of today's routers and firewalls are "dual broadband capable," meaning they can connect both a cable and fiber connection simultaneously. As a result, Internet access automatically switches over if either of the connections is cut off, which is an absolute requirement for firms operating in the cloud today.

While dedicated T-1 lines costing \$700 a month were commonplace four years ago, most traditional providers have had to cut their prices to compete with fiber loops, business cable, fixed wireless and even digital cellular connectivity. The reach of competing services has expanded to virtually every market today. Firms can learn about options available locally by asking their network integrator or using a service such as BroadBandReports.com to find out what services are available at their address. Traditional copper wires running to the office are being replaced with fiber connections, increasing T-1 speeds that were traditionally 1.5Mbps to 10Mbps or more. Cable providers are bringing in business-quality connections for a fraction of the cost of the traditional providers. While the cable upload speeds are not as fast as their download speeds and maybe not as reliable as the traditional fixed lines, they often provide significantly more bandwidth, which more than makes up for the inconsistency. We've seen firms in Texas and Illinois with 50Mbps cable connections for under \$200 a month. We are also seeing fixed wireless options like [Clear](#) and [Airband](#) that use radio to transmit data providing comparable bandwidth and cost, but use a dish on the roof instead of cables coming into the

Sole Practitioner Resource

Connect with Other Small Practitioners at the Next PCPS Small Firm Networking Group Meeting

Designed for sole practitioners and those with 10 or fewer professionals, the PCPS Small Firm Networking Group meetings offer members the rare chance to get together with practitioners facing similar challenges and opportunities and share their insights and inspirations. The next meeting, which will take place in San Diego from November 9 through 11, offers a wealth of education and networking options. This special gathering will bring together the three PCPS small firm groups for a dynamic joint session. Featured speakers will include:

- CPA Jim Metzler, AICPA Vice President, Small Firm Interests, giving a timely update on the issues facing small firms.
- Bill Pirolli, PCPS Executive Committee Chairman, discussing the best ways to maximize your value to clients.
- Consultant Joel Sinkin offering an insider's perspective in a workshop on succession and M&A concerns.

There will also be breakout sessions on hot topics, including staffing, technology and time management and delegation. At the meeting's Small Firm Town Hall, practitioners will have the chance to share their biggest headaches and most effective solutions to common problems. The meeting will conclude with best practices breakout sessions in which participants can learn the smartest

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building (which often is the same access point for wired connections). Other options to consider are digital cellular providers like Verizon, Sprint and AT&T that are rolling out 4G services to many markets. In some locations, the 4G services are 6Mbps to 10Mbps for a single \$50/month fee and can be accessed by air cards in individual workstations or mobile “hotspots” which can connect up to ten users through a smart phone or MiFi device, possibly the most reasonable redundant solution for a small firm.

Keep Your Options Open

The key to optimizing Internet resources is not to get into any contracts longer than three years, and

preferably two, so the firm can re-evaluate options more frequently. Whenever a contract is signed, the firm should put an appointment on their calendar to re-evaluate bandwidth six months before the expiration date so you can continue to take advantage of current options.

Roman H. Kepczyk, CPA.CITP, is Director of Consulting for Xcentric and works exclusively with accounting firms to optimize their internal production processes within their tax, audit, client services and administrative areas. He recently updated the 2011 Quantum of Paperless Guide (Amazon.com), which outlines key digital best practices every CPA owner needs to understand.

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ways to address the top issues for small firms.

New members are encouraged to join the groups, which meet twice yearly, so be sure to register now for the November meeting. PCPS also offers networking groups for medium and large firms and for human resources professionals. Click [here](#) to learn more.

PCPS UPDATE

Register Now for Upcoming PCPS Networking Groups

The [PCPS Firm Size Networking Groups](#) allow practitioners to meet with other CPAs in firms of similar size and brainstorm solutions to the challenges they share. The PCPS Human Capital Networking offers the same opportunities to human resources professionals. Plan now to attend one of these group meetings:

- [Small Firm Networking Group](#) (for firms with 10 or fewer professionals): All three groups will meet in San Diego on November 9 through 11. (See more about this group in the “Sole Practitioner Resource” box on page 6.)
- [Medium Firm Networking Group](#) (for firms with roughly 11 to 20 professionals): October 26-27, Jacksonville, Florida.
- [Large Firm Networking Group](#) (for firms with over 20 professionals): November 28-29, New York City.
- [Human Capital Networking Group](#) (for those charged with human resource responsibilities): October 6 and 7, New Orleans, Louisiana.

Keep Up to Date with PCPS Web Seminars

What keeps CPA firm owners up at night? What issues are top of mind for your competition? Those are some of the many questions answered by the [2011](#)

[PCPS CPA Firm Top Issues Survey](#), a unique study of the challenges facing firms much like your own. The next [PCPS Web Seminar](#), “PCPS 2011 CPA Firm Top Issues Survey Results,” will provide a comprehensive overview of the survey findings and what they mean to CPAs. This interactive PowerPoint presentation will be given by PCPS Senior Technical Manager Heidi Brundage on October 28 from 2 to 3.30 ET.

And save the date for the November seminar:

- “Asset Protection for Accountants,” presented by Ira Rosenbloom on November 7.

Timely PCPS Publications

Where can you learn about the latest developments in technical issues, the best advice for making the most of seasonal practice opportunities and the inside scoop on unique issues facing small firms? PCPS publications address all of those issues and more. In our most recent editions:

- The [Summer 2011 Technical Issues Alert](#) highlights the AICPA Accounting and Review Services Committee’s clarity project initiative and covers proposed revisions to AICPA Ethics Interpretation 101-3, among other recent technical news.

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Mark Your Calendar for Upcoming WIEC Webinars

Webinars presented by the AICPA Women’s Initiatives Executive Committee offer valuable insights into how firms can reap the greatest benefits from their entire talent pool. Planned [Webinars](#) include:

- “Telework Strategies: Creating and Measuring the Benefits of an Agile Workforce and Workplace,” presented by Kellie Hunter and Karol Rose on November 17 from 2 to 3.30 ET.
- “Adding Value: Women Serving on Boards,” presented by Mindell Nitkin and Patricia Deyton on December 7 from 2 to 3.30 ET.

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- The Fall 2011 *Seasonality Success* offers advice on undertaking comprehensive firm planning; provides a checklist that helps all firm members understand the objectives and deliverables of the engagements they're assigned to; examines one firm's successful effort to involve staff in creating a formal training program; and explains firms' options when trying to avoid problems with software encryption.
- In the Fall 2011 *Small Firm Solutions*, Jim Metzler, AICPA Vice President, Small Firm Interests, updates

members on ongoing efforts to bring greater relevance to private company financial reporting. The issue also provides a timely update on advocacy efforts being made on behalf of small firms and reviews results of the *PCPS CPA Firm Top Issues Survey*. An article on the lessons learned last tax season offers tips that firms can use to enhance efficiency and profitability before the new season begins.

FYI

It pays to be a member! The Private Companies Practice Section represents more than 6,800 local and regional CPA firms. PCPS provides member firms with up-to-date information, advocacy and solutions to challenges facing their firms and the profession. For many CPA firms, the price of membership is more than matched by the thousands of dollars in free member benefits and discounts. If you have any questions about PCPS membership, please call 1-800-CPA-FIRM or e-mail PCPS@aicpa.org.

A New Free Mobility Resource for CPAs

The AICPA and the National Association of State Boards of Accountancy have launched CPAmobility.org, a free online tool designed to help CPAs navigate the new practice privilege requirements that allow CPAs to more easily practice across state borders.

A joint project of the AICPA and NASBA, the new site provides helpful information, updated regularly, on state practice privilege requirements for CPAs, commonly referred to as "mobility" laws, for all 50 states and 5 U.S. jurisdictions. In four simple clicks online, CPAs can learn whether their existing home state registration is mobile and allows them to work in other jurisdictions without additional notice, or whether further paperwork is required. In most cases, additional registration is no longer required because mobility statutes recognizing CPA licenses granted by other states and jurisdictions have been enacted in 47 of the 55 U.S. jurisdictions.

"CPAmobility.org is a valuable service that allows CPAs to take advantage of the benefits associated with state mobility laws with confidence. We are happy to offer a free tool that will assist CPAs in determining whether or not they can exercise mobility in a particular jurisdiction at the click of a button, on their laptop or mobile device," said Ken L. Bishop, executive vice president and COO of NASBA.

"Mobility has become a reality for CPAs and accounting firms from coast-to-coast and it is now time to open the system for business," said Barry Melancon, president

and CEO of the AICPA. "We are very pleased to be able to offer this free service to CPA firms together with NASBA, which was a key partner in developing the technology and information to power the Web site."

The site works by posing three targeted questions to CPAs interested in exercising cross-border practice privileges:

- Where is your principal place of business?
- Where are you going to perform services (target state)?
- What type of services will you perform?

Information on licensing and registration requirements is then produced, allowing CPAs to move quickly to address new business opportunities. CPAmobility.org offers immediate access to the site through a mobile application, an attractive benefit for CPAs needing to confirm eligibility requirements while they are on the road or away from their offices.

NASBA and the AICPA have been longtime advocates of mobility, providing support and resources to state boards and state CPA societies seeking changes to current rules. As additional states continue to embrace mobility, the need to educate CPAs on the requirements is growing. CPAmobility.org will feature useful links to NASBA and AICPA resources. To learn more about mobility or to research cross-border practice privilege requirements, visit www.CPAmobility.org.

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