



Ohio Chapter Meeting

Friday, July 21, 2017

Ohio Society of Certified Public Accountants Conference Room
Columbus, Ohio

The following members were in attendance:

Leisha Rospert
Rick Lightner
Patti Miller

Tammy Boring
Kim Tanner

Tim Bub
Neil Hinkle, CPA

Guy Gage
Sharon Trabbic

Presentation

[Jeff Nischwitz](#), "The Future of Leadership"

Some highlights of Jeff's presentation included a summary of his experience walking the Camino Trail in Spain (199 miles).

Take-aways:

- Leadership is making sure your team is less afraid
- Over-estimate instead of under-estimate our gaps.
- Have honest conversations:
 - Be clear about expectations
 - What works, what doesn't work
- Don't treat different people the same
- Walk the Talk!
 - Make time
 - Provide feedback
 - Care and Serve
- Services are not serving
- Make a Commitment to yourself and your team:
 - *"I will always have time to ask questions, to listen to provide timely feedback, care and serve. Always."*
- Consider what is the unintended message or impact.
- Step on people to bring them back to reality.

- Leadership and culture is not defined by what you preach – instead it's defined on what you tolerate.
 - What is your firm "tolerating" and what can you do about it?
- Ask questions – the most effective communication is 80% questions (and not rhetoric questions).

Business Meeting

The minutes from the May meeting as posted on the website were approved. Tammy reviewed the treasurer's report and it was also approved as submitted.

Leisha reviewed the list of new members.

The September meeting has been changed from September 15 to September 22 since September 15 is a tax deadline day. The meeting will be held at the OSCPAs offices. The topic will be "Build a Health Management Strategy That Works".

Sarah Galley reviewed the upcoming meeting dates and other tentative program topics for 2018.

Election of Officers – Sarah Galley, Past President, presented the slate of officers for the 2017-2018 year:

President	Leisha Rospert	Payne, Nickles & Company
Vice President	Timothy Bub	Newman & Company, CPAs
Secretary	Michelle Holmes, PAFM, SHRM-CP, PHR	Martin Recchia, Inc.
Treasurer	Tammy Boring	Synder & Company
Program Chair & Past President	Sarah Galley, PAFM, SPHR	Pohlman & Talmadge

Tim Bub moved to elect the slate as presented, and Tammy Boring seconded. Motion passed unanimously.

A discussion regarding the CPAFMA National Conference held in Fort Worth, Texas was held. Kathy Pool from Rudler, PSC was the recipient of the Ohio Chapter scholarship. She will provide input at the next meeting in September. Sharon Trabbic provided an overview and solicited comments about the national conference and distributed a list of the 75/85 Ideas session. She also mentioned the 2018 mega conference which will be held in conjunction with the AICPA in Las Vegas (ENGAGE) – June 11 through 14.

Following the business meeting, the group participated in a roundtable discussion of these topics:

- 1) What do firms do for their clients for the holidays?
 - *Fruit baskets, trade with a florist in town who is a client, other firms do other trades with clients' products; popcorn and kettle corn popular; some firms donate to a charity on behalf of that client; others do not do anything;*
- 2) Paid Time Off options
 - *Some firms allow rollovers up to 4 weeks, others can carry over only 40 hours. Some firms make exceptions for carry-overs for maternity or paternity leave. Many questions*

about this lately. Some firms moving to unlimited PTO. Suggest checking out the Q&A forum on website.

- 3) Employee Testing?
 - *Kolbe or DISc or other products used, Strength Finder. Talk to Sandra Wiley at Boomer. Preview XT for pre-employment, 10 characteristics of high performers.*
- 4) Employee Evaluations
 - *Continue, Stop, Start is a popular idea. Also Fast Feedback forms (available on PCPS website)*
 - *Firms vary between annual and mid-year reviews*
 - *Software options including **Trak Star**, **Bamboo HR** and **Performance Pro** were discussed to aid in evaluation process. Halogen is an option - it was recently purchased by Saba. It's geared to firms with over 100 employees.*
- 5) Senior Managers not ready to be a partner
 - *"Executive Presence" and "Business Development skills" seem to be the recurring theme of why senior managers aren't asked to be partners.*
- 6) New Business Incentive Programs
 - *Some firms offer incentive from 5% to 10% of new revenue (new business or new services for existing clients – it depends on the firm), also some firms insist that realization is over 90% to qualify for incentives. Term of incentive varies between 1 year and forever.*
- 7) Invoicing – mail v. email
 - *Email is a popular option to save printing and mailing expenses. Easy to do in CCH Practice Management, QB and TR Practice Solutions.*
- 8) Focusing on markets or industries?
 - ***First Research** and **IBIS World** are products which can help educate your employees on the nuances of a prospect or client's industry*
- 9) On-boarding new clients
 - *New client package including auto-set up on Portal, and signature on engagement letters.*
 - *RootWorks/Liscio platform (Darren M. Root company) has developed a "client experience platform".*

Respectfully submitted,

Sharon L. Trabbic, PAFM
Acting Secretary