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## LETTER FROM THE CHAIR:

I am happy to report that one of the newest free PCPS member benefits—our online Practice Management Forums—has been a terrific success. I hope members have participated in the Forums, which are interactive, online PowerPoint presentations led by nationally recognized speakers. They make it possible for practitioners to get great advice on hot topics without leaving their own offices. Participants in each presentation also typically gain access to value-added tools offered by each of the presenters, such as checklists, sample plans and other resources.

We launched the Forums in June, and the response from members has been tremendous. Speakers so far have included:

- Jeffrey Pawlow, CEO of The Growth Partnership, who discussed three key elements of a firm's profitability—practice management, practice development and people development—and highlighted best practices in each one.
- Joel Sinkin, Senior Partner at Accounting Transition Advisors, who tackled the important issue of succession planning for one- to five-partner firms, including choosing a successor and identifying your firm's value.
- Gary Boomer, CEO of Boomer Consulting, who shared his insights on firm strategic planning, touching on the importance of developing a shared vision and addressing leadership issues.

Interest in these events has been very strong, and I believe members will be equally enthusiastic about our upcoming Forums:

- "Developing Your Firm's Marketing Plan," to be presented by Jennifer Lee Wilson, Co-Founder, ConvergenceCoaching, on September 21, from 2 to 3:30 pm EST.
- "Performance Evaluations That Work! The Power of Communication," presented by the Institute's own Mark Koziel, Senior Technical Manager—Firm Practice Management/PCPS, on October 18, from 2 to 3:30 EST (see more on this Forum in the item below).
- "Pricing on Purpose—Implementing Value Pricing in Your Firm," presented by Ron Baker, best-selling author of *Professional's Guide to Value Pricing*, *The Firm of the Future*, *Pricing on Purpose*, and *Measure What Matters to Customers*, on November 14, from 2 to 3:30 EST.

I hope you'll set aside the time to participate in this exciting new opportunity for PCPS members. I'm certain you'll be glad you did.

All the best,  
Richard J. Caturano, CPA  
Chair, PCPS Executive Committee

## LETTER FROM THE VP:

Last month, the AICPA's PCPS and Firm Practice Management operations moved from New Jersey as part of the first wave of several Institute divisions that are relocating to new offices in Durham, North Carolina. The relocation is expected to provide the Institute with an annuity savings of approximately \$10 million to \$15 million a year over the next 15 years. That means we'll be able to dedicate even more resources to member programs, services and benefits.

In line with the move, we have a number of talented new professionals coming on board to serve PCPS members. I'd like to take this opportunity to introduce them to you:

- Stephen Winters, CPA, Director, Specialized Communities and Practice Management, oversees the development, ongoing improvement and delivery of services to members in Firm Practice Management and the PFP, IT and BVFLS interest areas. Steve has over 20 years of experience in public accounting, including serving as the managing shareholder of a CPA and consulting firm. He was the Chief Operating Officer of a software development company and has experience as a licensed investment advisor. He has spent the last five years as the Senior Director in charge of CPA Channel Development for CPA2Biz.
- Mark J. Koziel, CPA, Senior Technical Manager—Firm Practice Management/PCPS, is responsible for strategic initiatives and programs of PCPS and practice development for small/medium size general practice issues and advocacy. He has lengthy experience in public accounting and most recently was Director of Public Affairs clients and the Media Planning department for a political media firm.
- Jeannette Team, CPA, Senior Project Manager—Firm Practice Management, will coordinate projects across BVFLS, PFP, IT and PCPS interest groups. She has extensive previous experience in public accounting and as an internal auditor.
- Heidi Brundage, CPA, Project Manager—Firm Practice Management, will be the staff liaison for specific PCPS task forces and projects, such as the National Management of an Accounting Practice Survey, Small Firm Network Groups and the Top Talent Survey. Her areas of expertise include recruiting, orientation and project management.
- Elaine Leggett, CPA, Project Manager—Firm Practice Management, will be the staff liaison for specific PCPS task forces, including Workload Compression and Communications, and participate in management of Major Firms' activities. She has 10 years' experience in public accounting, including serving as a controller and firm administrator.

In addition, an Institute veteran, Alex Mancuso, Project Manager—Firm Practice Management, will be the staff liaison in Durham for specific PCPS task forces and projects, such as the National MAP Survey and the MAP Medium and Large Firm Network Groups. He has been with the AICPA for nine years and with Firm Practice Management for three years.

As we go forward in our new location, these team members will be working to continue to provide excellent programs and services designed to help PCPS practitioners succeed.

Best regards,  
Jim Metzler, CPA  
AICPA Vice President, Small Firm Interests

### **MAP Survey Results Coming Soon**

PCPS members can look forward next month to receiving the results of the 2006 PCPS/TSCPA National Management of an Accounting Practice Survey. The survey was completed on September 1, and results will be available free in mid-October to all PCPS members. This comprehensive study provides local and regional members with an excellent opportunity to benchmark their own operations against those of their peers, offering size-specific and practice-specific information, as well as data gathered specially for sole practitioners. A total of 41 state societies and the Association for Accounting Administration support the survey, which helps to guarantee that results will paint a detailed and accurate picture of practice management issues in firms today.

### **October Practice Management Forum: Improving Communication in Performance Evaluations**

It's important for staff members to understand firm leaders' expectations, but performance evaluations can be a stressful event for both the supervisor and the person being evaluated. The next free PCPS online Practice Management Forum, "Performance Evaluations That Work! The Power of Communication," to be presented by Mark J. Koziel, CPA, AICPA Senior Technical Manager–Firm Practice Management/PCPS, on October 18, from 2 to 3 EST, will help take the anxiety out of the process. This interactive PowerPoint presentation will demonstrate how to increase effectiveness through open communications and build better relationships with staff. Topics to be covered include:

- Why evaluations are necessary, not only from a legal perspective but in retention, as well.
- Developing a performance evaluation system that includes goal setting up front to outline expectations for the evaluation period.
- Five key areas of concentration for a performance evaluation system.
- Implementing a performance evaluation system with evaluators and developing a consistent approach to delivery of performance evaluations.
- Involving those being evaluated and training team members on enhancing communication lines.

PCPS members will receive e-mailed invitations to register before each forum, so don't miss your chance to sign up.