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PCPS Spotlight Ceremony: Best Practices at Work

The first PCPS Firm Spotlight Recognition Ceremony, held at the AICPA Practitioners Symposium in Las Vegas in May, recognized 10 firms for best practices in various areas of practice management. They included:

- For their human capital initiatives: Gary R. Brown, CPA LLC; Wilkins Miller, PC; Elliott Robinson & Company LLP; Aronson & Company; and Johnson Lambert & Co.
- For work/life balance initiatives: Heinfeld, Meech & Co., PC; KAWG&F, PA; and WithumSmith+Brown.
- For firm succession efforts: Cohen & Company, Ltd. and HLB Tautges Redpath Ltd.

How did these firms earn their recognition? Last month, the PCPS Brief reviewed some of the best practices used by firms recognized in the human capital initiatives category. In this month's Brief, we'll look at the firms recognized for their work/life balance initiatives. In addition, the **PCPS Firm Practice Center** each month will add a new story focusing on each of the firms and how they put their great ideas to work. You can find the first postings [here](#).

Keeping Work and Life in Balance

Firms that make it possible for staff to balance their professional and personal lives will have more satisfied — and probably more effective — employees. They will also have a distinct advantage in their recruiting and retention efforts. According to Heinfeld, Meech & Co., in Tucson, “we recognized that work/life balance initiatives were key to our continued success, as high staff retention is crucial to both succession planning as well as ensuring a high quality of service provided to our clients.”

With that in mind, here are some of the steps taken by the Spotlight Recognition firms:

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Implementing flexible schedules

This policy has been adopted by many practices, and the Spotlight Recognition firms demonstrate how well it can work. At Heinfeld, Meech, flexible or part-time schedules are offered to all professional employees, including partners, rather than used only for seasonal staff. At KAWG&F in Maryland, employees can choose a core work schedule that best suits the needs of the firm and their families, or they can use an alternative schedule. "As a reward for our hard work, dedication and commitment to our clients," says one CPA on staff, "the firm provides us with the flexibility we need to manage the work/life balance. It's a win/win!" At New Jersey-based WithumSmith +Brown, a flexible work arrangements task force addresses employee needs on a case-by-case basis. In one case, a female senior manager was recently promoted to partner while working part time.

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Taking advantage of technology

Technology has made it much easier for employees to work from home or any other location. At KAWG&F, the firm switched to a paperless environment that has significantly improved communication from remote locations and client relations. It also offers employees the flexibility to work from any location in which there is Internet access. At WithumSmith+Brown, all employees have laptops, Internet access and the capabilities they need to work from wherever is necessary; those at manager level and up receive a smart phone to stay better connected when away from the office.

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Extended leave programs

Heinfeld, Meech staff are allowed to take up to 16 weeks of unpaid leave between April 1 and August 31 for any reason. Their status as full-time employees is not affected and they continue to be covered by the firm's health insurance plan during the leave.

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Take time for fun

"Mental wellness is just as important as physical wellness, particularly during the busiest time of year," according to WithumSmith +Brown. Stress reducing activities that the firm uses include office foosball tournaments; "Dress Up Saturdays," when staff wear costumes based on themes such as the 80s or prom night; busy season massages; bowling parties; exercise instructors; and dinners for staff working late.

The programs described here make it possible to hold on to talented staff and prove the firm's commitment to them. If you're not using strategies like these in your firms, you may be missing out on great retention opportunities.

In our next issue, we'll examine some of the firm succession best practices recognized in the PCPS Firm Spotlight Ceremony.

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