

Official Newsletter of the Andersen Alumni Association



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Straight Thoughts, Straight Talk

"Serving Andersen Alumni Worldwide"

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Editorial

A time for reflection and gratitude

As Thanksgiving approaches, I'm reminded of how much we have to be thankful for. This quarter marks the **completion of our 18th year of continuous publication** of the Andersen Alumni Association E-Newsletter – a testament to the enduring strength of our community. My sincere thanks to **BGS Consulting** for their continued sponsorship and to the many **alumni thought leaders** who share insights that keep the Andersen spirit of "Think Straight, Talk Straight" alive.

This past quarter brought both milestones and mourning. **Andersen Global's filing of its Form S-1 with the SEC** is a proud moment that reflects our shared legacy's continued relevance. Yet we've also felt the shock and sadness of **Charlie Kirk's assassination**, a stark reminder of how vital civil discourse and mutual respect are in a free society. Even amid global tensions, including in the Middle East, I remain hopeful – and profoundly grateful – for the freedoms we enjoy. As we give thanks, I'm guided by the words that define both faith and service:

“I believe in my country because it is a land of freedom and because it is my own home, and that I can best serve that country by doing justly, loving mercy, and walking humbly with my God.”

As Always Think Straight Talk Straight....

[Warren Turner](#)
Editor

Alumni On the Move

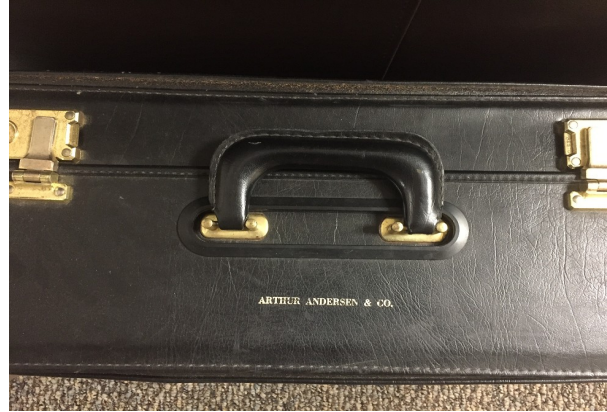
Congratulations to the Following Alumni and Best Wishes in your new roles.

Francesco Quinterno	Maureen Lesak Flener	Kiley Arnold	Linda Jaworski
Fred Van Alstyne	Tim Makris	Michael Park	Brad Satenberg
Kevin Jackson	Nichole Jordan	Matthew Becker	Matt Parson
Laurie Ringlein	Mark Brockelman	Kimberly McGarry	Frank Lanuto
Ryan Greene	Kenneth Huntley	Eric George	Patrick Pugh
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Patrick Rowland	Scott Helmus	Drew VandenBrul	Peter Lops
Tammie Riddle	Jim Hulslander	Kristen Bechard	Oscar Perez
Bill Chorba	Marc Detampel	Louis Gump	Susan Atchison
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Brandon Lee	Daniel Smolczynski	Scott Wahlers	George Kelly
Mary Ann Medina-Kennedy	Sherry Perrault	Ivan Garcia	Lisa Sanford
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If you have recently changed jobs and would like to share your good news with other Alumni, please email details to Admin@andersenalumni.com



Andersen Global Files Its S-1

By Warren Turner, *Former Enterprise Group Manager and Founder of Andersen Alumni Association*

A phoenix is rising from its ashes... Approximately one month ago, on September 19, 2025 Andersen Global, Inc. filed its FORM S-1 REGISTRATION STATEMENT UNDER THE SECURITIES ACT OF 1933 with the UNITED STATES SECURITIES AND EXCHANGE COMMISSION. Andersen Global, Inc. has applied to list its Class A common stock on the New York Stock Exchange (the NYSE) under the symbol "ANDG." At the present time their offering is contingent upon final approval of such listing.



Andersen Global, Inc.'s mission is to deliver exceptional client service grounded in integrity, transparency, and excellence. Since its founding in 2002, Andersen Global, Inc. has experienced rapid and sustained growth, powered by its people, its values and its relentless commitment to innovative, client-focused solutions. Building on the rich traditions and culture of the former Arthur Andersen,

Andersen Global, Inc. is driven by a bold vision to lead in a complex global marketplace, creating lasting value for its clients, its people and its investors.

Built on the legacy of Arthur Andersen, Andersen Global, Inc. believes its brand is one of the most globally recognized and respected names within professional services. Associated with commitment to the highest standards of professionalism, the Andersen brand stands for a culture of excellence, superior client service, deep talent and consistent growth. These defining qualities have helped serve as a catalyst for Andersen Global, Inc.'s meaningful and sustained client growth and continue to drive its ability to attract new clients and talented professionals today.

With over 44,000 professionals and 2,900 partners operating in 182 countries as of June 30, 2025, Andersen Global and its affiliates provide their clients with access to deep tax, legal and financial expertise that is differentiated from traditional multinational consulting firms and is complemented by on-the-ground experience with local business practices and regulations.

A copy of the S-1 can be downloaded from the SEC by clicking [here](#)

[Warren Turner](#) is C-Level advisor and Managing Partner at Cardinal Points Group. He works primarily in the tech sector where he has authored and taught numerous business courses leveraged by IBM and its Business Partner ecosystem. Warren is a big believer in the power of connections and in 1998 founded the Andersen Alumni Association.

Everything You Thought About Enron and Arthur Andersen is Wrong - “85,000” the Podcast

By Larry R. Katzen, Former Managing Partner for the St. Louis office and Great Plains region and author of the book, “And You Thought Accountants Were Boring”

For more than 20 years, many of us have carried the weight of a story that was never accurately told. The fall of Arthur Andersen was not only a defining moment in business history, but also a life-altering event for 85,000 innocent employees and their families worldwide.

I am excited to share with you a project that has been years in the making: “85,000,” a documentary-style video podcast series dedicated to finally telling the truth of what happened through the voices of those who lived it. This series features never-before-heard interviews with former Andersen leaders, employees

(including David Duncan), attorneys like Rusty Hardin, and government officials, such as former Representative Michael Oxley, co-author of the Sarbanes-Oxley law that governs the accounting firms today. Together, these conversations and others shed light on how government overreach and media narratives destroyed one of the world's most respected firms.

My goal is simple: to preserve the legacy of Arthur Andersen with honesty, dignity, and accuracy. We want the world to understand the human cost of what happened, not just the headlines, but the stories of careers disrupted, reputations tarnished, and families forever changed.

This podcast is more than history; it's a reckoning. And it is only possible because of the strength and solidarity of the Andersen community. Podcast release details are currently being finalized and we have launched the official "85,000" website (85kPodcast.com). Our website serves as the central hub for updates, additional content, and release information. Visit 85kPodcast.com and you can find the 2-minute preview of the podcast, a synopsis of our story and add your email for the release notification when the official podcast drops.

We will be sharing more details soon, including ways you can listen, support, and spread the word. Thank you for keeping the Andersen spirit alive all these years.

Why Intrapreneurship Is a Game-Changer—Even for Early-Stage and Mid-Sized Companies

By Louis Gump, *Andersen Alumnus(1993-1996)* , Author and partner in the Executive Operations practice at TechCXO

In recent conversations with CEOs, founders, and general managers, one theme keeps coming up: the urgent need for employees to think like owners. This mindset shift isn't just good for the company—it creates lasting value for customers and fosters deeper engagement among team members.

This is where **intrapreneurship** comes in.

Many people assume intrapreneurship is primarily for large corporations. Think Ford's launch of the Mustang, 3M's creation of the Post-It Note, and Apple's development of the iPhone. Those are legendary examples—but focusing only on them misses the bigger picture.

As Andersen alumni, we and our teammates have worked with many companies that have led their industries—and seen that this mindset applies far beyond the Fortune 500.

In truth, intrapreneurship applies across the spectrum of organizations. You don't have to launch the next iPhone to drive meaningful innovation. And you don't need to be Apple-sized to delight your customers.

One of the key findings from my research is that intrapreneurship thrives not just in Fortune 500 companies, but in organizations of all sizes. It nurtures a mindset of ownership and care—especially in growing firms ranging from a few million to a few hundred million in annual revenue. It's equally relevant when a company is expanding geographically or launching new products and services.

Some of the most dynamic growth I've seen recently has come from:

- Technology services and SaaS firms
- A local insurance agency
- A wealth management practice

Each of these organizations is investing in inside innovation—creating structure, offering guidance, and empowering teams to take ownership.

I recently spoke with the CEO of a growing technology services firm known for its cutting-edge tech, creative problem-solving, and strong customer relationships. Despite solid momentum and a culture of empowerment, he remains hungry for growth. One simple but powerful initiative he introduced. A company-wide book club—using weekly chapter discussions to spark new ideas and put them into action immediately.

Especially today—with AI advancing at lightning speed—the power of a motivated, aligned team is more essential than ever.

Leaders can foster this kind of culture by:

- Empowering intrapreneurs
- Dedicating resources (even modest ones) for innovation
- Structuring for idea-sharing
- Modeling a growth mindset

When leaders actively support intrapreneurship, they unlock far more than new ideas. They increase retention, strengthen collaboration, and accelerate growth. The ripple effects are measurable: more adaptable organizations, more resilient teams, and a deeper sense of shared purpose.

Leaders of smaller organizations play a defining role in shaping culture. By championing intrapreneurship—through encouragement, resources, and the right structures—you create not only business growth but also long-term fulfillment for your team and yourself.

In the organizations that you care about, how are you supporting and empowering intrapreneurs today?

[Louis Gump](#) is partner in the Executive Operations practice at TechCXO, where he helps high-growth companies thrive as a fractional CEO/COO, strategic advisor, and executive coach. Passionate about elevating intrapreneurs worldwide, Louis is the author of the Amazon bestselling book [The Inside Innovator: A Practical Guide to Intrapreneurship](#), which is available from Fast Company Press wherever books are sold.

Letter from PCI re: Publication Status of the 5th Edition Alumni Directory

By Drew Clancy, *President of PCI*

We are currently working with Andersen Alumni to put the finishing touches on the book and finish production of the project. While we originally planned to ship the books by the end of September 2025, we wanted to inform you that we are currently experiencing a delay with our printer due to a backlog of projects. Please be assured that we will ship to you as soon as possible, however, we do not have an estimated ship date at this time. We hope to complete production over the next few months and ship out your books towards the end of the second quarter of 2026.

For those that purchased the digital version, you will receive an email from PCI in the coming months with the subject “Your Andersen Alumni Digital Publication is Ready.” The link in that email gives you access to the content of the printed publication. For those that purchased the apparel items, please know that we are working to ship those items before the end of first quarter of 2026.

We greatly appreciate your understanding and patience throughout this process and unexpected delay. We encourage you to contact us directly should you have any questions about your order. We can be reached at 1-800-982-1590 or by email at PCIservice@publishingconcepts.com.

Thank you again for your participation in this important project.

Sincerely,



Drew Clancy
President

Hiring a Fractional CFO: The Top 7 Questions From Company Owners

By Robb Thomas, *Former Arthur Andersen Bankruptcy/ Turnaround Consultant*

I receive quite a few emails from business owners/founders asking about working with a fractional CFO (fCFO). Many of the emails contain the same handful of questions which means, at least to me, that there are undoubtedly a lot of others asking the same questions to fractional people they may know. In this issue, I attempt to answer the most asked questions. Please note that my answers are based on my own experience as a fCFO for the past 7 years. Obviously, cost savings is a common question, but since there are a lot of sources that answer this question, I don't spend much time on this question.



Owner's question 1:

"I'm considering hiring a fCFO instead of a full-time CFO. But what are the financial trade-offs? Can I really save money? And are there hidden costs I need to watch out for?"

Answer: This question is almost always the first one asked. The financial picture is often favorable for a fCFO—if you structure it well—but there are caveats.

What you can save vs full-time

- A full-time CFO in the U.S. often commands base salary, benefits, bonus, equity, and overhead. Many sources cite full compensation north of \$200,000-\$400,000+ for experienced CFOs in mid-sized firms
- Because you avoid full benefits, office costs, equity allocations, and full overhead, your effective “all-in cost” is often 30-40% lower than a full-time hire. Some virtual CFO firms claim exactly that margin
- Also, fCFOs are often available quickly, which means you don’t wait months in recruiting before seeing value.
- Perhaps the main benefit of working with a fCFO is that you work with them when you need them and for as long as you need them

Hidden costs & traps to watch

- Scope creep: If your fCFO is doing bookkeeping cleanup, system implementation, or chasing after missing data, hours can pile up quickly
- Mis-allocation of time: If much of your “fCFO time” is consumed by low level or low-value tasks, you lose leverage and incur costs perhaps unnecessarily. Your fCFO should recommend that low level tasks be performed by lower cost options
- Onboarding inefficiencies: Slow access to your systems, data, stakeholders, etc can make the ramp up period drag and reduce effectiveness of your fCFO
- Risk of underperformance: A fCFO with weak domain fit or little experience may deliver reports or forecasts with little to no analysis or recommendations and as such, little value. Many critiques of fCFO services speak of dashboards that look good but don’t drive decisions. Your fCFO should not just report data, they should help you understand what the data means and recommend action items if needed
- Internal resistance: Some staff may feel threatened or unsure how to work with a part-time CFO, especially in finance or accounting teams. As the leader of your company, introducing and empowering your fCFO is a necessity.

In short: yes, you can save money and get good value—but only if you manage scope, ramp efficiently, and pick the right person.

Owner’s question 2:

“What are the most common reasons fCFO engagements fail or disappoint? How do I avoid making those mistakes?”

Answer: Failures often trace back to mismatched expectations, weak fit, and poor integration. Here are some key pitfalls and mitigation strategies to avoid them:

Pitfall 1: Vague or shifting scope

If you engage without a tight scope (what deliverables, which metrics, timing, what level of hands-on vs oversight), the CFO and your team may interpret differently. Many reported failures in fractional engagements (some survey data suggest ~65% underdeliver on expectations) arise from poorly defined scope including timelines

Mitigation: You may consider starting your fractional engagement with a short contract with 15- to 30-day deliverables. If the fCFO delivers, you can move on to the heavy lifting needs. If the fCFO doesn't deliver, you can end the business relationship and try again

Pitfall 2: Siloed thinking / disconnect from operations

Some fCFOs operate as outsiders who don't tie in with your accounting, operations, or team. In most cases this will not work.

Mitigation: Require system access (accounting, CRM, dashboards). Insist the fCFO participate in leadership meetings. In most cases, your fCFO could share their calendar with clients so they can see when you have availability. To be blunt, your fCFO should be a true member of your team

Pitfall 3: Static forecasts, vanity dashboards

A template forecast or dashboard is useless if it is outdated or doesn't connect to decision levers. Many failed engagements deliver dashboards or models filled with metrics that look good but don't mean much or guide action

Mitigation: You should ask for tools that will be meaningful for your business. Tools like rolling forecasts (e.g. 13-week cash models, scenario planning). Choose 3-5 key KPIs tied to your business (e.g. CAC payback, gross margin, cash runway). The tools must be updated frequently

Pitfall 4: Overcommitment or overextension

Some fCFOs stretch themselves across too many clients, reducing focus and responsiveness.

Mitigation: During the interview, discuss how many clients they maintain, how many hours they will commit to you, and how they prioritize their time between clients. This is another reason to start with a short trial engagement.

Pitfall 5: Cultural or internal resistance

Accounting staff or leadership may not accept an external fCFO's authority. This leads to friction, lack of execution, or communication breakdowns.

Mitigation: Involve key internal stakeholders in selection and onboarding. Openly communicate the role with your team and set expectations on their collaboration with the fCFO. The fCFO must actively build trust early.

If you avoid those pitfalls and insist on alignment, clarity, and integration, your odds of success rise dramatically.

Owner's question 3:

“How do I pick a fCFO who will be accepted internally and effectively partner with my team? What criteria or red flags should I watch for?”

Answer: This is a great question. Cultural fit, credibility, and communication are everything. Here's a practical selection checklist and list of red flags:

Key criteria to judge

- **Domain experience / specialization:** A CFO familiar with your vertical (SaaS metrics, manufacturing margins, e-commerce) will hit the ground faster. This is becoming more important as the fractional offering matures
- **Track record & references:** Demand two or more client case studies with measurable results (cash saved, growth accelerated, capital raised). Talking with several previous clients is also a good idea. If you are using a platform like Upwork, look at any comments provided by previous clients
- **Hands-on vs advisory balance:** A great fCFO can shift between advisory and execution, not just hand you reports
- **Availability & bandwidth:** As mentioned previously, make sure their time commitment to you is real, not aspirational
- **Communication & storytelling ability:** They must convert data into strategic narratives and direction for you and your team
- **Systems fluency:** They must know accounting systems (e.g. QuickBooks, NetSuite) and analytics tools. Being able to build usable tools in Excel or Sheets is a must. Understanding AI and how it might be used in your business is a growing requirement
- **Collaborative mindset:** They should want to build with your team, not override them. They should want to be your business partner and not just a consultant

Red flags to watch for

- They can't show real outcomes (only vague promises).
- They provide overly generic dashboards or forecast templates.
- They refuse or delay access to systems or data.

- They decline to be involved in operational meetings or leadership syncs.
- They carry an excessive client load (you sense you're one of many).
- They criticize your team too early without seeking context or building rapport.

By vetting carefully and insisting on collaboration, you increase your odds that the fCFO will be accepted and effective.

Owner's question 4:

"How do I ensure the fCFO doesn't feel like an outsider and is embraced by my finance, operations, and leadership teams?"

Answer: This can be a cultural & structural challenge. Each engagement and company are different, but here are some thoughts that might make acceptance smoother:

1. **Kick off with a "360 orientation"** - In month one, schedule structured sessions between the CFO and each key function (accounting, ops, sales, marketing). Let them ask questions, see workflows, understand interlocks.
2. **Make them part of your leadership team** - Include your CFO in strategic meetings, weekly leadership huddles. Let them contribute insight, not just get updates.
3. **Set clear governance & feedback loops** - Define meeting cadences (weekly, monthly) and feedback mechanisms (what works, what doesn't). Refresh the scope quarterly.
4. **Recognize their wins publicly** - When their input saves cash, improves margins, or accelerates decisions, acknowledge it. That builds credibility internally and can make the fCFO feel appreciated and part of the team and not just a financial mercenary.
5. **Limit surprises** - The fCFO should not come in cold, then spring sweeping changes. Start with diagnostics, incremental wins, quick wins.

If you structure adoption intentionally, the fCFO can become a trusted partner, not an external guest.

Owner's question 5:

"When would you advise against hiring a fCFO? Are there scenarios where a full-time CFO or internal hire is better?"

Answer: Yes, there are times when the fractional model is not ideal. You might opt for a full-time CFO or a hybrid model in these cases:

- **When the workload justifies it** - One of the main reasons companies use the fractional model is because there isn't enough work to justify a fulltime CFO. If they hired a fulltime CFO, they could be paying fulltime compensation for part-time performance
- **When your finance function is already large or complex** - If you have multiple direct reports (controllers, FP&A, treasury) and you need ongoing daily oversight, a full-time CFO makes more sense
- **You need constant in-house presence** - If you need someone making urgent, minute-by-minute decisions or embedded in all operations, fractional can feel too distant
- **During major transitions** - In some cases, major M&A, IPO prep, or large restructurings may demand full-time focus from day one, not part-time attention

A hybrid approach is also common: start fractional, validate fit, then transition to a full-time CFO while retaining the fractional for overlap or special projects

Owner's question 6:

"How should I structure the agreement, payment, and incentives so the fCFO feels invested yet performs?"

Answer: Your contract and structure can greatly influence success. I am not a lawyer and to protect your company, you should consider seeking legal advice, especially if you have not used a consulting agreement previously. Here are some options to consider to align incentives and guard your downside. Some of the options only work if they have direct impact on the outcome

- **Phased approach:** Begin with a short discovery phase (15-30 days) to diagnose gaps and propose a roadmap. Only after that commit to a longer consulting agreement.
- **Retainer + milestone pay:** Base retainer for baseline hours, plus bonuses or project fees for defined deliverables (e.g. raise closed, cost reduction, margin improvement).
- **Performance metrics:** Link some payment to KPI achievements (cash flow improvement, runway extension, margin targets) but only those within the CFO's control.
- **Termination flexibility:** Include a 30- or 60-day exit clause if things don't go well.
- **Review & adjustment clause:** Quarterly review of scope, hours, deliverables, and pricing.

- **Ownership of deliverables:** You retain ownership of models, dashboards, forecasts. If they leave, you keep the assets.
- **Non-compete or exclusivity limits (reasonable):** Ensure they don't take competing clients in your vertical or client base.
- **Transparency and reporting cadence:** Require weekly touchpoints, monthly reports, and stakeholder updates.

With structure and fairness, you align your interests and reduce the risk of under delivery.

Owner's question 7:

"How long should I plan the engagement for? When is the right time to revisit or end the relationship?"

Answer: I am not trying to dodge this question, but in my experience, each engagement is different. I have had engagements last 3+ years and others that lasted a month. It really depends on the work that is needed

Closing Thoughts

A fCFO can bring powerful leverage to your company—expert financial guidance without the full-time cost—if you pick wisely, define clearly, and structure for accountability and integration. The financial benefit is real: companies may see 30-40% lower cost compared to a full-time CFO, yet gain access to the skills and experience they need

But your success hinges on avoiding pitfalls along the way; some of which were discussed previously. Even though the relationship may not be long term, it could be one of the most important hires you make. Do your homework, vet your candidates, and hold them accountable to help your engagement with a fCFO be a successful one.

[Robb Thomas](#) is a Seasoned Fractional CFO with over 25 years of hands-on experience across SaaS, healthcare, real estate, and service industries.

The CFO's Disruption Playbook—Is Your Company Keeping Ahead Of The Innovation Curve?

By Jim DeLoach, *Former Andersen Partner and Founding Managing Director at Protiviti. He is the author of several books and a frequent Forbes and NACD contributor.*

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Disruptive leaders transform industries by operating in fundamentally different ways than their competitors. Savvy CFOs recognize this and work closely with their CEOs and other senior leaders to ensure these differentiating capabilities are embedded in the enterprise.

As I've discussed in summarizing the results of the second annual [Global Board Governance Survey](#), conducted by Protiviti, Board Prospects and Broadridge Financial, organizations that radically transform their industry and/or launch new industries distinguish themselves from less disruptive organizations in a number of ways. Specifically, they:

1. Embrace artificial intelligence (AI) as an opportunity
2. View technology modernization as a high-priority, high-ROI initiative
3. Build an innovative culture
4. Deliver superior customer experiences

While not every company can be a disruptive leader, CFOs should commit themselves to helping the organization drive each of these disruption-related priorities to ensure their organizations remain competitive. This should come as no surprise, of course. Everyone who has operated as a finance leader in recent years has firsthand experience with the accelerating nature of the finance function's transformation. CFOs now have the opportunity to apply their core finance competencies to a wide range (broader than ever, in fact) of non-finance challenges throughout the enterprise. And all of this while CEOs and their boards are trying to figure out the answers to the questions around investing in AI and other technologies, for example, the who, what, where, how, why and how much.

To illustrate, CFOs have assumed principal roles in cybersecurity, strategic sourcing and enterprise responses to tariffs. In addition, as overseers of the organization's financial activities, many CFOs champion technology modernization initiatives that align with business strategy and objectives. These initiatives optimize costs while enabling the organization to leverage the full value of AI and other advanced technologies—and, most importantly, generate the ROI expected in these emerging areas.

Further, it turns out that technology modernization also improves the organization's ability to disrupt by laying the foundation needed to support digital transformation of processes, products and services. Thus, CFOs can help CEOs and their executive team peers ensure the continued viability of the strategy and business model in light of swiftly changing market fundamentals as well as disruptive threats and opportunities.

The CFO's contributions to other initiatives that differentiate disruptive leaders, though perhaps less direct, carry as much importance. These elements of the disruption playbook—which call for more attention to speed, structure and tone—require CFOs to work closely with CEOs and other executive team members to ensure their organizations keep pace with or stay ahead of the innovation curve. Beyond the table stakes of an innovation strategy, sufficient funding, developing talent, a KPI dashboard for the boardroom and the C-suite, and a supportive ecosystem, they include the following actions:

- **Set the tone for disruption.** CFOs who cut their teeth at the height of the Sarbanes-Oxley compliance era recognize that the attitudes and actions of executive leaders influence the workforce as much as documented policies and procedures. The same holds true in the “disrupt or be disrupted” era. It remains imperative for CFOs to act in ways that demonstrate a commitment to integrity, internal controls, transparency, accountability and corporate governance. Now, finance leaders also need to establish a tone at the top that emphasizes the importance of staying close to the customer, monitoring relevant market trends, supporting organizational speed and agility, and embracing necessary change.
- **Provide better data sooner.** When many large companies make high-impact decisions, they often take too long to reach them—and, often, too long to assess their outcomes. Relevant, accurate data drives high-velocity, high-quality decision-making. Finance functions play a crucial role in accessing and analyzing that data as more business units and organizational groups perform technology-enabled forecasting and financial planning and analysis (FP&A) activities. It is up to the CFO to ensure that FP&A processes are supported with appropriate controls, rigor and data relevance.
- **Focus on the customer experience.** Disruptive leaders obsess over creating value for existing customers and expanding into new markets. The fleeting nature of today's customer preferences and loyalty, together with a more frequent inclination to gravitate to something better, faster and lower-cost-for-value, require greater attention paid to the value proposition offered to the market. CFOs should work closely with their C-suite colleagues to place the end-to-end customer experience at the heart of decision-making throughout the enterprise.

- **Embrace an “AI in everything” mindset.** Each C-suite member should own specific AI initiatives and outcomes—“real AI” (versus “labeling AI”) use cases with accountability for real returns. CFOs who prioritize staying ahead of the innovation curve assess agentic and generative AI use cases by identifying how these solutions drive positive, long-term customer relationships and reimagine core business processes. Organizations that fail to replace data entry, manual administrative work and other manual tasks with AI tools will lose ground to AI-enabled competitors.
- **Establish an organizational structure that supports disruptive innovation.** Disruptive leaders are five times less likely than disruption laggards (companies that are at risk of being disrupted) to view “the lack of an innovative culture or talent to think creatively” as a major barrier to becoming more disruptive. CFOs should collaborate with CEOs and the rest of the C-suite to encourage an open, flexible and agile organizational structure with a hierarchy that is as flat as possible. This type of workforce model drives execution by placing a premium on efficiencies, accelerating innovation cycles, and facilitating collaborations, communications and rapid decision-making. Many CFOs have set the example by embracing culture-building in recent years. They support focused, dedicated teams by equipping them with a sense of purpose along with clear priorities, well-defined tasks, assistance from strategically aligned ecosystem partners, and direction and support from executive sponsors.
- **Learn at the speed of business.** The faster an organization learns, the faster it evolves while responding to disruptive threats and opportunities sooner than competitors can react. An agile learning organization requires a culture that embraces open-mindedness, critical thinking, fresh ideas, contrarian points of view and a commitment to fail fast. Not coincidentally, these distinctly human competencies have more space and time to be exercised in AI-enabled organizations where larger portions of routine and repetitive tasks are automated. CFOs and CEOs who accelerate workforce learning favor transparent environments defined by knowledge-sharing, networking, collaboration, broad employee participation and engagement, and team learning. In these settings, errors can be admitted and leveraged for course corrections and improvements, and unconscious biases can be rooted out or minimized. Organizations that embrace fast learning also establish feedback loops with customers, suppliers, regulators and other stakeholders to identify new threats and opportunities quickly.

Although the definitive CFO playbook on managing through disruption has yet to be finalized, finance leaders should immediately begin formulating their own views as to what it entails. Clearly, “Cling to the status quo” won’t be among its tenets. The faster decisions are made as well as executed in these dynamic times, the sooner your company can progress toward disruptive leadership.

[Jim DeLoach](#), a founding Protiviti managing director, has over 35 years of experience in advising boards and C-suite executives on a variety of matters, including the evaluation of responses to government mandates, shareholder demands and changing markets in a cost-effective and sustainable manner. He assists companies in integrating risk and risk management with strategy setting and performance management.

The Disappearing Act of Our Connections

By **Ralph Schonenbach** *Former Consultant Andersen Business Consulting , Founder and CEO of Meerkat, Inc.*

When I wrote *Relationships Matter* and in past newsletters, I emphasized the value of engaging with our networks. A recent article in *Fast Company* brought something into focus that many of us have sensed but not fully understood: our networks' content is being deprioritized and replaced with content from people we do not know, served up by algorithms.

The numbers tell the story. According to the article, on Facebook, users now spend only **17% of their time** viewing posts from friends, and on Instagram, it is just **7%**. Meta even found that when they increased friend-generated content, overall time spent on the platform decreased. In contrast, short-form, AI-recommended videos drove engagement up, which is why we see more of them.



This shift is not surprising, but it is concerning. What was once recognized as a social network has become social media, minus the social aspect. Facebook, Meta, and TikTok are no longer places to stay connected. They are closer to **Netflix on steroids**, built for endless consumption. Scrolling might entertain us, but it does little to nurture our relationships, and over time, it chips away at our well-being.

Professional vs. Personal Connections

It helps to separate professional and personal relationships, while acknowledging that there is often overlap.

- **LinkedIn** still delivers steady engagement. Posts typically see **2.8-3.8% engagement rates**, and formats like carousels and documents can reach **6% or higher**. About **40% of LinkedIn users engage weekly**, showing that professional networks remain active and visible.
- **Personal networks** are a different story. Friends and family posts are buried under algorithmic recommendations, leaving fewer natural touchpoints, fewer spontaneous moments, and fewer chances to stay close to the people we value most.

Where Did Everyone Go?

For years, I have wondered why so many people I know no longer show up on Facebook or Instagram. I assumed they were tired of the platforms and stopped posting. But now I see it differently.

- They may still be posting, but I do not see it, so they assume I am not engaging.
- Or they stopped posting because no one was engaging with them in the first place.

Either way, it is not their fault. The system is designed to reward entertainment over connection.

And that is the real point. I used to believe that when I connected with someone online, I was “in touch” and aware of what was happening in their lives. The truth is that I am not. Updates are buried, hidden by design, and replaced by content that has nothing to do with my actual relationships.

Choosing What Matters

This made me stop and think. How many relationships have slipped away, not because they lost importance, but because they were buried under a feed I no longer control? I thought I was connected. In reality, I was scrolling through distractions while real connections faded in the background.

So this weekend, I am going back through my friends list and reaching out to people I have not seen or heard from in years. Not out of nostalgia, but because these are relationships that shaped who I am. Letting them fade because an algorithm chose profit over people feels like giving away something too valuable to lose.

In the end, platforms will keep chasing our attention. The real question is whether we allow them to decide what matters.

For me, the answer is clear. *Relationships still matter most.*

and here's a link to the article: <https://www.fastcompany.com/91386830/meta-social-media-ftc-monopoly-response>

[Ralph Schonenbach](#) is an entrepreneur, author, and relationship expert with over two decades of global experience. As the author of [Relationships Matter](#), he offers practical strategies to foster meaningful connections, combining deep personal insights with actionable advice. With a strong consulting, leadership, and product development background, Ralph has helped individuals and organizations enhance their networks and achieve lasting success. Passionate about personal and professional growth, he enjoys writing, international travel, and meeting new people, continuously advocating for the power of relationships in creating impactful opportunities.

Key Considerations for Building Tech-Literate Boards in the Age of AI

By Amy Rojik, Former Senior Manager Arthur Andersen, and Managing Principal - Corporate Governance at BDO USA, P.C.

Key Considerations for Building Tech-Literate Boards in the Age of AI

Welcome to the latest edition of The Boardroom Mindset, where I bring you insights into opportunities for boards and how directors may address them. Remember to subscribe so you can be the first to know when I publish new editions.

As technological innovation increasingly drives company operations as well as product and service enhancements, assessing a company's technology strategy is no longer the sole remit of an IT team or CTO, but a core competency of the board. Building technological literacy is now imperative for directors seeking to understand both the strategic and risk implications of a changing technological landscape marked by a new age for AI and rapid technological advancements, exponential data growth, and the ever-looming threat of cyberattacks.

Some of the key technology literacy components that factor into the board's ability to oversee technological advancement include:

Assessing the Company's AI and Technological Readiness

Before diving headlong into implementation and adoption, boards should be able to properly assess the organization's current state of "technological debt."

Technological advancements can contain hidden and costly pitfalls without proper evaluation. For example, outdated legacy IT systems and upkeep failures in current software can constrain innovation and create security vulnerabilities. Poor data hygiene management can significantly undermine technology implementation plans. Siloed systems can further prevent seamless data flow

and process automation, while skill gaps and a culture unaccustomed to significant change pose major challenges to effective implementation and adoption.

Assessing Management's AI Strategy

Directors need to understand how management is strategically approaching AI in the context of broader business priorities.

- Is management starting with technology—identifying AI use cases to pursue—or with business priorities, determining where AI may create the most value?
- Are the proposed solutions aligned with key business strategy?
- What criteria are going into management's prioritization? Is management appropriately considering disruptions occurring in the industry? What about outside the industry?
- What resources may be needed to execute the AI strategy?
- How might the regulatory environment shape or constrain the company's strategy?
- How are risk appetite and tolerance defined by the board?

Adopting Technology Innovation and Implementation

The next step is understanding how management intends to move forward with technology innovation and implementation in operational areas of the business as well as in product/service development and/or enhancement.

- Has management defined parameters for what success will look like?
- Does management have a robust change management plan that considers various impacts to human capital?
- Is the board able to confirm whether management is using a [sound data governance framework](#) that includes:
 - strong data hygiene practices and a clear cybersecurity posture
 - adoption of effective project management and communication strategies for employees and stakeholders to embrace change
 - consideration of the use of third-party vendors, products, and services
 - piloting of adoption to allow for any need adjustments before broad scale use
 - establishing and monitoring ethical use policies and procedures
 - providing adequate and continual user training to encourage appropriate adoption

- How will accountability by both the board and management figure into the strategy?
- What will reporting consist of and how frequently will the board be updated in terms of progress and reliability?

Turning the Focus on Board Readiness

Building technological literacy within the boardroom is not a one-time effort. Rather, it requires an ongoing commitment of directors to remain current on the risks and opportunities arising from rapid technological advancements. Earnest self-evaluation becomes necessary to ensure that the company has board-level competency and the structure within the board that allow for effective exercise of oversight.

To achieve this, several considerations should be discussed and agreed to by the board:

- Should the expectation be that all directors have technology literacy, much like all directors are expected to be financially literate?
- Is the organization so dependent on technology or has such significant cyber risk that particular skills and expertise should be included as part of the skills matrix and/or reside in one or more directors?
- Should the board assess the need for a separate committee of the board, a subcommittee of the board, or an advisory/ad hoc committee to address technologically related issues?
- Does the board have access to and relationships with appropriate external subject matter expertise that can be leveraged to complement the board's own knowledge?
- What are the best ways for directors to receive continual education? For example, attending conferences, specific certification programming, or self-study programs; hosting custom learning events in conjunction with or outside of board meetings, etc.
- How is the board encouraged/enabled to use various AI tools to safely supplement its own understanding and capabilities?
- Are third-party applications embedded in board portals properly assessed and vetted before adoption?
- Is the company, including the board, monitoring regulatory developments in order to weigh in on standard setting and rulemaking that could impact the business?

These are sample factors for companies and their boards to consider when building technology literacy across the organization. Individual circumstances will

require adjustment and amendment to this list, but ultimately it is the board's responsibility to set the tone and tenor for leadership in this area. That begins with having the knowledge needed to make sound decisions and to ask informed questions of management, advisors, and other stakeholders.

[Amy Rojik](#) is an experienced national professional practice partner with over 32 years in the accounting and auditing profession with a strong focus on corporate governance, sustainability, financial accounting and reporting continuing education for board of directors and financial executives.

Success doesn't have to mean satisfaction.

By Gary Thomson, Andersen Alumnus and currently a Managing Director at Thomson Consulting

I'm a content person but rarely satisfied. I'm not Confucius, far from it, so this statement is not meant to be as deeply philosophical as it may seem.

I'm content in my faith, family, my position in life, my profession, my personal pursuits, my clients, and other big things in life. But that doesn't mean I'm satisfied.

Take golf, for example. I'm content playing golf. Statistically, my handicap is in the top 5% of all U.S. players, and I'm a member of an incredible golf club. My golf partners are fantastic and put up with me most weekends. And I have more golf "toys" than one person should.

But satisfaction rarely, if ever, enters my mind when golf is involved. Oh sure, there are some short-term satisfactions, but golf has this way of making you unsatisfied very quickly. One lousy round - or even one bad hole - and it's time to hit the internet for a new swing tip. I enjoy using Trackman and other technology to find new ways to generate clubhead speed, adjust spin rates, etc. In 2022 I was able to connect with a short game "guru" and add a newer approach to this part of my game. I was content with my game but not satisfied with it. I wanted to get better.

How can I be both content and lack satisfaction? Well, we can find contentment but still possess a strong desire to improve. We can be proud of what we have built while being unsatisfied with where we are today. That doesn't mean what you have done isn't good enough; it just means that things have changed, and firms need to continue to grow and strive for more - or different - successes.

I do a lot of Partner Retreats. It's one of the most enjoyable areas of my practice. It energizes me to be with firms and help them look to their future. Despite the

challenges of the last few years, the accounting profession has enjoyed some remarkable success.

Two dimensions I often see in firms:

- Satisfaction with results can freeze innovation and entrepreneurial pursuits
- Satisfaction with our history and culture can cause us to believe we can't "tinker" with anything

Let me be clear, I don't view satisfaction as being negative IF we don't let satisfaction be a preventive roadblock to improvement.

As I was planning a recent retreat, a leader expressed to me: "go easy on pressing us to think about changes; I don't want them to think our past success will make us unsuccessful in the future."

I understand what he was saying. It's easy, especially with consultants like me in the room, to examine your firm so closely that we make our past successes not seem all that great. However, if we rest on our success, we risk future lack of success. Change is not indicative of not being proud of what we've already done. It just means we must keep on going forward.

Finding a balance is critical. While acknowledging our history, culture, financial results, people, structure, etc., can be rewarding and celebratory, it shouldn't paralyze us from strongly considering what lies ahead for the future.

It's important to ask ourselves these questions:

- What's worked?
- What hasn't worked?
- How is what we are doing better preparing us for the future?
- What must we stop doing?
- What should we do more of?
- What should we add?
- Who do we need?

I could go on and on with these questions but think about your firm. If you've not asked these questions in a while, why not? Let's find a way to prepare for the future, not by minimizing our past but by focusing on the future. **We can be content with the firm we've built, but I don't believe we can afford to be satisfied.**

If you're ready to ask these questions and head toward the future of your firm, [let's talk!](#)

The Most Dangerous AI: Artificial Integrity

By John Blumberg, *Andersen Alumnus and author of Return On Integrity*
(www.BlumbergROI.com)

After a 4-year hiatus, this week I jumped to the new iPhone 17. I had mixed feelings about it, but the battery life on my old phone was waning and I was surely lured a bit by the potential of their evolving Artificial Intelligence ... or as they like to call it Apple Intelligence. Of course, all this evolution of “AI” is paradoxically filled with both wonder and wicked!

In the not-so-distant past, phones were solely an audio tool. Today, not so much ... as they’ve evolved into much more of a visual device. And when used in the right place, at the right time for the right reason ... they can be a valuable asset. Yet, that same phone can be very costly when it becomes an appendage of unconscious, bad or simply routine habits.

At a minimum, it can be distracting. At worst, it can be destructive ... to our creativity, our relationships, and ultimately to the trajectory of our journey. That’s what happens when a tool becomes the focal point. Random becomes the routine. And the routine becomes an addiction.

I’m sure most of us have experienced glimpses of this when we randomly pull our phone from our pocket and aimlessly dive into one, two or a few apps. I know I have ... more times than I want to admit. If you haven’t, just look around in any crowd and you will see what I mean. When the tool becomes the focal point, it comes with a cost.

The same is true of our behaviors, wants and needs.

Behaviors, wants and needs, in so many ways, are just tools. Yet, for many, they have become the focal point. One definition for “focal point” is the central or principal point of focus. This focal point is the object of your attention.

As I delved deeper into my work on integrity, I had no idea what a roadblock our focus on needs, wants and behaviors would be in understanding and embracing core values. It’s not that they aren’t important ... it’s the undue importance that we have come to put on them that can get in the way.

Paying attention can be a great thing unless it’s void of an intention from your core. Unintended attention can lead to a lot of useless activity ... like randomly checking your cell phone! And it can lead to a lot worse when it comes to our behaviors, wants and needs.

Attention without the right intention leads to core tension.

In our fast-paced world, we seem to give a lot of attention to behaviors, wants and needs. Just take a sampling of corporate training programs or self-help books. At the same time, most don't give near the same attention to their core values. While totally understandable, this combination eventually dilutes any sense of real intention. Behaviors, wants and needs are tangible and visual ... and therefore a little closer to our comfort zone. Yet, much like checking our cell phones, they can become quite random. Band-aid solutions in many cases.

In fact, so much attention has been given to behaviors, wants and needs, that many a list of personal and organizational core values are simply words or phrases reflecting valued behaviors, wants and needs. Not actually core values. Behaviors, wants and needs should be a reflection of our core values. Not vice versa. It's a little tricky and actually very fluid.

So, the direction of the flow matters!

Intention, grounded in a set of core values, fuels a more valuable sense of attention ... and in-turn you get a whole different level of value from your needs, wants and behaviors. When the flow is moving in the wrong direction ... that is behaviors, wants and needs unintentionally defining core values rather than core values fueling needs, wants and behaviors ... you end-up experiencing an unhealthy tension at your core.

Yet, when your core values are the fabric of your intention, you create a healthy tension amongst your needs, wants and behaviors. And, who knows, it could even help you use your cell phone in the right place, at the right time for the right reason!

There is no telling what kind of value that could bring our world!!

It might be worth spending a little time taking a look at your core values. Are they really core values ... or just a reflection of behaviors, wants and needs that you value? In building a return on integrity, we are not looking for what we value ... we are looking for what are our values. It is a lot more than just a play on words. It is a nuance that will lead connect you to the fuel of your one essential thing - your integrity. An integrity beyond the most dangerous "AI" ... Artificial Integrity.

As always, I'd love for you to share your thoughts! We could all benefit, if you would be so kind to share your thoughts email me at John@BlumbergROI.com!

[John Blumberg](#) is a champion for integrity in an age dominated by performance metrics. As a national keynote speaker and author of four transformative books, including the renowned "[Return On Integrity](#)" series, his mission is to distill clarity from the noise and foster authentic leadership.

Law and Order

By Ed Maier, *Former Andersen Partner*

It's a great life—this retirement.

In the past year, I have given up my business-related, client-serving opportunities. I am gradually adding more retirement “to-do’s” to my schedule. I am seeking new things to try—things I have not done in the past. At this point in my life, I believe variety is the best recipe for enjoyment and personal growth.

For example, I recently enrolled in my local Citizens Police Academy. It runs for twelve weeks, one night a week. Each week officers from different departments present us with a summary of the nature of the work they perform, some of the tools they use to perform it and stories about their successes and failures in doing so.

Through the first seven weeks in our classroom training, I have learned about: the usage and effectiveness of body-worn cameras; the masterful skills of K-9's and their training and performance; traffic control, management and accident investigations; the use of radar and lasers; CAPERS (Crimes Against Persons) which reflected the detailed steps and repetitive actions required to conduct investigations to the point at which arrests can be made and positive results obtained. I have learned how the SWAT team (Special Weapons and Tactics) works and seen examples of their equipment, procedures, special tactical measures and methods to resolve high-risk incidents. I have learned about procedures for dealing with mental health situations and narcotics investigations; and I have seen examples of how new tools, such as drones, are used in policing. We also listened to an extensive recording of a discussion between a negotiator and an individual who barricaded himself in his home and refused to exit on demand. The officers involved brought this situation to a satisfactory conclusion after many hours of painstaking conversation—with no harm to anyone. Future classes will include a tour of the city jail; the chance to experience shoot-and-don't shoot scenarios; understanding details of crime scene investigations (CSI); and enforcement of driving-while-intoxicated (DWI) laws.

In addition to the classroom activities, I attended an event which allowed me to drive the police department training course and learn how to handle a police vehicle at high speeds. On my first two runs around the obstacle course, I did fairly well. But I lost control and wiped out on the third! Quite an experience!

I have also had the opportunity for a morning drive-around with one of the patrol officers. This was especially interesting as the officer I rode with explained the different uses of modern technology in the vehicle and how they enhance his ability to do his job. It was very informative to accompany him and to see various scenarios in traffic and on the streets as he sees them. He helped me become

more aware of potential situations that might increase personal risk or have negative impact on my life. He also shared some stories about his own development as he has pursued his career in law enforcement.

This entire experience has been very enlightening and informative. It is easy to read newspaper articles and follow news stories on television to make judgments about what the police should or should not do in various circumstances. This class has given me much more insight into the everyday challenges that these men and women face as they, literally, put their lives on the line to serve and protect us. I wholeheartedly recommend if your local police department offers citizens the opportunity to participate in a program like this that you volunteer to participate in it. And if the police department is not something of interest, you might also find that your community offers similar programs related to the fire department and city-government activities.

As I said earlier, retirement is a great stage in life. But as I look back on my life and career, I realize I could have already done some of these “different” things with a little bit more effort on my part. I hope you won’t wait as long as I did to break out of your daily routines and experience something totally new and potentially exciting.

And, if you have already done something that’s “outside your comfort zone”, share it with me. I would love to hear from you.

As always, I am interested in your thoughts. Feel free to write to me at edmaier46@gmail.com. And, if you enjoy my writing, you can read more of it in my book *Think Straight, Talk Straight*, which you can find on Amazon right [here](#).

Adding Value When You Don’t Think You Have Any: A C-Suite Leader’s Guide to Overcoming Imposter Syndrome

By Jennifer Eggers, Andersen Alumnus and *Founder & President of LeaderShift Insights®*

You’re sitting in a high-stakes senior leadership team meeting. The conversation swirls around complex supply chain issues, technical specifications, or financial derivatives – topics far from your core expertise. Your palms sweat. Your confidence shrinks. That familiar voice whispers, “Do I even belong here?”

If this scenario resonates, you're not alone. Even seasoned C-Suite executives face situations where they feel out of their depth. But here's the game-changing truth: you don't need to be the subject matter expert to add significant value.

The Imposter Syndrome Trap

Many newly promoted C-Suite leaders fall into the trap of thinking they need deep knowledge about every topic discussed at the executive table. This mindset can lead to:

- Staying silent in crucial discussions
- Diminished confidence
- Missed opportunities to demonstrate leadership
- Questioning your seat at the table

The Strategic Pivot: Three Ways to Add Value

1. Become the Master Facilitator

Instead of focusing on what you don't know, you can add value by shifting your attention to managing the room dynamics. Great facilitators:

- Ensure all voices are heard
- Keep discussions focused and productive
- Elevate conversations to the enterprise level
- Manage time and agenda effectively

2. Deploy Strategic Questions

Your questions can demonstrate leadership even when you lack technical expertise. Here are some powerful examples:

- "How does this align with our overall strategy?"
- "What are the potential impacts across departments?"
- "What perspectives haven't we considered?"
- "How might this be perceived by our employees?"

3. Develop Your "Stress Point Radar"

Another way to add value: Learn to identify where friction and potential risks emerge. This skill allows you to:

- Clarify complex issues for the group
- Separate symptoms from root causes
- Build relationship capital by offering help where it's needed most
- Connect dots across different areas of the business

The Power of Vulnerability

Counter-intuitively, acknowledging what you don't know can increase your credibility. Being vulnerable about knowledge gaps while showing genuine curiosity and willingness to learn often builds stronger relationships with peers and direct reports.

Remember Your Value Proposition

You were chosen for your role because someone believed you would make the team better. Your unique perspective, ability to ask thoughtful questions, and skill at facilitating complex discussions are valuable contributions - even when you're not the subject matter expert.

Taking Action, Adding Value

Next time you're in a meeting where you feel out of your depth:

- Resist the urge to stay silent
- Look for opportunities to facilitate
- Ask strategic, big-picture questions
- Listen for stress points where you can add value
- Follow up after meetings to learn more about unfamiliar areas

The C-Suite doesn't require omniscience; it requires *leadership and strategic thinking*. By focusing on how you can contribute rather than what you don't know, you'll build credibility and make meaningful impacts across the organization. Remember: You can't solve what you're not talking about. Sometimes, your greatest contribution might be helping others have the right conversation.

The above is an excerpt from Jennifer's International Best-Seller, "[Mastering The C-Suite Mindset: The senior leaders playbook to build a c-level mindset, command respect and lead an enterprise.](#)" The book is based on 30 years of patterns observed while working with and coaching C-Suite leaders across 17 countries and over 20% of the Fortune 500.

[Jennifer Eggers](#) is a C-Level advisor and President of LeaderShift Insights, Inc. She works with leaders and organizations going through disruption to improve their capacity to adapt.

Grief Is Heavy, Deal With It

By Todd Dewett, Andersen Alumnus, author and speaker

I lost my wife to cancer about three months ago. I realized that loss and grief are shocking at first if you've not seen them for a while. After a few weeks of feeling very sad, angry, and lost I realized it was time to start trying. Trying to understand. Trying to envision a future. Trying to take steps to return to some form of normalcy.

I decided to write this because writing about it is therapeutic for me, and because I know that many of you are also currently facing very steep challenges in life. Some just like mine (loss) as well as many who are experiencing grief or pain for different reasons (e.g., your own health issues, projects or businesses that failed, important relationships that are damaged). So, I wanted to remind you of a few things that might help.

First, let me share that if you're still at the front end of this challenge, blocking things out and trying to ignore the pain - you must stop. Talk to a counselor of some form, read about dealing with grief (e.g., <https://tinyurl.com/255vpm9t>), or at a bare minimum, admit your current status to a kind friend or loved one and let them give you a little push towards healing. The worst thing you can do is nothing. Okay, when you are ready, remember:

You are not alone. As I noted, you're not the only one feeling pain. I know you feel alone, but so do many others. Grief, pain, and loss all conspire and make it easy for us to indulge in self-pity. Understandable. Maybe for a moment even acceptable, but not for long. When you see others every day, you're inclined to think that they are okay, they are free from the traumatic issues you're enduring, that it's only you in this horrible space. Nope. Quite the opposite. Most can relate, only a small few wonder how pain feels. Just knowing this in a strange way should help you feel a little validated and connected to something bigger.

Start sooner than later. When things feel heavy, it's easy to push away the hard work you need to face. I'll start getting better when.... Fill in the blank with any number of plausible sounding excuses. Sure, you need a few weeks, give or take, to sit in the numbness and just exist, but you simply can't allow that phase to persist for long. That will allow the weight to feel as if it is growing, possibly becoming one you can't carry. Before that happens, you must choose to begin the process of dealing with your grief. Make the choice.

Process, don't ignore. They say time helps, and in some ways it does. It's not that time heals per se, but it allows for something that aids healing - perspective. Even if you've acknowledged that you need to start doing the work, it's easy to get busy and postpone it. You are busy with family, busy at church, and of course you're buried in your work. Busy is good, but only up to the point that it detracts from your need to process grief. Busy can stop you from gaining much needed perspective. Even when busy you must pause and find time to sit and think, time to process, time to start the admittedly long process of healing.

Get support. Under the best of circumstances, this is never easy. So, why do so many people go it alone? It's tough to admit certain things to yourself. It's tougher to admit them to someone else and ask for help. You might want or need a person to let you vent - to listen to the difficult thoughts that are still swirling around your head. Even better, after that initial pressure release, you need the help of a friend to start thinking a bit more critically, not just venting. If you're smart, venting with others is just about clearing out room to start the more

focused process of understanding the situation and, eventually, growing through it.

Get back to life. The pain never really evaporates. The goal is to make it just one thing that defines you as opposed to the only thing. Allow it to become one thing among an increasingly larger number of things. Thus, the goal is to live. This is not a rehearsal! You only get one shot. The more you believe that and go carve out good experiences and enjoy good relationships, the more the grief is understandable and bearable. As you accumulate more life, you gain the perspective I noted earlier. Grief doesn't really leave, but you can learn from it and live with it more effectively as you continue to experience good things in your life.

Now it's your turn to try. Time to get to livin! I believe what I just wrote to you. I'm trying to make it happen myself. Will you join me?

[Dr. Todd Dewett](#) is one of the world's most watched leadership personalities: a thought leader, an authenticity expert, best-selling author, top global instructor at LinkedIn Learning, a TEDx speaker, and an Inc. Magazine Top 100 leadership speaker. Todd can be reached at todd@drdewett.com

Why Q4 Is the Smartest Quarter for Recruiting in Professional Services

By J. James O'Malley, *Former Andersen National Director of Experience Recruiting, Jim is Managing Director at Kensington International Executive Search*

The cliché about the fourth quarter in recruiting is that “everything slows down.” Many assume accounting and advisory firms are too deep in audits, tax planning, and year-end close to think about hiring. In truth, Q4 is one of the best times to recruit if you know where to focus.

A few realities to consider:

- **Year-end drives clarity.** Firm leaders finalize forecasts, promotions, and bonus pools. They know which roles they must fill to start Q1 strong.
- **Budget urgency creates momentum.** Open positions often need to be approved or filled before fiscal year-end. Recruiters who stay close to finance and HR teams turn that pressure into decisions.
- **Top performers reassess their path.** As utilization peaks and planning season begins, partners and senior managers often start questioning long-term growth or equity potential. This is prime time for discreet outreach.
- **Client demand shapes hiring.** Advisory practices ramp up in areas like transaction support, performance improvement, and technology integration as clients prepare for M&A or transformation in the new year.

- **Pipeline today, payoff tomorrow.** Building relationships in Q4 means firms hit January with ready shortlists when leadership bandwidth increases.

Q4 doesn't slow recruitment in accounting and advisory firms. It shifts the focus from volume to precision—reading, timing, motivation, and firm dynamics to stay a quarter ahead.

You also see more clarity in client needs during this period. Many firms assess upcoming client portfolios and recognize capability gaps. Practices tied to AI, digital transformation, and deal advisory often emerge as investment priorities for the coming year. Recruiters who align talent conversations with those priorities gain credibility and early access to searches before they are public.

Another overlooked advantage is candidate availability. Senior professionals often use the quieter holiday window to reflect, update resumes, and respond to outreach they ignored midyear. They are more open to conversations about culture, leadership, and growth when deadlines ease.

The best recruiters use Q4 to deepen relationships, not push transactions. They engage in planning discussions with clients, gather intelligence on upcoming needs, and position themselves as strategic partners. By January, they are already several steps ahead, armed with insight, warm candidates, and credibility built during the toughest quarter of the year.

Recruiting in Q4 is not about waiting for the market to rebound. It is about using the season's rhythm to anticipate where demand will rise next—and being ready when it does. If you are ready to talk about how getting started on a search in Q4 will have a material impact on your 2026 please contact me at jomalley@ki-search.com.

[J. James O'Malley](#) is a managing director at Kensington International Executive Search. For 30+ years, Jim has developed talent acquisition solutions to ensure that leadership talent aligns with changing business needs. Jim has served: Private Equity and their portfolio clients across all industries in addition to his background with Management Consulting firms, Architecture, Engineering, Accounting, Tax and Law firms in addition to IT, Healthcare, Operations and Supply Chain consultancies. He also helps large Commercial, Consumer and Private Banks with their hiring needs.

Three Proven LinkedIn Job Search Strategies That Will Make a Big Difference

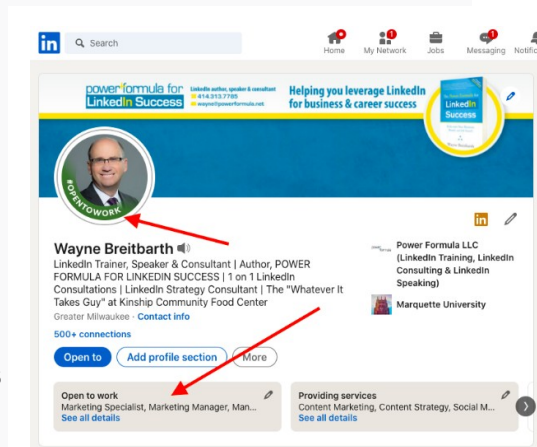
By Wayne Breitbarth, *Andersen Alumnus and CEO-Power Formula LLC (Author of "The Power Formula for LinkedIn Success: Kick-Start Your Business, Brand and Job Search")*

Frustrated in your Job Search here's three proven LinkedIn job search strategies that will make a big difference

1. Enable the *Open to Work* feature on your LinkedIn profile

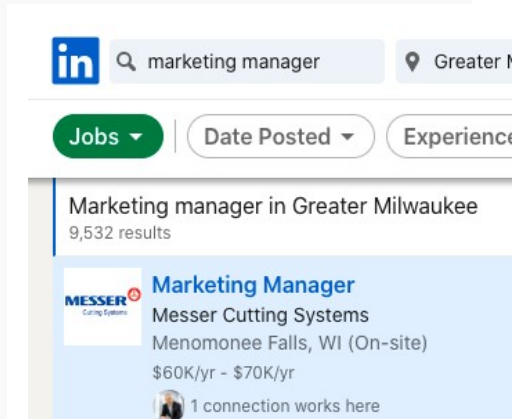
Lots of job seekers didn't even notice when this feature became available a few years ago. If you're one of those people, you better head to your settings ASAP and get this set up correctly. It won't take more than five minutes.

You can choose five specific job titles and locations you're interested in as well as the type of job (full-time, part-time, contract, etc.). And it's your decision whether you show this information on your profile or hide it. Learn how to do it [here](#).



2. Create LinkedIn Job Alerts for the right jobs and the right companies. You can now set specific job alerts for the companies you're interested in and notify those companies' recruiters that you're interested. This capability showed up without much fanfare last year, and it's a real game-changer.

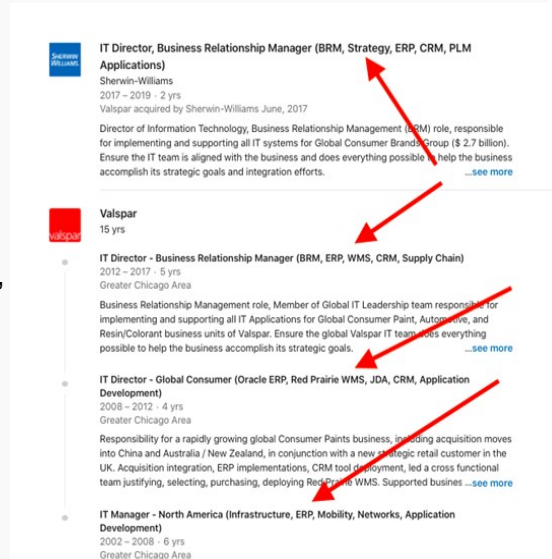
This may take you ten minutes, but when you're done you'll begin receiving notifications for the right jobs (not just the jobs LinkedIn thinks are right for you), and recruiters at your target companies may actually reach out to you directly. [Here](#) is a LinkedIn article that will take you through the steps.



3. Add the right keywords in the right places on your LinkedIn profile

Simply put, LinkedIn is just one big database of people's profiles (resumes on steroids). When recruiters and HR professionals are performing specific searches for people like you, they use keywords to narrow their searches to the very best candidates. These keywords are typically things like job titles, skills, schools, industries, etc. The search results they get from LinkedIn are in an order that LinkedIn calls "relevancy to the searcher."

In order to get near the top of their searches, you have to be more relevant to them than the other people on the search results list. The easiest way to become more relevant is to add the right keywords (important words in job postings) to the right sections of your LinkedIn profile.



Based on my experience of [working with thousands of job seekers](#) over the years, placing those words in your Headline, Job Titles, and Skills sections will improve your position in the search results in just minutes.

There you have it—three simple LinkedIn steps that in just 30 minutes should improve your chances of being included on the short list of candidates who get an interview.

[Wayne Breitbarth](#) is a nationally recognized LinkedIn consultant, speaker, and trainer. I have helped more than 100,000 business people—from entry level to CEO—understand how to effectively use LinkedIn.

SPECIAL OFFER

If you'd like me to help you capitalize on this and other money-making LinkedIn strategies, plus provide an in-depth critique of your LinkedIn profile, [sign up](#) for a one-hour, one-on-one virtual consultation with me for the significantly reduced rate of \$197.

Book your personal session today at <https://www.powerformula.net/one-on-one-linkedin-consultation>.

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<https://www.lenovo.com/us/en/andersenalumni>



Long Term Care - Insurance Coverage

70% of Americans over 65 will need some form of long-term care. And that care will be expensive. According to a recent survey, the cost for long term care can currently range from \$48,000 a year for home care to \$98,000 a year for a private room in a nursing home; and costs are increasing every day. Planning for these expenses with long term care insurance can help you maintain your lifestyle, protect your assets and savings, and give you the options necessary to receive care and services.

BPB Associates of Atlanta has been helping families like yours with their extended health care planning needs for 33 years and has negotiated special discount carrier pricing for Andersen Alumni members. Click here for more information: www.bpbassociates.com/andersenalumni/LTC

International Travel - Medjet Assist

Medjet provides reduced annual rates for its Air Medical Transfer membership program on a voluntary purchase basis to North American members affiliated with *Andersen Alumni Association*. Medjet provides single point coordination for the safety and protection of organizational clients and individuals/families as they travel for personal or business reasons - domestically and abroad. Zero cost beyond the membership fee for services coordinated by Medjet in medically transporting a member back to a home country hospital of their choice in time of need.

Medjet also offers an optional membership upgrade branded as Medjet Horizon that provides (among multiple membership benefits) a 24/7 Crisis Response Center for **Travel Security and Crisis Response** consultation and coordinated in-country services.

Learn More/Enroll? Persons from the U.S., Canada or Mexico can visit Medjet at www.Medjet.com/Andersen or call Medjet at 1.800.527.7478 or 1.205.595.6626. Reference Andersen Alumni if calling. Enroll prior to travel. Reduced Medjet annual membership rates for persons from North America under age 75 start at \$250. Multi-year and short-term rates are also available. Rules and Regulations available online and provided with Member ID cards.

Social Media: Association's LinkedIn Group (Join), Company (Follow) and Facebook Fan Page (Like)

Social Media is a great way for us to stay connected. To request the Association Status be added to your LinkedIn Profile click on the following URL to JOIN:

<http://www.linkedin.com/e/gis/38306/6E0CB25BC94E>

Additionally, you can "FOLLOW" the Association by clicking on the following URL:

http://www.linkedin.com/company/andersen-alumni-association?trk=tabs_biz_home

To "JOIN" our new Facebook fan page simply click on the following:

<http://www.facebook.com/pages/Andersen-Alumni/182112725168442>