



ANDERSEN
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Straight Thoughts, Straight Talk

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Editorial

As I prepare to write this editorial, I am watching the Masters. Tiger is in control and will win his fifth Masters and his first major tournament in eleven years. It is hard to believe it has been that long since Tiger dominated the PGA. What an amazing decade it has been since.

I am not a Tiger fan, but I wanted him to win. He is good for the sport. Every sport needs someone to root for and almost just as important, someone to root against. For me that example was set in the 70's and 80's Olympics. Even though I was often watching some obscure sport, it felt like world peace was held in the balance when an American athlete was competing against a Soviet athlete. It gave the event far more importance than it

rightly deserved. Quite honestly, the Olympics have not been the same since the good vs evil theme has dissipated.

However, the Tiger win does not feel like good vs. evil. Rather, it feels like a story of redemption. Tiger's fall from the pinnacle was public and ugly. It was the fodder of late night tv jokes and countless tabloids. For the next ten plus years he battled embarrassment, four back surgeries and the rise of younger golfers who were anxious to take his place. He did not give up. He never gave up.

As Tiger walked to the 18th green with victory almost assuredly in his grasp, he never cracked a smile. His face was stoic, almost grim. I suspect he could not believe it himself. He had done it. He was not going to let anything stand in his way. He was back on top. He was getting his fifth green jacket.

I am hesitant to make athletes out to be heroes, but in this case Tiger taught me a lesson. Life will have its ups and downs. Friends may abandon you. Your career may seemingly be in ruins. No one else may think you can rise again. Today we saw that with sheer determination you can rise above your mistakes. You can be a winner, again. Thanks Tiger.

As always, we need your help to further strengthen and maintain our Andersen Alumni network. Please leverage our Social Media Presence and LIKE our Facebook page and JOIN our LinkedIn network, and lastly you can FOLLOW us on LinkedIn as well.

Sincerely,
Kirk Hancock
Editor

Comfort Zones

By Ed Maier, *Former Andersen Partner*

When you wake up in the morning, do you follow a consistent pattern as you prepare for your day? Do you have a routine, daily exercise program? Do you enjoy a favorite breakfast at a familiar restaurant you frequent? Do you find that you get back and forth to your place of work in the same manner, along the same route, day in and day out?

Thinking about this on a grander scale, have you lived in the same community for many, many years? Do you maintain a consistent circle of friends? Do you regularly frequent the same restaurants or sports or entertainment venues? Do you read books the same way today as you read them when you were in grammar school? That is, by picking up a hard or soft copy of bound pages and reading them? Or do you swipe the pages in your Kindle or iPad?

Do you work for the same company that you began working for when you came out of college, high school or the military service? Or, if not for the same company are you working in the same type of business or organization or profession? When you do your work do you use the same tools, devices, and resources repeatedly?

Do you travel to the same or similar locations on vacation every year, or with regular consistency? Are there personal hideaways or sanctuaries in your home or your neighborhood or even your place of work that you seek out from time to time?

All these elements of life are your habits. We all have them. Some are conscious. Some are unconscious. According to Dictionary.com, habits are: (1) An acquired behavior pattern regularly followed until it has become almost involuntary (e.g., the habit of looking both ways before crossing the street); or (2) A customary practice or use, (e.g., Daily bathing is an American habit -- Author's note: for the most part); (3) A particular practice, custom, or usage (e.g., the habit of shaking hands); (4) A dominant or regular disposition or tendency; a prevailing character or quality (e.g., She has a habit of looking at the bright side of things) (See www.dictionary.com).

On a broader scale these habitual behaviors are your “comfort zones”. They are the routine patterns you follow in living out the different phases of your life. Your comfort zones are the patterns of behavior that you follow—voluntarily or involuntarily—to minimize risk in your life. When you step outside your comfort zone it can increase your stress or anxiety. Experts in human behavior will tell you that staying in your comfort zone can result in a steady level of performance. However, in order to increase, maximize or change your performance, you need a certain level of stress or anxiety to help you achieve that new level or different direction. In other words, you need to break out of your comfort zone. I am not an expert in human behavior. But I do have a great example of my recent experience in getting out of one of my own comfort zones. Perhaps it will encourage and help you to move out of one of your own.

Throughout my professional career, I have always done some writing. These were mostly memoranda and other papers related to the business I was in – usually, some issue in the accounting world. All these materials were for a limited audience – generally, clients or other members of our team. Several years ago, I was asked to make a contribution to this newsletter in the form of an article. Up until that time, I had never written for a broader, more general audience. I was nervous about it at first, perhaps even overly cautious. After all, my thoughts were going to be read by many people I did not know and never had worked with. What could I possibly write that would interest others? But since I was responding to a request from a colleague, I decided to go ahead with it. That led to me writing for this publication every quarter since my initial article. I am now over forty articles into this process. But I still have difficulty getting out of my comfort zone each quarter to: (a) generate an idea that I think would be of interest, and (b) put my thoughts about that idea in writing for you readers.

From time-to-time, some of you have contacted me and said: “I enjoy some of the subjects you write about—have you ever thought about writing a book?” While I did not start writing these quarterlies with that in mind, the thought kept coming back to me. I generally dismissed it because it gave rise to some nervousness, apprehension and fear -- the same feelings I had when I began writing my first newsletter article. But eventually, I

decided to step out of my comfort zone and write a book. Because of taking that step, I am very close to publishing my first, and most likely only, one. The goal is to have it out on Amazon.com next month. I will reach out to all of you with more about that later. There are some tremendously successful people in the world who bravely and fearlessly jump from one comfort zone to another. If you are that type of person, that's great. I am not. But I have learned to consider the following when I decide to push the limits of one of my own comfort zones and break out of it:

1. You need to have a plan. This is essential to your success. I really didn't have one at first. But as I struggled with the concept of writing a book, I eventually pulled one together. It included ideas like what did I want to talk about; what did I not want to talk about; how many chapters did I wish to create; how long should each chapter be; whether or not each chapter followed a particular structural formula, when did I want to accomplish this, and other things. I had to decide to self-publish or not; I learned about purchasing ISBN's, applying to the Library of Congress, filing a copyright application – all things I did not know before and which I found out were not that complicated.
2. Get some skilled help. If you are doing something outside of your comfort zone, it is more than likely something you have not done before or have not done very well. I met with other authors who had done similar projects. I found an editor who turned out to be a godsend. I am certain that I would not have finished this project without her. So, part of your plan should be to find some skilled help. It will enhance your opportunity for success.
3. Create a timeframe and a schedule to follow. Set interim goals and a timetable. And follow it. I did not do this very well. As a result, this project has taken longer than it probably should have. When I did set a timeframe and followed it, my focus improved.
4. Don't be afraid to ask others for help along the way when something comes up that you are not familiar with. In my case there were several things related to self-publishing that I needed assistance with and resources were out there to help. I just needed to ask.
5. When doubts creep in about achieving your goal – and they will -- remember those times in your past that you successfully moved out of a familiar comfort zone and how positive the results were. Reflect on what you did, the challenge you had and how you completed it. Adapt those techniques to your current project and move on toward your goal.
6. As you have accomplishments along the way — and you will -- celebrate them. Very often when you are trying to move out of one of your comfort zones, there is no one along for the ride; there is no one “keeping score”. You are the only one

who knows of your accomplishment. So, celebrate when you hit specific milestones.

We live most of our lives in our comfort zones. To move out of them can be challenging, even scary; so, I hope these thoughts are helpful to you. Pick a zone that you are comfortable in and switch lanes. I can't guarantee it will be fun. But you will learn something about yourself. Go for it.

As always, I am interested in your thoughts. I would love to hear some of your own comfort zone memories and reminiscences. Write me at ed@thinkstraighttalkstraight.com.

And, watch for my book, *Think Straight. Talk Straight.*, coming your way from Amazon soon!

New Book Release by Andersen Alumnus Andrew S Kane Three Bridges - Adulthood is Easy Until Life Intervenes

By Andrew S. Kane, Former Managing Partner Los Angeles 1974-2002, today Andy is an Author and Advisor, Co-Founder MKW Advisors and Co-Founder Spencer Legacy Group and can be reached at ask@andrewskane.com

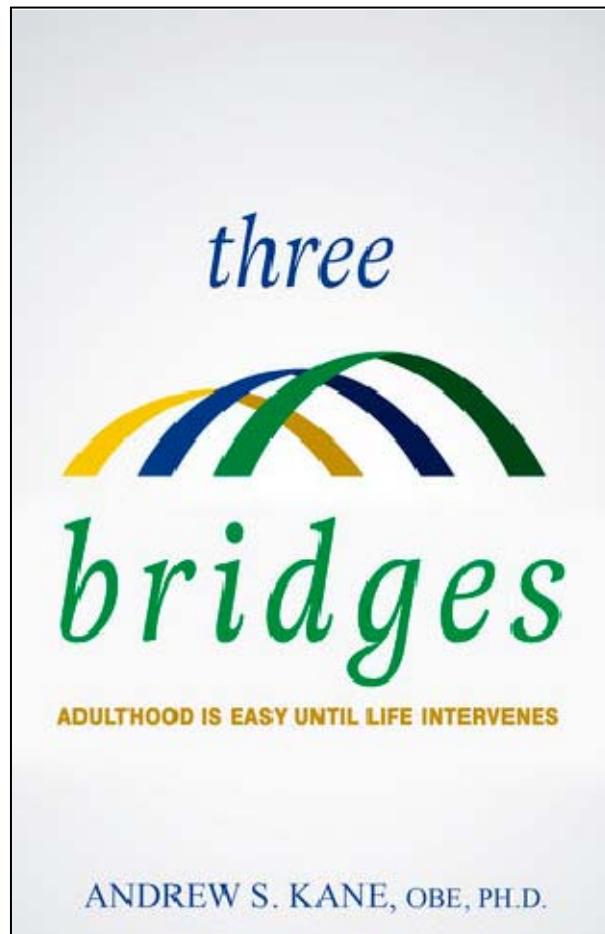
For much of this decade Andy was immersed in completing first a master's degree in Human Development which was then followed by a PhD in the same field of Human Development. His doctoral thesis was on the subject midlife. His research covered people in both the US and Europe, led him to become globally certified in positive psychology and writing his book.

Over the past several years, as he experienced the unexpected twists and turns of adulthood, it led him to dive more in depth about ways to prepare and adapt to life's surprises. Some of his life events were a shock, such as the collapse of Arthur Andersen and more profoundly the death of his daughter from cancer. Yet he was somehow able to leverage the resilience he built, develop his coping mechanisms, prevail and grow. Now, with [*Three Bridges - Adulthood is Easy Until Life Intervenes.*](#), Andy shares his expertise and approach on how to navigate adulthood including enhancing one's well-being, and address midlife among numerous topics I cover.

“No one can build you the bridge on which you, and only you, must cross the river of life. There may be countless trails and bridges and demigods who would gladly carry you across: but only at the price of pawning and forgoing yourself. There is one path in the world that no one can walk but you. Where does it lead? Don't ask, walk!”

— NIETZSCHE

Three Bridges is about navigating through your adulthood, enhancing your wellbeing and addressing your midlife.



Everyone has certain expectations of what their life may be like and how it will unfold. Yet, if there is one certainty I have come to realize, it is that life does not always go according to plan. I have experienced and understood this firsthand. I have lost my daughter to cancer, lost my my career and capital while I was a partner at Arthur Andersen (due to its collapse due to Enron in 2002), suffered the pains of a divorce and been the caregiver to too many. Yet somehow, I found myself to be resilient throughout my adulthood, found myself able to adapt to setbacks, reinvented my career and prospered, immigrated and flourished. How was all of this possible? I completed a combined masters and doctorate degrees focused on human development, to research and learn how positive psychology can help you flourish and build your resilience. I came to understand how brains can be rewired, appreciate the beauty of neuroplasticity and understand how to reinvent yourself when adversity or opportunity presents itself and you need to adapt. This is my story, shared in my book, along with my metaphorical explanations of three bridges we cross in adulthood, the pressures we face and how to overcome them. I especially found midlife to be the most intense challenge and have addressed why and how to do this. My three metaphorical bridges generally correspond

to ages 20-40, 40-60 and adulthood after age 60, but they should not be viewed as specific age related but more stage based. I have termed these three bridges as:

- The Bridge of Accumulating Responsibilities
- The Midlife Bridge and
- The Bridge of Decumulation and Simplicity

I have linked the journey across these three bridges to why and how it is important to enhance your wellbeing by embracing positive psychology, so you can thrive, regardless of the stage of adulthood you are in. I am sure that from my own deep losses I was not the only one to ask a deep and personal question, “What’s next?”

Since my daughter died in 2008, I have been on my own thoughtful journey. I wrote my book to give back what I have learnt and experienced during my adulthood and help others navigate their lives, especially during midlife. The lessons I have learnt from grief and loss was the need for a deeper and more thoughtful introspection, resulting in being more authentic, taking off the “mask” that conceals our true identity and how to be happier. Now, over ten years after my daughter’s death, I hope my book may help others think about how to successfully navigate their adulthood, traverse my three metaphoric bridges, and enhance their own wellbeing.

A Must Have Resource for IT Procurement, 3rd Party Maintenance – The Ultimate Guide

By **Ken Peck**, *CEO of Smart 3rd Party, and friend of Andersen Alumni*

Attention CFO’s, Controllars and Procurement Professionals: Having a hard time keeping your IT maintenance costs in line?

Faced with replacing equipment that seems to be working just fine, but the OEM says they will only support it at an exorbitant cost? Does it seem like the only options you have are take it or leave it?

The fact is, there are two sides to the hardware maintenance coin: the OEM side shows what is often believed to be the safest (and the most familiar) choice, while the TPM side reveals deep cost savings – that are often mistakenly said to come with a risk. But is that reality?

Do you want to know the truth about third-party maintenance and what it can do for your enterprise? This book will tell you everything you need to know to make smart third-party maintenance decisions. To get your complimentary copy of the book [click here](#).

NEW OPPORTUNITY... Partners Wanted “stay in the game”

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Make Your Documents Shine, 32 Tips

By **Kim Schlossberg**, *Andersen Alumnus Marketing Manager 1992-2002 and owner of Kim Schlossberg Designs*

I do a lot of editing and proofreading of all types of documents (blog posts, websites, marketing materials, proposals, articles, books). Whether I'm editing my own work or something for a client I take these 32 little steps to make the writing as clear and professional as possible.



1. **Purpose** — What is the purpose of this document? Is it meant to teach, inspire, sell? As you're editing it, check to see how well it's fulfilling that intention.
2. **Spelling** — Check for spelling and typographical errors. Run spell check, but don't blindly trust it.

3. **Homonyms** — People have been getting very confused about words that sound alike. So double check that you're using the right one every time. Some examples are: you're/your, right/write, its/it's, led/lead, there/their/they're, here/hear. Do not trust your software to know the difference – Microsoft Word often suggests changing words that are already correct.
4. **Grammar and sentence structure** —If a sentence is too awkward, consider totally rewording it, or breaking it into two or more sentences.
5. **Case and tense** – Be consistent about present, past, and future tense, and in using 1st, 2nd or 3rd person language. I'm often guilty of going back and forth between using "I" and "we."
6. **Passive voice** – If at all possible, put a subject in every sentence. "I made a mistake" is so much more powerful than "mistakes were made."
7. **Serial comma** — Be consistent about your use of the serial comma (also known as "Oxford comma") – the comma before "and" in a list of three or more items.
8. **Graphics** — Proofread text within graphics. You might not be able to correct them, but if you see problems, insert a comment stating the problems.
9. **Possessives** — Make sure the apostrophe is there and in the right place (unless it's a pronoun that doesn't get an apostrophe for the possessive form).
10. **Plurals** – No apostrophe unless they are also possessive.
 - o Clients – more than one client
 - o Client's – it belongs to one client
 - o Clients' – it belongs to more than one client
11. **Bullet grammar** – Write bullets so they have parallel grammatical construction within the set of bullets. Be consistent about the use of full sentences vs. phrases, tenses, etc. Make sure they all work well with any lead-in text. Make sure they're consistently capitalized and punctuated within the set of bullets.
12. **Bullet design** – Make sure bullet characters, indents, and spacing are consistent.
13. **Dashes** — Make sure hyphens, n-dashes and m-dashes are used appropriately.
 - o Hyphens go in hyphenated words, with no spacing around the symbol.
 - o N-dashes go in a range of numbers, times, or dates (eight – ten).
 - o M-dashes indicate an abrupt change of thought in a sentence — like this.
14. **Text around graphics** — Be careful editing in or around boxed text or graphics; the text or graphic could fly across the document to someplace random.
15. **Notes** — Make sure asterisks and footnotes match corresponding notes.
16. **Double spaces** —Double spaces after periods are a holdover from typewriters. Delete them wherever possible. But be careful using *search & replace* — someone might have used a series of spaces instead of the tab key.
17. **Tabs** – Use the tab key and set your tab stops where they need to be to avoid all kinds of formatting errors down the road.
18. **Formatting** — Clean up formatting for consistency between like types of information. Consider font, size, style, spacing before and after, and line spacing.
19. **Count every number** — Every time you see a number, count what it refers to. For example, a list with a lead-in sentence like "the following four elements" — make sure there are really four. It's very common to add or delete a list item without correcting the lead-in.
20. **Math** — Check the math even when it's given to you by a CPA.

21. **Numbers** — Spell out one through nine, and any number at the beginning of a sentence. Use numerals for anything larger.
22. **Methodologies and other numbered lists** — make sure all the steps of the methodology match every time they are mentioned (names, numbers, etc.). Check spelling, capitalization, etc.
23. **Quotations** — Sometimes publicly available quotes are included in documents (from publications, for example). If quotes are verifiable on the web, try to do so, especially if they don't look right. Don't "fix" client reference quotes, but if it looks like it was typed incorrectly, ask the client to double check from their source document. Insert a comment if something doesn't look right.
24. **Jargon** — Try to minimize jargon and use standard English wherever possible.
25. **Discrepancies** — Sometimes an editor can't tell how discrepancies should be corrected; all we can do is point out that there is a discrepancy. Insert a comment stating the problem. (For example – a workshop referred to as 2 hours one place and 4 hours someplace else. We won't know which is true, but we will be able to tell they're not the same.)
26. **Quotation marks and parenthesis** — Make sure that everything that is opened, is then closed.
27. **Audience focus** — Try to keep the focus on the ultimate reader, client, or prospect, and not on internal company stuff. I try to read everything from the customer's point of view.
28. **Sales messaging** — Did the document hit the strongest sales messaging? Did we take advantage of every opportunity to show a benefit statement?
29. **Focus** — Does the document emphasize the topics of most value to the audience?
30. **Consistency** — Check spelling of names, companies, steps of methodology, names of products, client, etc. throughout document.
31. **Clarity** — Do we explain the "big picture" among the details? How much does the likely reader know about the industry and the content? Will the average reader be able to easily understand the document, or should we fill in some extra background information, define some terms, etc.?
32. **Voice** – When documents are written by different people, or assembled from smaller pieces, the tone of voice and style of language may not be consistent. Review the whole document with the goal of making the voice consistent throughout.

As writers, we know what we are trying to say, and we automatically see it there on the page, whether it's really there or not. It's very easy to overlook our own errors. That's why I try to get another person – a fresh set of eyes – to look over everything I write. Murphy's Law dictates that if I write an article about editing and proofreading, I'll make an error. I'll try not to, and I'll get someone else to proofread this for me, but still, I know I'm on shaky ground. So – I owe a cup of coffee to the first person to catch an error in this article.

Changing the Face of Finance

By **Marianela Collado, CPA/PFS, CFP®**, *Andersen Alumnus NY Office Private Client Services*

Since my time at Andersen, my career path has been defined by my passion for helping others. With that focus in mind, I've ascended to my current role as co-owner and CEO of Tobias Financial Advisors, a growing, fee-only wealth management firm in Plantation, Fla. I'm always looking for opportunities to make real and lasting impacts in the lives of our clients and the professionals at our firm. I love encouraging them to take hold of their financial worlds, professional and personal.

While I was at Andersen, I learned the importance of quality teamwork. That lesson has stayed with me ever since. We were able to uncover powerful results for clients when we worked together to find tax and other technical solutions to address their financial concerns.

When I took the leadership reins at Tobias Financial Advisors in 2017, collaboration was one of the first areas I focused on. Collaborative teams are always in the clients' best interest; as advisors, we come together to share best practices and client insights, so we can develop truly creative and customized solutions for them. We reach out to clients' other professional contacts, such as attorneys and CPAs, to learn more about how we can serve their specific situations. It's about working together to best serve our clients. I like to remind everyone — we are all on the same side, the side of upholding a fiduciary interest for our clients.

I still remember many of the Andersen colleagues who inspired me to see potential in myself and look past any industry stereotypes or assumptions. From those days, I learned my work is a reflection of me and everything that leaves my desk. Whether it's for a client or not, it should always be my best, putting our firm's best foot forward. As I mentor other women in our field, I remind them it's not about proving themselves as women, but just proving themselves to be worthy of the work and the seat they are sitting in.

One of our priorities at Tobias Financial Advisors is empowering women and future generations to take leadership roles in finance. This may be as lead advisors or in the C-Suite. As a firm, we are investing in the future of women to grow the base number of female leaders and change the statistics regarding women in our industry over the years.

In 2018, I joined Women Leading Broward to invest in my own leadership skills and further the development of female leadership within our own firm. As women leaders, we sometimes hold ourselves back. But we do need to take time to explore and vocalize strengths. This is where we add value. Only then can we use those strengths to become better leaders.

One thing I've learned about myself since leaving Andersen is my ability to recognize what other people are good at and delegate roles to them that harness their strengths. Looking back, even when I didn't see it, I've been using that skill throughout my career, encouraging others to take hold of what they are best at. As the CEO at Tobias Financial Advisors, I use that skill to build a team that is fully focused on what they prefer doing and on doing their best at it. I've taken on the role of an orchestra conductor and I love to see the harmony it creates.

As a leader who is investing in my own strengths, I can cultivate a happier, more effective company culture. This gives us the opportunity to attract and retain amazing talent and provide a place where they can grow in their roles. The clients feel it too and are even more confident sharing their lives with us.

Looking back on those years at Andersen, I see so many characteristics in myself that led to my growth there and impacted my development as a leader in this industry. The confidence and client-focus I gained laid a strong foundation. In 2017, I was recognized by the American Institute of CPAs as one of 16 CPAs age 40 and under with the Personal Financial Planning Standing Ovation award.

I'm so grateful for the experiences and connections I made at Andersen that prepared me for where I am today.

Fool's Gold

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

I have never been a big fan of April Fool's Day for one simple reason. Yep, you guessed it. I most always seem to forget and fall for the foolishness! This year was no exception. I have some friends that live for their intentional annual creative misdirects. And then there are those who create them each and every day. Knowingly – or unknowingly.



With a quick click to the dictionary, one would find that a “fool” is *a person who lacks judgment or sense*. While that may be true, it might raise the question as to what causes that “lack” to exist. I think a more complete definition would proclaim that a fool simply lacks *awareness*. That, in fact, could be applicable to the one making the fool – as well as the one being a fool.

In so many ways, they are one in the same.

Awareness has the potential to unleash everything. Yet, we must first be willing to unleash awareness. I would suggest that this unleashing is both a decision and a process. It is a metaphorical combination of both *letting go* and of *opening our eyes*. You will find that in doing both, that one will serve the other.

During the first of my eventual three retinal detachments, I realized *it's amazing what you will see when you are forced to keep your eyes closed for several days in a row*. I realize that awareness and metaphors can sound vague and soft in a “get-it-done-now” kind of world. At the same time, one could wonder if a “get-it-done-now” kind of world can lead to a lot of foolishness and eventually a world of fools.

In most any arena, great disruptions aren't inspired by those who are speeding to get it all done. These disruptions are created by those who step back from all the chaos to unleash a creation born from their sense of awareness. Those who think awareness is complete foolishness in the world of business, are often the fools who are eventually left behind.

At some level, we are all fools. Stupid in our areas of unawareness – and ironically found most often in the areas where we feel most certain. I find that in my own work every day.

Paradoxically, awareness is found through the gift of uncertainty.

Uncertainty opens the door to wonder — and wonder diminishes the resistance, we unknowing hold, to awareness.

I was recently listening to an audio book by one of my favorites, Jim Finley. He was sharing a conversation he was having with Sister Macrina Wiederkehr (author of *A Tree Full of Angels*) about certainty. From their dialogue, Jim shared three wonderful insights from Macrina:

- The things that I used to be certain of, I'm no longer certain of.
- The things I used to be certain of, that I'm still certain of, I am no longer certain of — in the way I used to be certain of them
- And, although I can't be certain, I can be fairly certain that this is not going to stop.

Ironically, in a foolish world, the ones who experience the most awareness — are the ones who are most likely to be called the fools. It appears the world we live in has a way of playing its own April Fools' joke on the unaware.

What “certainty” have you held, from which you have experienced a freedom in letting go? What foolish “certainty” may you still be grasping?

As always, I'd love for you to share your thoughts.

John G. Blumberg is an Andersen Alumni, a national speaker and author of several books. His books are available on Amazon and at major bookstores. You can connect with John at <http://www.blumbergroi.com/connect>

Quick Ways to Spring Clean Your LinkedIn Profile

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”)*

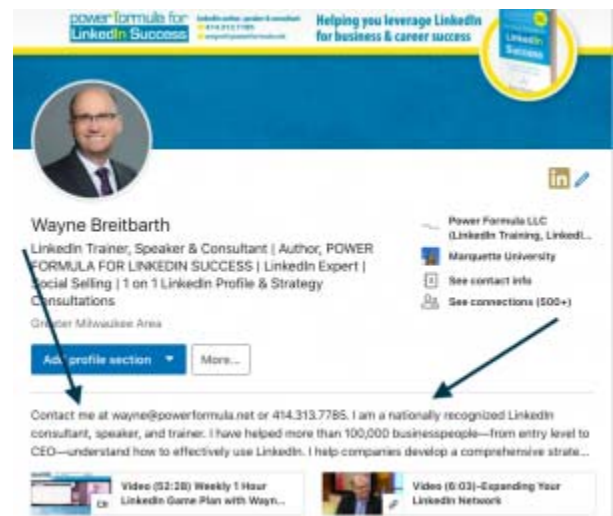


Spring is always a great time to take a fresh look at your professional image, and your LinkedIn profile is the perfect place to start.

Here are ten easy ways to brush off the cobwebs and whip your LinkedIn profile into shape this spring.

1. Headline, Profile Photo and Background Photo. More people will see your [headline](#), profile photo, and background photo than any other part of your profile. Make a good first impression by including a creative, keyword-filled headline, professional quality headshot, and a background that positively represents your personal brand.

2. Summary. Use the [Summary section](#) to sell yourself. Think of it as your cover letter or elevator speech. With the current profile format, the first 300 characters of your Summary are going to be read often; so spruce it up and make it shine.



3. Experience and Education. Don't skimp here. Provide details of each job you've held (you have up to 2,000 characters available per job or education entry) and include your formal education as well as industry-specific courses, workshops, or seminars you've attended.

4. Keywords. You'll be more likely to come up in searches if you include the [keywords](#) people typically use when trying to find someone like you. Put them in your Headline, Job Experience Titles, and the Skills & Endorsements section to receive the most benefit but avoid "stuffing" your profile with keywords or your credibility may be compromised.



5. Add Media. Not only will [adding media](#) help your profile be more visually interesting, but it's a great way to get people to visit your website, check out some of your best work examples, and get copies of important documents, like your resume, your customer testimonials, etc. You can add media to the Summary, Job Experience, and Education entries of your profile.

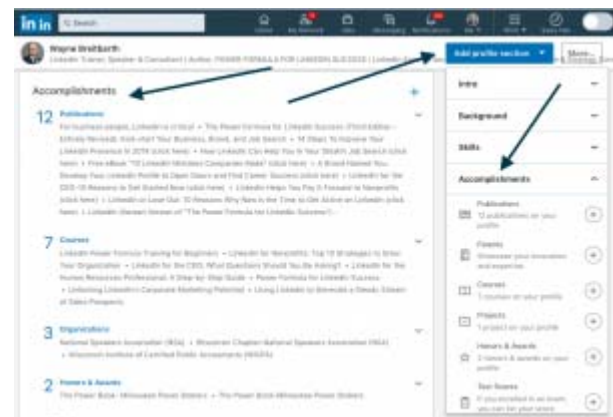
6. Recommendations. Get at least two current, impactful [recommendations](#). Your two most recent recommendations are nicely displayed. Note, however, that you cannot reorder them. The rest of your recommendations get buried in the *Show more* drawer; so consider grabbing the best quotes from your recommendations and placing them in the job entry that they are tied to.



7. Licenses and Certifications. These used to be subsections of the Accomplishments section, but they're now stand-alone sections, and they're higher in the profile layout. These designations you've earned could be the difference when a customer or employer

is comparing you to your competitors. LinkedIn users may also include them in their search criteria when they're looking for just the right professional.

8. Accomplishments. Don't be afraid to toot your own horn. Use all of the subsections in the [Accomplishments section](#) to set yourself apart from your competitors. Subsections currently include Publications, Patents, Courses, Projects, Honors & Awards, Test Scores, Languages, and Organizations.



9. Volunteer Experience. Everyone loves to work with people who genuinely care about others. Let the world know what organizations you support—and it will be great publicity for your favorite charitable group, too.

10. Calls to Action. You don't want people to just look at your profile—you want them to do something. Invite readers to watch a video, go to your website, or request a quote. It's easy to include [calls to action](#) in your Summary section, but you can creatively include them in other sections as well.

Clean up your LinkedIn profile this spring and get ready to watch your business bloom.

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Recruiting and Retaining Experienced Accounting Professionals

By J. James O'Malley, *Former Andersen National Director of Experience Recruiting, Jim is a Managing Director at Stanton Chase focused on helping professional service and financial service organizations with critical talent needs. For over 30 years, Jim has leveraged his passions for executive search, talent acquisition, workforce planning and analytics, and executive coaching to solve a variety of talent acquisition challenges. For more information and to contact Jim Click [Here](#).*

Recruiting experienced professionals has long been the Achilles heel for most accounting firms.

Keeping them can be equally agonizing, with overall industry turnover rates as high as 15 to 20 percent. Many of the largest firms have compensated by building large campus recruiting machines, but within the last two decades, even these big firms have struggled to grow and develop their own fast enough to keep pace with growth opportunities in the

market. The smaller firms, which are representative of the vast majority of public accounting, are also being profoundly impacted and, for all firms, the inability to hire experienced professionals is further exaggerated when it's time for succession and no one is ready to take over!

Accounting Today has spent significant time in the past focused on people issues within the profession. In 2016 they devoted a series of articles on "[20 days to a better firm](#)" and a few months prior to that, Paul N. Iannone wrote about the challenge in an article, "[Filling the Succession Gap](#)." Iannone pointed out that many smaller firms are being forced to put themselves up for sale or are being gobbled up by bigger firms simply because their bench of experienced leaders is thin. His point is spot on.

But, in my view, this is only part of the problem. Succession is important, particularly for the future of any firm, but what about the present? The dearth of experienced professionals has certainly contributed to the problems of succession, but frankly larger and more immediate problems loom when the clear majority of public accountancy firms can't:

- Compete for existing work due to lack of experienced staff;
- Execute on existing work, due to shortages of experienced staff or staff departing for other firms or the private sector;
- Perform the quality of work their clients should expect due to errors in work and missed deadlines

Sound familiar? If so, what can you do about it?

Remedies

Recruiting the experienced professional is both an art and science that very few firms have ever mastered. Some fail to commit the necessary resources and budgets to ensure they have the right staff at the right levels. Likewise, more often than not, firm leaders pay little attention to recruiting.

What needs to change matters for the future of our industry and the time to change is now. Accounting Today published my article "[To Mitigate Risk in Recruiting for Your Firm, Take These 3 Steps Now](#)" and the same principles I referred to in that piece about risk management can be applied to ensuring that you have enough experienced staff. Briefly, they are:

1. Allocate adequate budget for HR and recruiting

Firms often scrimp in their recruiting budgets, failing to realize that frugality can have the opposite effect in terms of opportunity loss. Your people are billable to the client. If you don't have enough people or can't recruit them fast enough, then that results in lost

opportunities. Recognize that each day a key position remains unfilled is another day without revenue coming in the door.

2. Monitor the state of your workforce

Task someone in your firm with accountability for your overall workforce as well as the skills to assess your talent. That individual should “own” workforce and succession planning, monitor key metrics such as retention rates, rate of retirements, as well as potential pipelines of new talent for all areas of your business. Responsibilities also need to include monitoring the rewards structure to be sure it is competitive. This position can be in operations, HR, finance or a firm leader.

3. Hire the right recruiters

Ensure that your recruiters are capable of assessing the technical qualifications and cultural fit of the individuals they recruit. It is absolutely critical that those who lead the recruitment function have the right people in place—with the right training—to do their jobs. Too often, rookie recruiters tasked with sourcing critical roles actually have little idea of what those jobs entail. If you can't hire or find the right resources, consider partnering with a recruiting consultant with an expertise in your profession.

How Do You Know It's Working?

It's often said that if you cannot measure something, you cannot improve it. Recruitment (as a subset of HR) has admittedly long lagged behind other functions in establishing meaningful performance metrics. Today, there is a shift in thinking. While metrics may help you evaluate the efficiency of your recruitment function, that's about it. What you really need to know is whether the work you do in recruiting talent is materially raising the bar on the quality of people joining your organization. That metric—and the one that really matters—is called quality of hire (QOH). The downside is that there is no “one-size-fits-all” algorithm to measure it. It will mean different things for each business and possibly even for each individual contributor within each business unit.

QOH is also pretty subjective. Do you base it on a performance evaluation system? When do you measure it? At six months into the job? Twelve months? Questions abound, but there are no easy answers since the metrics and measurement process must be tailored to your organization.

Once you've established this metric, ensure the process of tracking and analysis isn't overly complicated or unwieldy. Recruiting tools and technology have made this much easier. The same technologies can also support and enable decision-making for strategic workforce planning and can be used to gather critical talent-related business intelligence. In recent years, this has evolved into a profession right in front of our eyes.

What Does Meaningful Change Look Like?

As a result of applying these remedies and then measuring for success, your firm can become far more proficient in forecasting staffing shortages and ensuring that you have the right number of staff, seniors and managers now and in the future.

Beyond more precise forecasts, meaningful change also requires three additional strategies. First, firms must recognize that staffing cannot be done “just in time.” You need to recruit constantly; not just fill openings as they occur. You must get used to the notion that you will always be in recruitment mode.

Second, retaining this hard-to-find talent is critical, so firm leadership needs to devote more time and energy to the “people” side of the business than ever before. Investments need to be made for the continuous care, mentoring and development of staff.

Finally, firm leadership will need to take a hard look at opening their coffers and admitting partners sooner than what has occurred historically or suffer the consequences.

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