

Official Newsletter of the Andersen Alumni Association



Straight Thoughts, Straight Talk

"Serving Andersen Alumni Worldwide"

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#3 – Best Firms to Work For
Consulting Magazine's 2010 List
Best Firm to Work For / Best Firm to Work With



Editorial

Spring is here and 2013 is already off to a fast start. This year would have been Andersen's one hundred year anniversary and we have a new logo to commemorate our founding. That is a bittersweet anniversary. Andersen Alumni will be helping plan several regional alumni gatherings to celebrate the past and so that you can stay acquainted with your Andersen alumni community.

SAVE THE DATE: ONE FIRM ONE CELEBRATION September 26, 2013. We will follow with more information in the near future.

I think you will find the articles in this issue to be very informative. Our alumni wrote most of the articles. You will see some common Andersen cultural trends running through them. I know these values have played a huge part in shaping my firm. Take a few minutes to read them. You won't be disappointed. If you want to contribute an article in the future just let us know.

Graduation season is right around the corner. You may want to check the Lenovo pricing for Andersen Alumni. These are some great computers at a great price.

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 at <http://www.facebook.com/pages/Andersen-Alumni/182112725168442> and **JOIN** our LinkedIn network at <http://www.linkedin.com/e/gis/38306/6E0CB25BC94E> and lastly you can **FOLLOW** us at http://www.linkedin.com/company/andersen-alumni-association?trk=tabs_biz_home.

Sincerely,
Kirk Hancock

Coming Soon...

It's hard to believe but 2014 will be here before you know it... As such Andersen Alumni Association has partnered with Harris Connect to publish our quadrennial directory. This will be our 3rd edition Alumni Directory. Harris Connect published both the 1st and 2nd editions of the Alumni Directory in 2006 and 2010 respectively. Given the growth in our membership and Harris's quality work it was a natural choice. **NOTE:** Keep an eye out for the yellow Harris Connect update postcards that will be coming out later in the year and please encourage other alumni to do the same!

Attitude

by **Ed Maier**, *Former Andersen Partner*

Has anyone ever told you that you have a "bad attitude"? For that matter, has anyone ever told you that you have a "good attitude"?

When you were growing up, did you ever hear your mom say something like: "You better change that attitude, young lady (or young man)"? Do you remember how you responded? Did your "attitude" change in any dramatic way? Can anyone else cause you to change your attitude?

In a recent presentation, I posited the point of view that no one can change your attitude but you. It is yours and yours alone to manage, to control, to shape.

I am referring, of course, to your mental attitude. And your mental attitude is yours. Webster defines it as: “A mental position with regard to a fact or state; a feeling or emotion toward a fact or state.” (Source –Merriam-Webster Online Dictionary at www.merriam-webster.com”).

Since attitude is yours, it is your responsibility to manage it, to control it. How easy is that to do?

Let me pass along an idea that I learned a few years ago in a workshop I attended. This particular idea was presented by a colleague I worked with who has significant experience in the leadership development field. His name is Tim Kight and his company is Focus3. Tim taught me the following with respect to emotions; I have practiced it successfully to help manage and control my attitude in various situations.

Think about an event, any event. Whether it is bad or good, the event has occurred. At the moment the event occurs, your mind begins to tell you stories. The brain is an awesome organ. As many of you know, it is the most complex of the organs in our body. I am not going to try to explain how it works, because that is way above my pay grade. But I do know this. When I think about events that occur in my life, and I reflect on what happens in my mind when the event occurs, I acknowledge that my mind tells me stories. Let me give you an example and see if you can relate to this.

You are hard at work for several weeks on a major project proposal for a client or customer. You have been designated by your boss as the project leader. It is your responsibility to develop the proposal for delivery to the customer. It is now Friday afternoon of the week before you are supposed to meet with the customer and deliver the proposal. Your meeting with them is scheduled for the following Thursday. You gave your boss (let’s call him Albert) a draft of the proposal on Monday of this week and asked him to provide you with his comments by Wednesday at 500pm. He is already a day and a half late.

At 330pm, he walks into your office and declares: “Chad, I have some issues with this proposal draft you gave me. There are some serious holes in it. I need you to review my notes and make the necessary changes. I am leaving for the weekend, but you have to complete the edits by Monday morning and meet with me at 700am to finalize it. We are meeting with the customer at 1000am on Monday to review it. They had to push the date up because they have a problem at one of their manufacturing plants in South America. They are leaving Tuesday morning to deal with that. They called me earlier this week and told me we would have to move the date up. If you have to call any of your staff in over the weekend to help you fix this thing, feel free to do so. I need you to pull out the stops to get this finished by Monday morning.”

As you sit at your desk, dumbfounded by this turn of events, is your mind telling you stories? Do they go something like this?

“I can’t believe I let Albert do this to me again! Here we are, down to the wire, and he comes in with all of these last minute changes and new information! When I gave him my proposal draft, I specifically told him I needed his comments by Wednesday afternoon. If he would have given them to me at that time, I could have reviewed them with our staff, made the necessary changes and been ready for an earlier meeting with the client. Now, I have to call them all and ruin their weekends by bringing them in on Saturday, and possibly Sunday, to work on this. They have seen this happen to our department before and they are going to think I am a real jerk for letting it happen again! I am so mad at Albert, I could scream!”

“On top of that, Melanie (wife) is going to kill me. We made plans for a short getaway weekend beginning tonight. She has been working hard in her own job and has cleared the weekend on her calendar. We were going to take off for one of her favorite resorts, have a couple of nice rounds of golf together, maybe hit the spa and enjoy some nice, quiet evening dinners. Her mom and dad were looking forward to sitting with our kids and now they will be disappointed, too! Melanie is going to lay into me on this! I can hear her now! ‘You let Albert do this to you all the time. He has behaved like this many times before and you just roll over and take it! Now we have to give up our weekend plans to respond to him! On top of that, my mom and dad were so looking forward to sitting with the children! I can’t believe you let this happen—again!’”

By now, what kinds of feelings are coursing through your body? What has this event done to your attitude? What type of action will you take as a result of the feelings coming from your mind’s stories? Will you scream at Albert? Will you suppress your scream at Albert but take it out on the other drivers on your way home? Or, worse than that will you dump on your wife and kids when you walk in the door?

Let me point out that the event has not done anything to your attitude. Events don’t shape attitudes. Events don’t cause actions. You shape your attitude; you manage your emotions; you control your actions; no one else does. Here is an alternative example.

The same facts take place, only when Albert lays all of this at your feet, the stories in your mind go something like this: “I knew this would happen. This is classic Albert behavior. He has done this before. Oh, well, it is good that I alerted the staff a couple of days ago to the prospect that we may have to work this weekend on the proposal. I told them not to make plans for the weekend; we could not be sure that we would have it free; we would have to be ready for any changes from Albert or the customer. I am glad I did that. I am also glad that I alerted Melanie to the same possibility. Because this type of thing has happened before, we had backup for all of the plans we made this weekend. When I made our reservations at the resort, I checked on possible alternate dates. I also told her mom and dad that even if we have to cancel our plans, they can still take the kids. I would probably be working all day anyway. So as much as I hate making all of

these changes, it's not as bad as it could have been. Now, let me look at Albert's comments on the proposal and see how bad things really are."

In the second scenario, while the outcome will not result in Chad and Melanie having the weekend of their dreams, Chad's attitude will be more positive. And his reaction to Albert's last-minute antics will result in less anger and personal frustration. It doesn't make the entire situation better, and Chad may have to do something later to deal with Albert's perennially bad behavior and timing. But that is a different lesson for a different newsletter article.

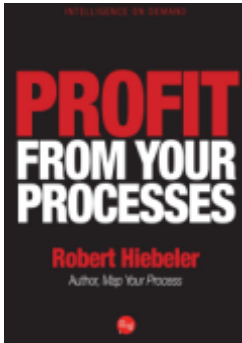
In summary, here is how I believe the mental process I described flows. The event takes place. Almost immediately with the event, your brain starts working in overdrive and your mind tells you stories. Right or wrong, fact or fiction, these stories are rushing through your mind. Feelings or emotions are aroused. Your physical persona reacts as the emotions rush through your body—your fists clench, your stomach tightens up, you begin to sweat, your breath comes more rapidly, your heart beats faster. You take action—you pound something, you throw something, you scream something. Event occurs; stories rush in; attitude changes; action takes place.

When I learned this simple process, I began to force myself to analyze the relationship of events and stories that occur with me more closely. As I looked back on them, I could understand the stories that my mind told me when the event occurred. I could also trace the impact of those stories on my attitude and actions. I have found that with analysis and practice, I can discipline myself to control the stories or make them more positive. At least I can make them less negative. This helps me maintain a "better attitude" and yields more positive actions. As I have suggested this to others, they have responded that it helps them also.

In closing, this is not a perfect process. And, I am not always in control of my attitude. I do not always manage it or my emotions well. But this process has helped me improve the way I do manage them. In addition, by forcing me to think along these lines, it also helps me plan to deal with certain events. In doing so, I create more positive stories. With more positive stories, I manage my attitude more appropriately. I hope you try it and it helps you.

Once again, I am interested in your thoughts. Is this helpful to you? Do you think you can use it in your own life? Please share your thoughts with me at ed@thinkstraighttalkstraight.com.

Profit From Your Processes



“Making an effort to form two-way relationships with your customers and employees, which is easier than ever in the digital age, will make your business life richer and more meaningful.”

(Profit From Your Processes)

by **Bob Hiebeler**, co-founder of St. Charles Consulting Group and leads services to clients in the areas of knowledge sharing solutions, process simplification and other enabling solutions to support client core business strategies. Bob was a senior partner with Arthur Andersen, with firm-wide leadership positions in knowledge management, common process implementation and best practices solutions. At Andersen, he led several world-wide implementation initiatives in knowledge sharing and best practices.

One of the major contributors to a company’s success is the visibility of its key business processes. In whatever work the successful company does, you will often find that its underlying work processes are masterfully designed – they are simple in design, straightforward in implementation, and easy to understand and to communicate. These are all attributes of a concept I call “Process Visibility,” and I have just completed a three-eBook series that details the numerous benefits of making your business processes visible in this way. (See [Process Visibility Series Now Complete](#))

The most recent eBook is called, *Profit from Your Processes*, and the short story is that, if an organization designs its processes with an eye to delivering high-quality customer experiences and to enhancing loyalty among its employees and other stakeholder groups, the results can lead directly to improved profitability and organizational sustainability.

Drawing on examples from the book, consider these three very different situations ...

Transit Complaints Plummet

A metropolitan transit authority was pressured by the mayor’s office to offer an extensive and expensive customer training program to its hundreds of bus drivers because of excessive complaints from the riding public. The consultant engaged to design the training, while assessing the underlying processes, found that little rigor was applied to hiring drivers with a strong customer-service orientation and also that drivers were not routinely treated with respect by dispatchers and others within the company.

Instead of a major training program, the consultant recommended: 1) that a behavioral interviewing component be introduced into the hiring process, and 2) that the bus maintenance process be significantly revamped. These changes resulted in drivers who

were well suited to the work and who took pride in their clean, well-maintained buses. Within a year after these changes were introduced, complaints to the Mayor's Office dropped by 75%.

Doctor's Office Draws Happy Faces

In the early phase of his practice, an internist in suburban Chicago found that process design acted like a wonder drug for his own patient-care delivery. He runs a practice that is so efficient that he needs only fifteen minutes with each patient to diagnose problems and to prescribe medicines, tests, or follow-up actions. And he is never late!

Key aspects of his current office process include: conducting the patient interview personally (strictly limiting his interview time to 15 minutes), judiciously involving a small team of medical technicians (as opposed to nurses), and using a well-defined protocol for dealing with the various problems and issues that patients present. During his tight interview time, the doctor's questions are smart and to the point, and he has a knack for zeroing in on the important priorities. The physician confided that his profit margin keeps pace with the industry despite the increasing government demands for greater efficiency. Greater efficiency appears to lower stress as well, because the office is characterized by cheerful people – both patients and care givers.

Consultants Organize Around Process

A large human capital consulting firm decided to apply Process Visibility to its own internal operations when it realized that its 100+ consultants – many of whom were brought in from other firms – were not collaborating well together, they were not following common methodologies for similar work, and they were not making effective use of the firm's support resources. The challenge was one of unifying a disparate group of seasoned professionals.

By involving a number of key consultants, drawn from the larger internal pool, the firm mapped its most important client service processes and used a consensus-building approach to develop firm standards. These individuals became invested in the process and served as champions for the revised policies and procedures that resulted. As the common language of process became more widely embraced, the firm was able to differentiate its global brand, to gain market share, and to create an integrated consultant workforce that is regarded by many as in industry best practice.

“Process-on-a-Page” Self-Assessment

One common denominator to these three examples – a large public organization, a doctor's office, and a professional services firm – is that they all evaluated the effectiveness of processes in terms of the impact on their customers and other key stakeholders, and this effort led to important process streamlining and significant impact on “bottom line” results.

Another common denominator is that these three organizations all had processes that were so elegantly defined that they could depict each key business process on a single page. Over time, I have found that the ability to zoom out to a high-level, single-page view of core processes is very powerful in communicating with one of the most important stakeholder groups – the company’s leadership. It provides leaders with information from a “bird’s eye view” and allows them to see the end-to-end process in its entirety. From that vantage point, they can then zoom in as needed to address more granular interests and concerns.

From this comes a self-test that you can take to determine whether your business process is sufficiently visible: *Can you depict your process on a single page?*

Unless and until you can depict the Phases and Activities of your process on a single page, I suggest that you have not yet achieved sufficient Process Visibility.

If you answered “no” to the self-test above, or if you would simply like to see what a Process-on-a-Page looks like, drop me a line: Bob Hiebeler, rhiebeler@stccg.com.

A “Value-able” Practice by John Blumberg is an Andersen Alumni and a full-time professional speaker and author who speaks with organizations who want to strengthen their core values and turn their people into better leaders. You can learn more about John at www.keynoteconcepts.com

Maybe there’s some truth to practice-makes-perfect. Or at least it makes it better. It certainly rings true when it comes to core values. Malcolm Gladwell, in his book *Outliers*, noted that we master a skill after 10,000 hours of practicing the skill.

Core values take practice.

Core values are not a skill. They are much deeper and richer than a skill. Skills are what we do. Core values are who we are. Our core values have the potential to transform our entire individual experience ... and our collective experience in an organization.

But it doesn’t happen just because we consider ourselves value-based. And it doesn’t happen just because we sit in a room and brainstorm a list (either individually for our own life ... or as the leadership team of an organization). It doesn’t happen because we put them in our day-planner, or in Outlook, or frame them on a wall.

It happens because we practice.

Core values only become realized through intentional practice. And it would appear that it takes a lot of practice! Some research would say we develop a new habit after 21 days of continually repeating the motions of the desired habit. If that were the case, then core values could actually be the “flavor-of-the-month” and it would have sticking power. In

fact, we would have an extra 9 days of additional assurance that the habit would be formed.

We could only wish it was so easy. Core values are not habits. But ultimately they do drive action. Once our values are clear we can begin to brainstorm what they look like in action in our current situation ... at work, at home and in our community. Our core values are not designed to change from one arena to another arena in our life. We only get one core ... and it goes with us everywhere we go. Each arena, however, gives us a chance to express our core values in a unique way. Once our core values come into focus, it becomes important for us to creatively think about what those values might look like in action. Once we can picture the action, then we have a template on which to begin to practice. It is unlikely that we will immediately get it right.

That is why it is called practice.

That is why actors and athletes and musicians all practice ... so they can get it right for when it really counts. In a conversation with Jerry Poras (coauthor with Jim Collins on *Built to Last*) I think he appropriately pointed out that we really know our core values when we come to a decision point in a crisis or very difficult situation ... and up to that point it is simply a theory. I immediately agreed but then added ... *I just think that moment is a horrible time to figure out what those core values are.* He agreed!

We practice day-in and day-out for that moment.

In the meantime, as we practice, core values begin to transform our day-to-day actions ... and the transformation of our day-to-day actions begins to transform who we are. In turn, thousands of amazing simple moments are created along the way. It is the collective nature of these individual moments that begin to transform the culture of an organization.

Each moment becomes the practice ... the practice for a major moment. The practice for that major crisis ... which ultimately, from a values perspective, becomes no crisis at all. It is just another moment. There is no difficult decision ... for our well-practiced values clarify the decision for us.

Practice is rarely glamorous. But it is necessary.

I am sure, however, that any actor, any athlete, or any musician will tell you there have been some magical moments they have experienced “in practice.” It is where relationships are built and break-throughs are realized.

It is this concept of “practice” that might well explain why most organizational core value initiatives never take-hold. Or why they become a passing flavor-of-the-month. It does no good to name something that you aren’t committed to persistently practice. This starts with the highest levels of leadership and permeates throughout the organization.

Practice may not make perfect ... but it sure goes a long way in creating a “value-able” experience. Core values do create value when they are practiced. This is a “no-cut” sport ... for those willing to practice. For those who are not ... they eliminate themselves from what is possible. Let your practice begin! If, at first, you drop the ball ... just pick it up. Have patience with yourself. It’s only the first hour. We have plenty of time ... in fact, another 9,999 hours to go before you will likely master it! And it is there where your persistence will make the difference.

Eyes Wide Open

By Jim Wanserski. Jim joined Arthur Andersen Business Consulting in Atlanta after 25 years in the telecom and high tech industries. Jim has specialized experience in the areas of interim management, turnaround projects and has served as a management trustee and consultant for the United States Department of Justice. He is a registered receiver for The United States Securities and Exchange Commission, Atlanta office and an active presenter and writer on fraud prevention/detection, operations and business ethics; he can be reached at (770) 612-8612, or via email at jhwanserski@wanserskiandassociates.com.

The local newspaper in Atlanta, GA executed one of the early investigative efforts into the historical, highly unlikely and overly-successful test score trends reported by the Atlanta Public Schools (“APS”). This past week, the long-awaited story finally broke publicizing the criminal indictment of 35 administrators and teachers. The “perp” walks were anticipated to occur in the AM on April Fools’ Day, most likely a fitting date indeed, for all concerned.

However, while holding fast to the “innocent until proven guilty” tenet of a free and “rule-of-law” society, the multitude of failings across a number of fronts is painful, even **without** knowing outcomes from to-be-decided settlements, jury trials, admissions, publicity, “told-you-so” pontificating, and etc. Taxpayers unknowingly funded sham results...including bonuses earned on inflated metrics...misbehaving was rewarded...and the real victims are the children now possessing substandard educations. For one, I have DIRECT and incontrovertible PROOF that irrespective of geography, wealth-level, parental involvement (or not), abundant funding (or not)—witness even parochial schools—the overwhelming majority of students will learn from:

GREAT TEACHERS who are trained and content-educated, but who most importantly...care;

- who exhibit enthusiasm and integrity;
- who set high expectations/standards; and,
- who demand, and correspondingly—when earned, give respect, in the classroom and throughout their activities in our schools.

From both [management](#) and [fraud detection](#) experience, “corruption follows money and power;” and not necessarily in that order! But leadership, oversight, countervailing forces, must be present, operative, and verifiable...in business, and in our educational institutions. Within all organizations, expectations have to be set and understood; results have to be measured, and operational processes, people, and systems must be up-to-the-task for results to be achieved...and understood along the way. Information must be “actionable,” especially if it confirms that “things aren’t going well” – and we now know that things weren’t going well with the longstanding record of “great” results in the APS...as much was fabricated, and we’ll likely know over the next year or so just exactly WHY, HOW, WHO...was responsible.

Shortly after the initial investigations, I attended a law firm-sponsored panel discussion featuring one of the local newspaper editorialists, a Georgia state legislative person, and a local university educational expert, led by a clearly blame-minded emcee. The upshot of the discussion that morning was...the pressure by the business community made the problems happen within the APS.

Interestingly enough, over a year later, I heard APS superintendent Errol Davis speak...his talk particularly resonated with me because he’s gathered more than his share of educational credentials, degrees, and honors...then he was a very successful businessman (CEO of Alliant Energy)...and then he joined the University of Georgia system—in his so-called “retirement” years. I occasionally use this quote in the 60+ management, [fraud prevention and detection presentations](#) I’ve made over the past 5 years:

Errol Davis: Atlanta Public Schools interim superintendent, 1st week in his new role; when hearing the story over and over, that the reason for the APS test scandal was “there was a lot of pressure to perform, and that’s what caused the cheating,” simply remarked, *“You know, I’ve had pressure my whole life (as have most of you here today), and my reaction to such a silly “reason” is...that’s a whole lot of bunk.”*

Actually, he used a different word, but you get my drift. His eyes didn’t fail him, nor did his common sense.

The Hunt for Talent: How Social and Analytics are Reinventing the Art of HR

by Jonathan Ferrer, VP Smarter Workforce IBM and reprinted with permission from IBM www.asmarterplanet.com

In a world where technology is driving significant change, from the latest smartphone to a computer system that can virtually think on its own, it’s imperative to remember one thing – that people remain the key differentiator in driving business value.

It's people, talent and their skills that are driving innovation, creativity and pushing the boundaries of business and the world as we know it. The ongoing challenge is identifying, attracting and empowering the key talent, people with the right skills, to drive [this value for your organization](#). How is your hunt for talent going?

Traditionally the challenge of identifying talent has been silo-ed to the Human Resource (HR) professional, but studies now show that executives at all levels, including the CEO, are focused on drawing out the best in their workforces, identifying the right people for the right job while making sure they are a good fit for their culture and goals.

For example, according to IBM's CEO Study, CEOs today are focused on three essential imperatives for their business, one of which is empowering employees. The report also reveals that 65 percent of global companies are having problems finding employees with the skills they need. Still, another recent report lists talent shortage as the #2 risk for businesses globally.*

The evidence is clear. The need for superior talent is increasing and organizations across the globe recognize that the best candidates are worth fighting for. The question is, how does an organization attract, retain and empower the right talent for the right position at the right time?

The answer is not as simple as revamping the HR department. It requires fundamentally shifting how you search for and develop talent. Take talent acquisition: gone are the days of static job postings and sifting through stacks of resumes. In an ever increasingly social and digital landscape where potential candidates are active over social networks, tagging their expertise and proactively making connections, a unique combination of social, analytic and talent management tools are required to attract and retain the talent needed to drive value for your organization and build a [Smarter Workforce](#).

Taking advantage of insights gleaned from behavioral studies and social networks, organizations have the opportunity to not only succeed in the hunt for talent but to drive the [21st Century workforce](#) – a workforce that is poised for driving economic value and growth for an organization. Now instead of collecting resumes from hundreds of applicants with one or two targeted skills, the business professional can become far more strategic in attracting and identifying talent with the exact skills that fit an open position. The result is an employee who is more engaged and connected, which drives productivity, creativity and unleashes innovation.

With the right talent, a business can achieve almost anything. Consider an organization like Regeneron Pharmaceuticals. The organization was tasked with hiring more than 350 pharmaceutical research and development professionals fast. But hiring so many highly trained scientists is no easy task. Great scientists are in high demand and tend to stick with the same company to see through completion of particular projects or trials. In order to meet its goal, Regeneron had to rethink its hiring and recruiting processes.

As it did, the company started taking advantage of analytics and cultural insights within Regeneron, itself, to determine common skill sets and traits that they could look for in an applicant. Someone who could help drive value. Identifying skills that included “passion to push the envelope” and “dedication to innovation,” Regeneron was able to target applicants who would thrive in the culture of the company. Matching the skills required with targeted applicants through robust talent management solutions, Regeneron was then able to realize their goal of hiring 350 scientists in a short period of time. It was so successful, the process has helped the company recruit more than 1,000 new employees in subsequent years. This led to significant business value as well, propelling 10 new drug candidates into clinical trials in record time. With the right people, Regeneron was experiencing exponential growth.

The successful hunt for talent is an ongoing issue. However, with the right combination of insights and tools, organizations can better understand how people work and recognize what makes them good at what they do. While technology will help enhance business, building a Smarter Workforce is imperative to an organization’s growth and competitiveness.

**Lloyd’s Risk Index 2011*

ENTREPRENURIAL SPIRIT – Carillon Financials Corporation

Leading ERP Developed by Former AA & Co. Auditor, Larry Pettit....

Larry a former Arthur Andersen & Co. Experienced Audit Manager in Dallas, Texas formed Carillon Financials Corporation over 23 years ago. Its flagship product, Carillon® ERP, was reviewed and listed by the Journal Of Accountancy as one of the top ten mid-level ERP packages.

Carillon® ERP now has installations throughout the USA, Canada, South Pacific, Hong Kong, Cayman Islands, and Bermuda. Carillon has been a Microsoft Certified Partner since 1992, the Carillon ERP product is listed in the IBM Global Solutions Directory, and Sybase has featured Carillon ERP in a customer success story.

Carillon ERP works with a variety of databases including Microsoft SQL Server, Oracle, Sybase and DB2. It is cloud capable and has been since before it was called “the cloud”. Fully integrated Document Imaging and CRM are built into the system. Microsoft Office applications can access the Carillon ERP data directly with no need to export and then import.

Some of you may have received training in St. Charles on Local Area Networking from Mr. Larry R. Pettit, CPA, CITP, CGMA in the early 1980s. He authored and taught the Firm’s Local Area Networking course which was taught in St. Charles multiple times.

During his tenure at AA & Co. (and later as a Senior IT Manager with KPMG Peat Marwick), Larry worked with almost every package available. He took what he liked from each of those packages and wrote a better one. He never knew that the networking and accounting system implementation experience he got at that time would launch his career building a premier ERP system that successfully competes with Microsoft Dynamics, Oracle, SAP and Sage.

“We may not yet have the name recognition of some of our competitors but if we get invited to the party we almost never lose”, said Larry. “If we don’t have the functionality that a client needs we’ll enhance the package so that we do have it. We build the functionality into the core product so upgrades are not a problem and any other client that might like that functionality will get it too. Since we’ve been doing that for several decades, the only functionality we don’t have is functionality that a client has never asked for.

Clients with support agreements have direct access to the developers and quality assurance staff. Carillon’s support is clearly the best in the industry.

Former Arthur Andersen & Co. employees can negotiate their best deal and then (right before signing the agreement) get an additional 10% savings off the license fee. Please don’t hesitate to call Larry direct at 800-739-9933 ext. 101 if you would like to talk to him about upgrading your ERP. (Just don’t tell him you’re ex AA & Co. until after you negotiate your deal and get your extra 10%!!!).

One Cup of Coffee at a Time *By Randy Hain, Managing Partner of Bell Oaks Executive Search, a fan and advocate of Andersen Alumni*

Having meetings at a favorite coffee hangout near my office almost every weekday for the last six years has led friends and colleagues to give me the nickname "mayor" as they liken my daily presence at the corner table by the fireplace to holding court. The friendly employees all know my name and walking in each morning makes me feel a little like Norm from the TV classic *Cheers*!

You might think my fondness for this restaurant is connected to my love of good coffee and the convenient location. Possibly, but my love of coffee meetings more accurately stems from the belief that this is a great way to build relationships and conduct business. I strongly prefer the relaxed feeling of a meeting over coffee to a lunch or dinner meeting with overly attentive waiters at your elbow interrupting the flow of conversation. I have never conducted business after hours over drinks; in my opinion, alcohol and serious business conversations don't mix well.

Coffee meetings can be the great "equalizer" and have a way of producing a relaxed atmosphere with a level playing field. Inviting people from your network and client prospects to join you for coffee, regardless of title, results in a more casual conversation

with an appropriate focus on getting to know each other. This is important, as I strive to be authentic and transparent with everyone I know. I find that a willingness to be candid about my life and interests first provides an open invitation for my guest to do the same. Pretty soon we recognize how much we may have in common and the ensuing conversation is more productive and enjoyable. We have established a relationship rather than conducted a transaction and the business relationship can later grow from this healthy foundation.

Other benefits of coffee meetings:

- Coffee meetings are easy to schedule and typically occur before the workday begins, freeing up more time to focus on work and other interests.
- They don't encroach on personal time as an after-work get-together would. I long ago committed to being home for dinner with my family each night, which seems to be a more common desire these days.
- In the current atmosphere of tight budgets and closely watched expenses, coffee meetings are one of the least expensive ways to conduct business.
- If you are struggling to pin down a client prospect or other important contact for a meeting, offer to meet them at a coffee shop near their office or at a convenient spot on their way to work one morning. This is often the least invasive way to get on their calendar and the least likely appointment for them to reschedule.
- There is certain predictability to having a favorite coffee spot where you know the food/beverage quality, the quality of the customer service and peak busy times to avoid.

I have told friends and colleagues for years that I am a blue-collar guy in a white-collar world. I certainly enjoy the food at great restaurants, but I often feel business meetings in these places can be contrived and pretentious. There is often a feeling of tension in the air with too much focus on being seen, impressing your guests and people-watching versus intentional listening and a sincere desire to learn about the people at your table. Building honest and collaborative relationships with my ever-expanding network is much more important than simply closing the deal. I would rather do business with my friends after we establish a trusting relationship, and the coffee meeting is simply my preferred vehicle for making this possible.

You may read this and be unconvinced about the benefits of coffee meetings. You should do whatever works best for you. My fondness for the subject of this post stems from years of growing self-awareness about who I am and how I prefer to interact with people. You may enjoy tremendous business success over lunch or cocktails and if it feels comfortable, keep at it. As for me, I will be at my favorite hangout five days a week building relationships -- one cup of coffee at a time.

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