



## Straight Thoughts, Straight Talk

*"Serving Andersen Alumni Worldwide"*

Oct. 2019

Vol.12 No.4

### Editorial

As I prepare to write this editorial, I am struck by the fact that we have seven alumni who are leading consultancies that were recognized as Best Firms to Work for by Consulting Magazine (see article in this issue). Seven out of twenty of the Best Firms to Work for Are led by Andersen Alumni. That is no coincidence.

I had the pleasure of working for one of those firms, North Highland, for 14 years. It was indeed a great place to work. While the CEO and I (COO/CFO) were Atlanta office alumni, we hired many more alumni from throughout the world. In fact, our most successful acquisition was an amazing consultancy led by another Andersen alumni in London. The common bond and shared approach to business was so engrained in all of us, I think it played a key role in the success of the two firms.

While I am no expert, I think the role St Charles played was instrumental in creating a worldwide culture of excellence and professionalism. The firm's commitment to train virtually every professional in the world at a common facility was unique and the ultimate differentiator. There are amazing consultants at all of the large consultancies, but those that did not have the St Charles experience are missing out. I wonder how many firms of any size emulate the centralized approach adopted by the early leaders at Andersen?

I know the challenges and the costs associated with such a model. We wrestled with the cost/benefit of that type of training ourselves, while at North Highland. Many said we are too small, and it is too expensive to bring everyone in to a single location in the US. They were not wrong. However, I owe a deep debt of gratitude to the visionaries at

Andersen who saw beyond the numbers and invested in a culture that was the pinnacle of professionalism and thrives decades after the firm's demise.

Seven out of twenty of the Best Firms to Work For are led by Andersen Alumni. That is no coincidence.

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

## Lucky No. Seven, Best and Brightest Continue to Shine

**By Warren Turner**, *Former Andersen Manager Enterprise Group, Partner at Cardinal Points and Managing Director Andersen Alumni Association*

Consulting Magazine recently released its [2019 Best Firms to Work For](#). It should be no great surprise that seven of the top twenty spots were held by Andersen Alumni. They are as follows:

- No. 2 [Collaborative Solutions, LLC](#), CEO Carroll Ross
- No. 3 [Systems Evolution, Inc.](#), CEO Bill Gallagher
- No. 5 [West Monroe Partners](#), CEO Kevin McCarty
- No. 6 [Pariveda Solutions](#), CEO Bruce Ballengee
- No. 12 [North Highland](#), CEO Dan Reardon
- No. 15 [Huron](#), CEO Jim Roth
- No. 16 [Protiviti](#), CEO Joseph Tarantino

Let's congratulate these Alumni and their firms in this achievement.

# Why Do I Work Here

By **Ed Maier**, *Former Andersen Partner*

Recently, Carol and I took a trip to Michigan. While there, we took a guided tour described by the tour company as “Mackinac Island and Michigan Lakes”. Over the years, we have taken several different scenic tours and cruises while on vacations. While I did not feel that this particular tour was all that scenic, I did find it to be very interesting. And it provoked my thinking enough to write about it. As most of these tours go, it was very nice, comfortable and informative. But beyond that, why did I decide to tell you about it?

Well, I have five reasons: The Music House Museum, The Grand Hotel on Mackinac Island, The Alden B. Dow Home and Studio, The Henry Ford and The Ford Rouge Factory. Each of these five reasons was also a stop along the tour.

The Music House Museum in Williamsburg displays rare antique musical instruments and music-making machines from the years between 1870 and 1930. Many of you have heard of, and perhaps visited, The Grand Hotel on Mackinac Island. This magnificent old structure, with its reputed “largest porch in the world”, was built in 1887. Alden B. Dow, son of the founder of the Dow Chemical Company and a student of Frank Lloyd Wright, was an architect who designed a unique, and (to some) magnificent, 20,000 square-foot home and studio located in Midland. The Henry Ford is a fascinating display of planes, trains and automobiles that illustrates the innovations that took place in these various industries from about the 1800’s to the 1950’s. The Ford Rouge Factory in Dearborn manufactures the Ford F-150 truck using the most sophisticated of today’s manufacturing, robotic and electronic techniques. Each of these in its own way told a story of creativity, inventiveness and a dogged entrepreneurial spirit.

But the real reason behind why I decided to mention these attractions is not what I viewed while visiting them; nor was it what I learned during each tour about their history and the creative spirit that gave birth to them. What fascinated me more were the people I met in these places who wanted to tell me about them. Each individual was passionate about their organization’s history and the romance and intrigue contained therein. Whether they were volunteer docents in one of the museums, or regular employees in one of the other locations, the excitement in their eyes and enthusiasm in their voices was apparent as they relayed the history of each of these sites. It was a pleasure to see and hear. Some may say it was their job to be this way--that their job description required them to be so enthusiastic. But I challenge you to consider this. Could each of us lead a group of potentially uninterested tourists around our respective workplaces and paint an enthusiastic picture of its history? Could we inform them about the challenges the founders faced as they began the struggle of building their organization? Could we describe the value it has added to our community or society? Could we do it with passion, excitement and enthusiasm?

There is no question that each of the people I met guiding us through these places is being compensated for what they do—for painting a vivid picture of the history of their workplace and of those who built it. But each of them also works in that workplace. I am sure that they come in every day and face their daily routines just like we do when we show up at work. When they are not in front of a tour group they have to enter daily transactions, make sure the place looks clean and orderly and complete all of the other mundane tasks that go with a regular job. But when the time comes to stand in front of a group of complete strangers and entertain them, they do so with a level of enthusiasm that is pretty impressive. So, I am simply asking you to consider—could you do the same?

I would not expect each of you to be able to “perform” in a “tour guide” fashion in your respective jobs. But each business or organization in which we work has a history and a culture. I hope you understand it, can explain it and are proud of it. I hope you know something about the founders who believed it was a good idea on which to build success. I hope that each of you has a strong enough belief in the place that you work, and pride in the work that you do, that you could be an enthusiastic “tour guide” through the business.

If we don’t understand the history of our place of employment, if we can’t talk about what our organization or company does in a manner that would “entertain” a tour bus of strangers, then why do we bother showing up to the office or the plant or the distribution center every day? If we work 40-50 hours a week (and I am sure many of you do much more than that) and give that much of our time to our “jobs”, why shouldn’t we feel good enough about our work environment that we would want to share its history with others and explain how it contributes to the economy or society?

We don’t have to invent the assembly line as did Henry Ford. We don’t have to design a home as did Alden Dow. We don’t have to start a museum from our collection of antique musical instruments as did David Stiffler and Dean Junker. But we can understand the purpose that the founders of our company had in starting the business; we can be proud of our role in continuing it and we ought to be able to explain that to others in a manner that piques their interest. Otherwise, why are we involved?

As always, I am interested in any thoughts you have about what I write. Feel free to write me at [ed@thinkstraighttalkstraight.com](mailto:ed@thinkstraighttalkstraight.com) and let me know.

And, if you enjoy what I write, please go to [Amazon](https://www.amazon.com) and purchase your copy of ***Think Straight. Talk Straight.*** And encourage your friends, relatives and colleagues to do the same! And thanks to all of you who have already purchased a copy!

# FIVE THINGS YOU MUST DO RIGHT TO BENEFIT FROM EMERGING TECHNOLOGIES

By Erik Brown and Tyson Hartman, *Both Andersen Alumni*

Andersen heritage runs deep within West Monroe Partners. Co-founder, President and CEO, Kevin McCarty, is an Andersen alumnus. Many of West Monroe's senior leaders also have roots in the Andersen family and continue to apply their uncommon blend of business consulting savvy and deep technology expertise to help clients tackle issues, transform, and thrive.

One big challenge for businesses of all types is how to accelerate use of new digital technologies and other emerging tools, such as artificial intelligence. In this article, Arthur Andersen alumnus Erik Brown and Andersen Consulting alumnus Tyson Hartman explain that before companies can take full advantage of such technology, they must first change their approach to enterprise architecture by focusing on five key areas.

[Full article](#)

## **Article**

### **FIVE THINGS YOU MUST DO RIGHT TO HELP YOUR ORGANIZATION BENEFIT FROM EMERGING TECHNOLOGIES**

*[Erik Brown](#) is a senior director in West Monroe's Technology practice in Chicago. He began his career with Arthur Andersen in 1999. [Tyson Hartman](#) is a senior director and member of West Monroe's Strategic Growth team in Seattle. He began his career with Andersen Consulting in 1993.*

Many business executives are eager to establish artificial intelligence and other emerging technologies to help their organizations to improve business agility, speed, and innovation. Their demands, however, are straining technology organizations tasked with trying to implement new tools within existing enterprise architecture. The problem is, today's technology organizations simply aren't built in a way that allows them to move quickly.

Before companies can take advantage of emerging technology, they must change their approach to enterprise architecture. This requires more than technology changes. It requires transformation of the enterprise architecture skills, organizational structure, culture, and expectations – and, indeed, the very role and stature of enterprise architects in the business.

While most organizations understand that the process of building software has become more agile, they still look at architecture as a static planning exercise – with complex

diagrams of how technologies fit together to run aspects of the business – that changes very little from year to year.

Modern architecture, on the other hand, is fluid and flexible, capable of adapting incrementally in weeks or months rather than several years. Development occurs in repetitive cycles rather than as a defined “process.” Business vision and value creation are the impetus for all technical decisions, and the modern enterprise architect is an active participant in those discussions with the business. For example, the enterprise architect who is involved in discussions with the business about entering a new market to test a potential revenue stream can then design ways to perform the test incrementally. Modern architecture allows this addition to the system without impacting established areas of the business.

The challenge is figuring out how to shift the organization from traditional enterprise architecture to modern enterprise architecture without disrupting current business. From our experience working with organizations to implement emerging technologies, we have found it beneficial to focus on these five areas to establish:

1. The right level of “voice” and leadership for enterprise architecture within the organization
2. The right organizational structure that aligns teams with product or business owners rather than technology disciplines
3. The right talent with business acumen and skills for working in environments that require creativity, change, and autonomy
4. The right culture, where it is okay to experiment and to approach development without the “perfect” design in mind
5. The right roadmap that orchestrates the shift to modern architecture in incremental steps and delivers value in months rather than years

Like the technology architecture itself, the transformation process does not have to be fully defined and vetted in order to make meaningful progress. We can help think through strategies for maximizing the value of existing infrastructure investments while improving your ability to use emerging technology to respond to change.

To learn more, download the full report, “Modern Enterprise Architecture: Five Things You Must Do Right to Help Your Organization Benefit from Emerging Technologies,” [here](#).

# New Medicare Medical Savings Accounts (MSA) Growing in Availability and Popularity

By **Greg O'Brien**, *CEO of Medicare Caddy, LLC, a friend of Andersen Alumni*

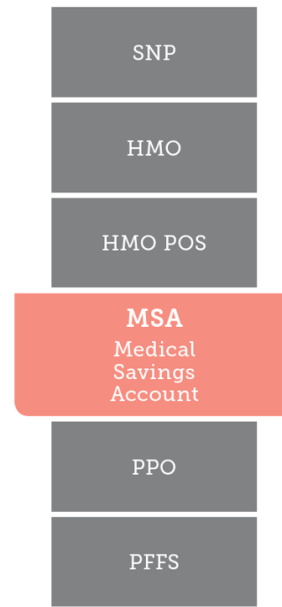
Medicare insurance is confusing, complex and constantly changing. As of September 2019, there were almost 21 million Medicare Advantage enrollees, about one in three of the 62 million Medicare beneficiaries. However, according to CMS enrollment data, less than 7,000 have a Medicare Medical Savings Account plan. But that number is about to change in a big way.

Thanks to an insurance company named **Lasso Healthcare**, millions of American seniors across 26 states will now be able to evaluate and choose this very different approach to managing healthcare expenses.

## What is an MSA?

- **Highly Regulated Plan Created by Center for Medicare & Medicare Services (CMS)**
- **Financial Investment Tool with Medicare Advantage health plan**
- **Consumer-Directed Medicare Benefits**
- **Perfect for Using Accumulated HSA Balances**

## MSA: One Type of Medicare Advantage Plan



An MSA is similar to the popular health savings account (HSA). However, instead of your client contributing tax-free to their account, a lump sum is deposited annually into a medical spending account by the plan via Medicare. For Lasso MSA enrollees, the amount deposited in 2020 will be \$3,240. Members have the flexibility to spend their balance on qualified health expenses (hospital and medical costs, dental, vision, and long-term care to name a few), or *save it for future costs*.

In addition to the savings account, Lasso MSA members are enrolled in a high-deductible health plan, which means nothing is covered until that deductible is met. But statistics show that the vast majority of Medicare beneficiaries will have significant MSA deposit money left over at the end of the year. ***So, the real value of an MSA is that any money not used from that annual deposit will roll over year after year.*** And it grows tax-free and withdrawals are also tax-free when used for qualified medical expenses.

While MSA plans can't cover prescription drug costs, MSA enrollees are able to shop and choose the one best suited for their needs from the dozens of stand-alone Part D prescription drug plans.

### Who Should be Most Attracted to Medicare MSA plans?

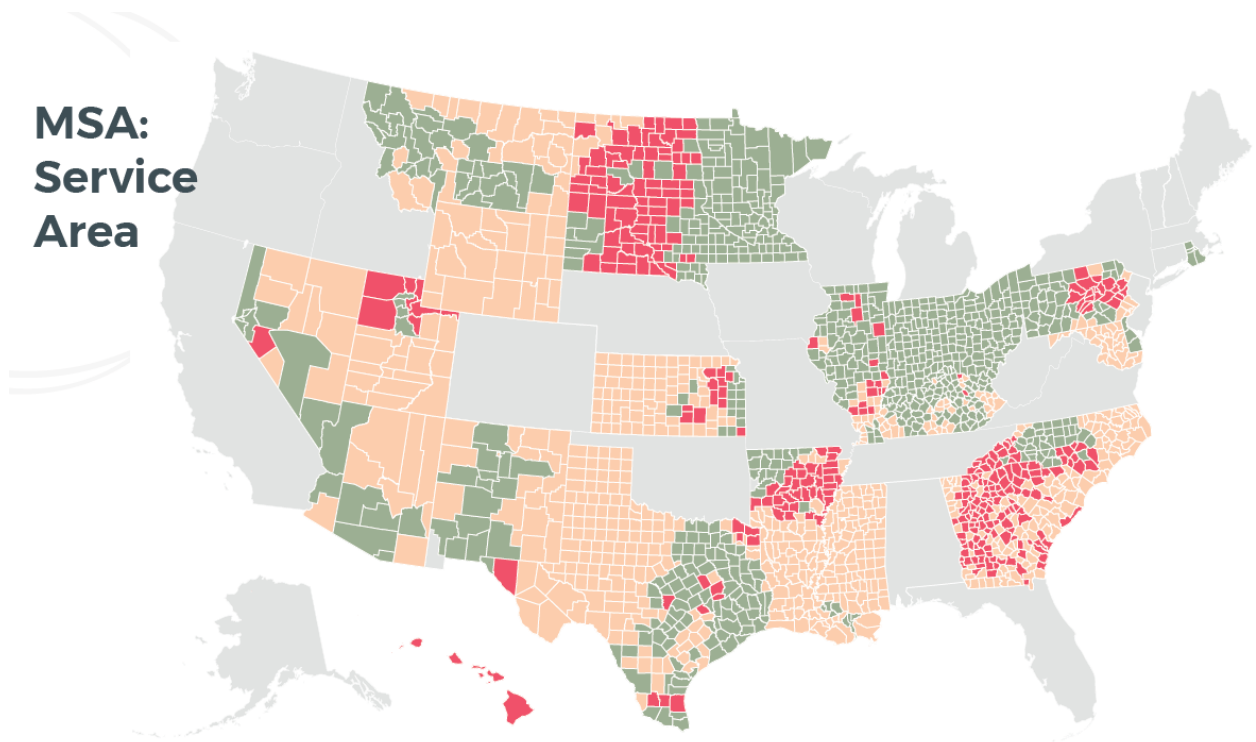
Millions of healthy and health-conscious seniors who are aware that the need to save for future healthcare costs is greater than to be overprotected for the near term. The Center for Medicare & Medicaid Services wants people to be more accountable and responsible

in what they spend on healthcare – and to entice them with upfront monies that can be saved and invested tax free to pay for the inevitable future medical expenses.

### **Health Savings Accounts (HSAs) a Bellwether for Growth of Medicare MSA Plans**

At the end of 2018, approximately 25 million non-Medicare Americans had Health Savings Accounts (HSA) along with a high-deductible health plan. According to many financial advisors, the “triple tax-advantaged” funds in the HSAs compete favorably with IRAs and 401k plans as retirement investment vehicles. But once enrolled in any part of Medicare, the ability to contribute additional funds to an HSA ends.

The rapid acceptance of employer sponsored HSA plans bodes very well for the growth of Medicare Medical Savings Accounts (MSA). In 2018, MSA plans were only available in portions of two states (New York & Wisconsin). The Lasso Healthcare MSA launched in 17 additional states in 2019 and, for 2020, Lasso is expanding the MSA offering to millions of Medicare beneficiaries living in 26 states and Washington DC.

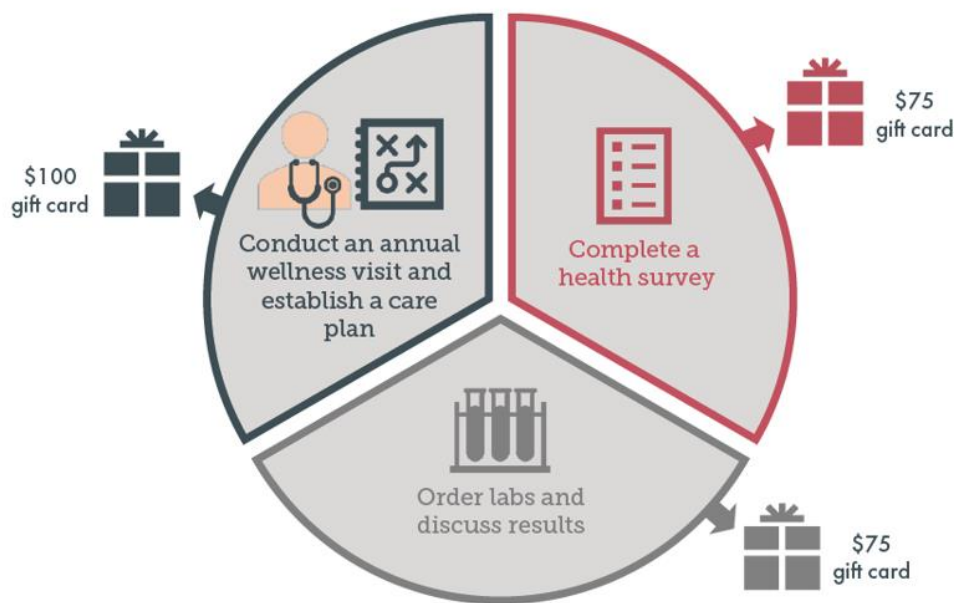


## Other Attractive Reasons to Like Medicare MSA plans

- **\$0 Monthly Premium**
- **No Provider Networks to Deal With**
- **Pay Only the Medicare Approved Amounts for Services**

By law, MSA plans cannot charge a monthly premium and they cannot limit Members to using a network of doctors, hospitals or other healthcare providers. This combination of \$0 premium and the ability to see any Medicare provider in any location seems to take the most attractive elements of many Medicare Advantage plans as well as the “freedom of choice” offered by Medigap plans. And the cost for Medicare Parts A & B services is always at the lower of the actual cost or the Medicare approved amount.

Additionally, to support the wise use of preventative care services, the Lasso MSA plan offers an additional \$250 in gift cards for completing (optional) an annual wellness visit, a health survey and screening lab tests.



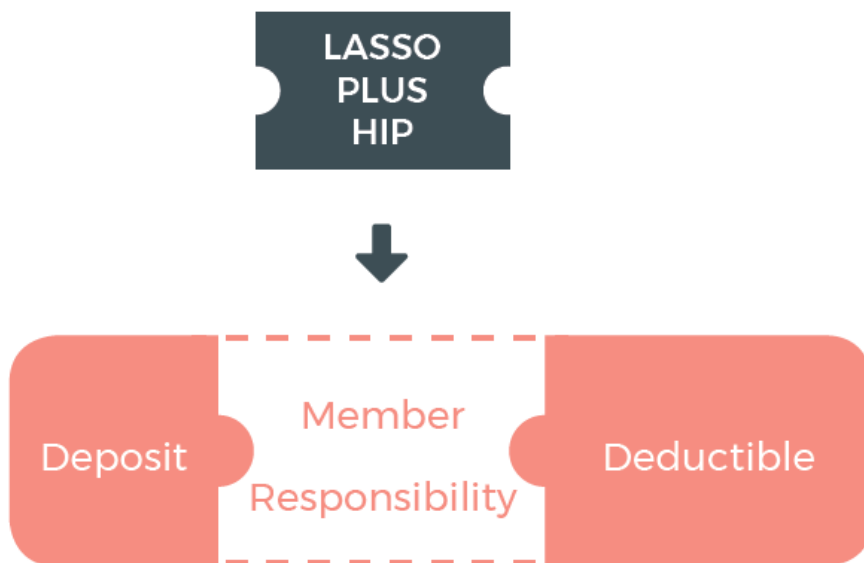
## The High Deductible Concern About MSA Plans

- **What If There is an Accident or Serious Illness?**
- **How Much is the Deductible?**
- **Can I Insure Against Paying the Deductible?**

While it takes a serious accident or illness to meet the deductible, the annual deposit already accounts for a chunk out of that threshold. The funds saved in the MSA should be used to pay for costs related to Medicare Parts A and B but can be used tax-free for hundreds of Qualified Medical Expenses (QME). The deductible amount varies by region but will be either \$7,400; \$8,400; or \$9,400 during 2020.

Once the deductible is met, all Medicare hospital and medical expenses are 100% covered until the following calendar year, when the deductible is reset, and a new deposit is received.

The difference between the Deductible and the Deposit is referred to as the Member Responsibility. For Region 1 enrollees in the Lasso MSA, the Member Responsibility would be \$7,400 less \$3,240 = \$4,160. While it may take two or three years of unused deposits to save an amount equal to the Member Responsibility, Lasso Healthcare also offers a companion hospital indemnity plan (HIP) should an adverse health event happen in the first few years before the MSA balance is sufficient to cover the Member Responsibility.



### **Closing Thoughts About Medicare**

Many experts predict that the rising costs of healthcare for the enormous Baby Boom generation with greater longevity will cripple the U.S. federal budget that pays for Medicare, Social Security and Medicaid. The only proven way to slow this down is to incentivize Americans to save more money to pay for future healthcare costs. By having to spend their own money, people will be much more prudent in how they spend it.

Medicare Medical Savings Account (MSA) plans are a major step in that direction.

Ask your Medicare insurance agent and/or financial advisor for their thoughts about Medicare MSA plans.

Reference Andersen Alumni for a FREE Telephone Review of Your Medicare Options, including the Lasso MSA plans, call 404.821.1886



Greg O'Brien is Managing Principal of Medicare Caddy, LLC. Based in Atlanta, GA, Medicare Caddy is a licensed insurance agency specializing in all forms of Medicare related insurance. Medicare Caddy has helped hundreds of people evaluate Medicare options and enroll in the plans that optimize their Medicare benefits.

Greg can be reached by email at [greg.obrien@medicarecaddy.com](mailto:greg.obrien@medicarecaddy.com), phone 404.821.1886 or visit <https://www.medicarecaddy.com/andersen-alumni-association>

# New Book Release Authored by Andersen Alumnus Tamara Chandler: Feedback (and Other Dirty Words): Why We Fear It, How to Fix It

By M. Tamra Chandler, Andersen Alumnus, is the founder and CEO of PeopleFirm LLC, one of Forbes Magazine's 2018 "America's Best Management Consulting Firms" and the author of *How Performance Management is Killing Performance – and What to Do About It*.

It's time we redeem feedback. Why? Because feedback has a branding problem — a negative reputation that has been built one lousy experience at a time. Not only have we got feedback wrong, as humans we're paying a significant price for our feedback missteps and misuse.

When we take a step back and think about feedback's true intent, we realize that it shouldn't be a bad thing. If we want to improve, grow, and advance, we need insights that help us do that. When we get it right, feedback lifts us up, helps us understand our strengths, shows us pathways to achieve that next step, and sometimes even changes the course of our lives.

The roots of feedback's branding problem lie in the way we think about it and experience it. Our misconceptions, bad habits, and defense mechanisms have led us astray. To redeem feedback, we need to examine how we got here and equipped with that understanding make a fresh start on fixing feedback once and for all. Our fix requires a fundamental change, a seismic philosophical shift in our thinking about feedback. To redeem feedback, we need *a movement!* A movement that starts with you and me.

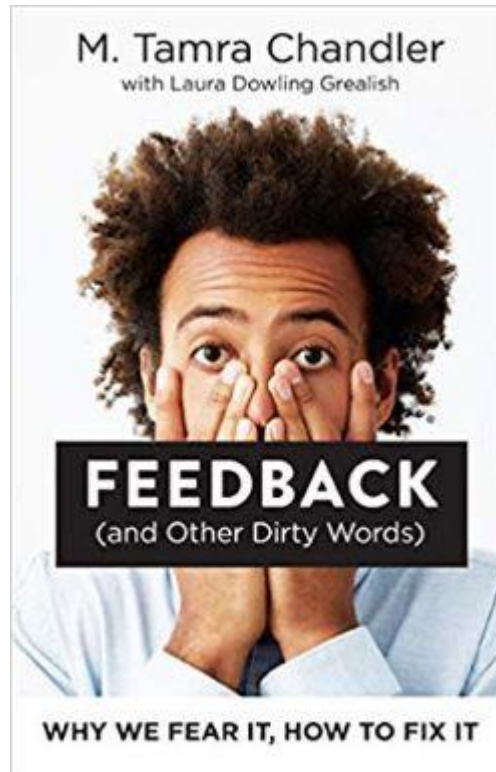
To get our movement off the ground, we need to take these actions:

- 1) Embrace a new definition of feedback
- 2) Anchor our methods in the bedrock ideas of *trust*, *connection*, and the three F's of *fairness*, *focus* and *frequency*
- 3) Build an army of Seekers, empowered to ask for insights

Here's our new definition:

**FEEDBACK** /'fēd,bak/ (noun)

CLEAR AND SPECIFIC INFORMATION THAT'S  
SOUGHT OR EXTENDED WITH THE SOLE INTENTION  
OF HELPING INDIVIDUALS OR GROUPS IMPROVE,  
GROW, OR ADVANCE



Take particular notice of the concept that feedback should have “the sole intention of helping.” If feedback isn’t intended to help individuals or teams thrive and grow, they why offer it or seek it? Equally important is tuning into what’s not in our definition: namely that, in our better feedback future, feedback is not intended for evaluation, blame, or judgment. Helpful feedback inspires us to look forward to a better version of ourselves, our organization, or our team.

To develop individuals and build teams that thrive, grow, and operate at optimum levels of performance, we must start with *trust*. Trust is built over time through human *connections* that are kind and supportive and that send a strong message that we’re in this together. Trust isn’t built in a day; there is no shortcut. It’s the product of an ongoing process that is influenced by how we show up in every conversation, decision, and action. If we begin by building trusted connections with those valuable people who see us at our best (and worst) every day, we’ll have a solid foundation for our movement.

We’re launching our movement under the banner of **Fairness, Focus, and Frequency**. And as we march forward together, we plan to fly these three F’s high and proud:

**Fairness** – For feedback to work, there must be trust. If a relationship or any given exchange is tainted with a perceived lack of fairness, feedback won’t work, and trust is broken. While most of us have the best intentions to be fair, our human tendency toward bias gets in our way. To operate with fairness, we need to engage without judgment.

**Focus** – Focus is a big idea delivered in small bites. In our daily lives we already have too much information to process. For feedback to help, we need to keep it focused. If you're looking for some feedback, make it a focused ask for perspectives on just one thing. If you feel compelled to tell someone they rocked it, tell them the one thing you noticed that set the bar. If there was one thing that someone could do to have a far greater impact, then share what you noticed.

**Frequency** – The more often we connect, the greater the trust we build. For this reason, frequency is a critical foundation for strong, helpful feedback. Frequency accelerates feedback; while fairness and focus fuel the engine. Frequency improves the quality of our relationships and accelerates our learning; it tells others, "I'm paying attention, and what you do is important and notable."

When you embrace these three Fs, feedback is light and easy. When feedback is fair, focused, and frequent, trust thrives, learning happens, and everyone involved is freed to take more risks and seek greater growth.

Why do Seekers play the most important role in fixing feedback? The reasons are many. Here are just a few:

- Seeking is the ultimate trust generator. It demonstrates humility, and that you value the input of others.
- Seeking helps us build connections with others and nurtures our trusted relationships.
- When you seek feedback, you're more likely to act on it.
- When you're seeking, you're in control. You can request the insights you need to grow and advance according to *your* plan, not someone else's.

Ready to join the movement? Imagine creating cultures in which feedback flourishes. Imagine a world where we feel safe being authentic and transparent about who we are, and just as open about the work we still need to do to be who we want to be. A world where we let go of the fear and embrace the help others offer us.

# Your Path to Successful Event Marketing

By **Kim Schlossberg**, *Andersen Alumnus Marketing Manager 1992-2002 and owner of [Kim Schlossberg Designs](#)*

Based on events I have planned and managed over the years, I created an easy to follow checklist to ensure event success. Initially created with a non-profit event in mind these 55 steps would only need minor tweaks for use in planning business events. I hope this may help with your future events - and that you're able to enjoy the party you worked so hard to plan!

strategy	Goals
	<input type="checkbox"/> Why do the event? (Is there a better or easier way to raise funds?)
	<input type="checkbox"/> Message or theme
	<input type="checkbox"/> # of attendees
	<input type="checkbox"/> \$\$ raised
	Resources
	<input type="checkbox"/> People (staff, board members, volunteers, committee, hosts)
	<input type="checkbox"/> Cash to invest
	<input type="checkbox"/> Other (venue, art, entertainment, etc.)
	<input type="checkbox"/> Committed sponsors

details	<input type="checkbox"/> Type of event
	<input type="checkbox"/> Event title & theme
	<input type="checkbox"/> When (check public event calendars for holidays or other conflicts)
	<input type="checkbox"/> Where (reserve venue)
	<input type="checkbox"/> Entertainment
	<input type="checkbox"/> Food & drinks
	<input type="checkbox"/> Decorations
	<input type="checkbox"/> Auction (Live or silent? Start gathering donations)

b	<input type="checkbox"/> Should relate organization's brand
	<input type="checkbox"/> Event name

	<input type="checkbox"/> Logo
	<input type="checkbox"/> Color palette
	<input type="checkbox"/> Style
	<input type="checkbox"/> Images

sponsors	<input type="checkbox"/> Levels & benefits
	<input type="checkbox"/> Sponsorship package (letter, forms)
	<input type="checkbox"/> Website
	<input type="checkbox"/> Thank you card
	<input type="checkbox"/> Make sure sponsors get promised benefits
	<input type="checkbox"/> Sponsor event or party
	<input type="checkbox"/> Recognition (website, social media, press, invitations, etc.)
	<input type="checkbox"/> Reserved tables, etc.
invitations	<input type="checkbox"/> Save the date (printed/emailed)
	<input type="checkbox"/> Invitation packages (invitation, reply card, envelopes)
	<input type="checkbox"/> Email invite with reply/registration link
	<input type="checkbox"/> System to track registrations and updates to database
	<input type="checkbox"/> Social media
	<input type="checkbox"/> VIP Invitations from board members, committee

promotion	<input type="checkbox"/> Promotion schedule (mail, email, social media, press releases, broadcast, etc.)
	<input type="checkbox"/> Event web page or website
	<input type="checkbox"/> Event social media page
	<input type="checkbox"/> Event email template for invitations and updates, thanking sponsors, sharing news about the goals and theme
	<input type="checkbox"/> Posts for organization pages & social media (make them sharable)

	<input type="checkbox"/> Capture news for social media posts + PR (sponsors, donations, activities, etc.)
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showtime!	<input type="checkbox"/> Program
	<input type="checkbox"/> Menu
	<input type="checkbox"/> Auction catalog
	<input type="checkbox"/> Door prizes or goody bags
	<input type="checkbox"/> Signs & banners
	<input type="checkbox"/> Presentation or film
	<input type="checkbox"/> Photographer

follow-up	<input type="checkbox"/> Capture attendees, sponsors, donors in database
	<input type="checkbox"/> Thank you letters
	<input type="checkbox"/> Share photos, stories with attendees, sponsors, social media, and PR
	<input type="checkbox"/> Make any follow-up calls, meetings
	<input type="checkbox"/> Capture lessons learned so next year's event will be even better!

# Right Here, Right Now

By John Blumberg, Andersen Alumnus and author of *Return On Integrity*  
([www.BlumbergROI.com](http://www.BlumbergROI.com))

I still remember the night I first heard Pete play the piano. What was most memorable, that night, was how much he sounded like my favorite group, [Chicago](#), whenever he played any of their music. The following week, I would find out the reason – he was the pianist in the origins of the group, [Chicago Transit Authority \(CTA\)](#). In the years to follow, Pete would become a most gracious mentor for me in my career at Arthur Andersen.



One of my all-time favorites of the CTA, was *Does Anybody Really Know What Time It Is?* In writing this article and reminiscing about this song, I stumbled upon [this](#) most heart-felt and energized rendition of a [cover band playing](#) it a half-century later in Kiev, Ukraine. It was a song about time that has stood the test of time ... and was possibly even prophetic a half-century before its time. In so many ways, time is an illusion. Yet, time recently played its hand again in a planning call with my friend Andy.

Andy does a lot of meaningful and substantive work helping people connect to their true purpose. Recently, we were deep into a conversation on the nuances between one's purpose and one's integrity. While we knew they were different, it was fun to explore the systemic relationship between them.

As we gave each other a lot of grace in brainstorming possible insights that connected the two, an idea surfaced around one of the great treasures of one knowing their true purpose: an inspiring aspiration and guide from here to there – now to then. As Andy expanded on it, I felt a sense of sequence and a passage of time. I had an image in my mind that “purpose” takes you places. It creates. It expands. My soul felt motion and momentum.

As I was feeling the building energy of purpose, I slammed into a stand-still realization about integrity. It has no motion, no ground coverage, no then or there. It only has connection.

### **In just one place. This present moment.**

As a state of being, integrity is not an object that you have or hold. Integrity is a state of integrated connection that exists moment-to-moment in our ever-changing contextual landscape. You might think of your experience of integrity more like tuning a radio dial on a long two-lane road trip rather than mindlessly expecting seamless cell tower connection speeding down an 8-lane freeway.

It’s not that we have integrity, or we don’t. There are no haves and have-nots. There are simply those who are tuned-in or tuned-out. Well-defined core values are like your stations. The signal is always picked-up right where you are — in this present moment. Ten miles up the road or 10-miles back are irrelevant to being tuned-in right here, right now. Integrity’s value is found right where you are. Every moment. Every day.

### **So, maybe it really doesn’t matter what time it is.**

Until my planning call with Andy, I’m not sure I had ever noticed that integrity stands so still in a world that moves so fast. As a state of being, it is simply how integrity works – keeping you right where you belong.

In the days following our call, I pulled together this [40-second clip](#) for social media posts. I hope it will inspire you and remind you, that when it comes to integrity, the only time we really need to care about is right where we are. [CLICK HERE](#) and enjoy.

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>

# Download Valuable Information from LinkedIn for Free

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”)*

Have you downloaded a list of your LinkedIn connections lately? Did you even know it's possible to download it?

This extremely useful function has been available for quite some time, but most people have not taken advantage of it.

But the good news is LinkedIn has expanded this feature, and now—in addition to a list of your connections—you can download lots of other valuable data from your LinkedIn account.

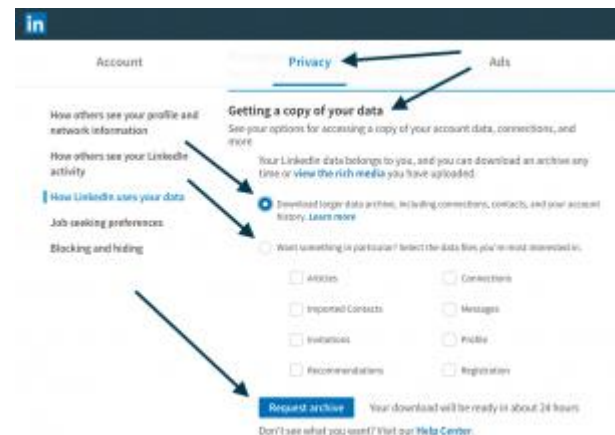
Now, if you're saying to yourself, *It's probably hard to figure out how to do it—and even tougher to know how to capitalize on the information*, I've got good news for you: It's very easy to do.



## Here's how to get your data download

Just follow these four simple steps:

- On your LinkedIn home page, click *Me* in the top toolbar.
- Choose *Settings & Privacy* from the drop-down menu, which takes you to the *Privacy* section of this page.
- Scroll down and click *Getting a copy of your data*, and choose either a full download or specific data files.
- When you receive the email from LinkedIn, follow the instructions to download your data files.



That's it. Within ten minutes, you'll get the specific file you requested, and you'll receive the full download within a day. It will be sent to the primary email listed in your LinkedIn account.

## **Here's what you'll get**

You will obviously find some of this information to be more useful than others, but I can assure you there are some real gems in here. Here is a partial list of what you'll receive. Click [here](#) to see the full list.

### **Account information:**

- Registration information
- Login history, including IP records
- Email address history and status
- Account history, including account closures and reopens

### **Other information:**

- Name, including the current name on your account and any previous name changes
- A list of your first-degree connections
- Photos that have been uploaded to your account
- Endorsements you've received
- A list of the skills on your profile
- Recommendations given and received
- Connection invitations sent and received
- Inbox communications
- Group contributions
- Your search history
- Content you've posted, shared, liked, or commented on
- Mobile apps you've installed
- Ads you've clicked on
- The targeting criteria LinkedIn uses to show you ads

In my opinion, the most useful information is the list of your first-degree connections. In that spreadsheet you'll find first name, last name, current job title, current company, and connection date.

Note: Prior to the fall of 2018, you would also receive the email addresses of your connections, but that is no longer included in this spreadsheet unless your connection opted into sharing that as part of the download—and there's not much chance of that. You can still get your connections' email addresses from the *Contact info* section on their individual profiles, unless they've chosen to not display it, which is typically not the case.

## Here's what you can do with the data

What you can do with this data is only limited by the extent of your imagination, but here are a few of the suggestions I give my [LinkedIn consulting clients](#) about using the data to grow their businesses and find their next jobs.

### A list of your first-degree connections

If you're currently employed as a business development professional or you own a business, it might be beneficial to pare down this list to the people you want to specifically prospect. Then look up their email addresses, drop them into the spreadsheet, and import that spreadsheet to your CRM or email system for future nurturing and/or followup. However, be sure you receive the appropriate permission prior to adding them to any mass email list.

If you're a job seeker, especially if you're a sales or business development professional, you could pare down this list to people who might be of interest to your prospective employers. If you walk into your job interview with this impressive list of prospects who are already in your first-level LinkedIn network, you'll no doubt make a terrific first impression.

### Your LinkedIn recommendations

If you're currently employed as a business development professional or you own a business, look through the list of your recommendations, and choose a couple of the very best quotes. When you send out proposals, include those quotes to show how thrilled your past clients were with you and your products and services. KaChing!

If you're a job seeker, grab some great quotes and place them in the relevant Job Experience entries on your profile. Positive comments about your skills and abilities go a long way with prospective employers.

Don't delay—go get your data now. And why not do yourself a favor and make a note to follow this procedure at least quarterly. You never know when you'll need this goldmine of information.

## Special Offer

If you'd like me to provide a detailed critique of your profile and help you develop a winning LinkedIn strategy, be sure to take advantage of my special offer: **A one-hour, one-on-one consultation for just \$197.**

This consultation will take place on the phone, and I will share my computer screen with you. There are limited spots available, so don't delay. Book yours today by clicking [here](#).

# Why choose Comhar Partners for your next Retained Search?

**By J. James O'Malley**, *J. James O'Malley, Managing Director at Comhar Partners, has been developing HR and talent acquisition solutions for global consulting firms (including Huron Consulting Group, Arthur Andersen, Deloitte and Lante) since the mid-90s. Jim has seen firsthand why Hiring Managers are frustrated by and don't "get" recruiting. Based on his experience, he addresses the differences between large and boutique recruitment firms below. It's his intent to dispel myths that Hiring Managers hold about recruiting while, at the same time, ensuring that recruiters who work for firms are free to do their jobs, which is hiring the "best and the brightest".*

Several years ago, marketing guru Seth Godin wrote and spoke extensively about why "small" is the new "big". He listed a whole host of reasons on why smaller businesses often outsmart and outsell bigger ones including:

- Small means the founder makes a far greater percentage of the customer interactions.
- Small means the founder is close to the decisions that matter and can make them, quickly.
- Small means you can tell the truth on your blog.
- A small firm is succeeding because they're good, not because they're big. So smart small companies are happy to hire them.

Let's apply Godin's logic to executive search. The industry is characterized by two types of companies. On one extreme are a handful of mega-firms, some of them publicly-held, with big brand names and revenues in excess of \$500M per year. These large firms typically cater to Fortune 100 clientele and have deep relationships with their boards. It sounds prestigious to say, "we're using a big-name firm", but, unless you're a Fortune 100 company, your search can get very expensive, lost in the shuffle, and they will ultimately recruit from you after their hands-off time has expired.

On the flipside, there are a multitude of boutiques, most of which specialize by industry and/or function. We believe strongly that most companies get better results by partnering with the right boutique. By answering the following questions, we're pretty sure you'll come to that same conclusion:

Are you really dealing with the recruiter who will do your search?

When you engage a boutique, you are dealing directly with the person who will work on your project. In contrast, at big search firms, the search may be directed by a "Partner" but, in fact, a significant portion of the work is done by less tenured associates. These may be people you have never met. Or people with minimal knowledge of your company or your business challenges and goals. As a result, the candidates may possess the functional match to job description but may not have the cultural competence and traits

(or what we call “the spirit”) of the job description. This can result in bad hires who don’t fit your corporate culture and perform poorly down the road.

Will you have access to more candidates?

Executive search firms have an ethical (and usually contractual) obligation not to recruit from clients. Big search firms have significant off-limits constraints, which limits the pool of candidates. As these firms get bigger, this problem also gets bigger. While the big firms are becoming cleverer by defining off limits around a project or client - and not the company they represent - boutiques can access more candidates because they have fewer off-limits companies. In addition, a little-known fact is that candidates that are active on a search within a firm are also off-limits for any other search projects. Large firms can have literally thousands of active candidates throughout the firm at any one time...many of whom are unavailable for your search!

How many searches is the firm or consultant working on?

A typical search firm partner may conduct 15 to 20 assignments simultaneously, overwhelming their associates and research staff. They operate in a “book it”, “bill it” and “forget it” environment. Unless your search is carrying the highest fees or is relatively easy to complete, it may be regulated to the bottom of the pile. In contrast, boutiques typically work on fewer projects, devoting far more time and attention to each and every search. We recognize that our partners and associates are performing at their best when they have 3-6 projects at any one time and so we take measured steps to adhere to that.

What about Completion Rates?

Boutiques have higher completion rates than big firms. Completion rates at big search firms are well-known to be in the 60% to 65% range. At Comhar Partners, our completion rate is over 90%. There are many reasons that a search does not get completed, not all of them attributed to the search firm. But, with a 90% completion ratio, you know that Comhar Partners selects projects that we know we can complete successfully. It is imperative that we do so since a large portion of our retainer is performance based and at-risk if we do not complete the project.

Does the firm have in-depth knowledge of your company?

Because boutiques have a business model that enables them to form a genuine partnership with you, they are willing to take the time to get to know you in the hope that this will be a long term relationship and not a transaction. As a result, smaller firms like Comhar Partners usually are better at selling your opportunity and assessing candidates because we know you. Combining our access to talent with our knowledge of your opportunity and applying our proven performance-based assessment -- this is where we combine the art and science of executive search as true consultants in talent acquisition.

How does the firm add value beyond the recruitment process?

At Comhar Partners we understand that your goal is to create talent management strategies to attract candidates who have the skillset to take your organization to new limits in the future. Our consultants are not only experts in recruiting but can add value

after they have found you the right person for the role. They are specialists in Executive Leadership and Cultural Assessment, Compensation Consulting, and providing Interim Solutions. We are able to accommodate and understand the needs and aptitude of each individual, in order to make the most of your potential and use your leadership skills to greatest effect. Whether your organization is looking for a new structure or advisement on compensation consulting, Comhar Partners is for you.

### Big Fish...Small Pond?

If your company plans to do more than ten searches a year, you may have enough leverage to get the attention you deserve from the big search firms. But, if your needs for search are more focused, you will get far more personalized and attentive service from a boutique. Typically, the big firms sell the strength of their network as the major selling point. The reality is that their network is full of previous placements that they are ethically obligated to never recruit again. We start each project with fresh research; by getting the specific names and contacts on individuals currently in the roles you have asked us to recruit for. No old names - new ones.

### In Summary

Bigger is not better in executive search. In fact, big search firms face significant obstacles to client service, off-limits and availability of the right candidate pool. Large scale makes it easier for search firms to build their brands, and create their own economies of scale but does it provide value to their clients? Search firms are service providers. When evaluating vendors, look past the false allure of name brands and critically evaluate the quality of service you will receive. Determine the firm's commitment to your company, assess its process and determine whether the search firm is passionate about serving your company's needs and providing what you and your company want, not what they want to sell to you.

Don't wait. Think big. Go Small.

For more information on our Executive Search Practice, contact us at:

[jomalley@comharpartners.com](mailto:jomalley@comharpartners.com)

## On the Move

+ [Follow](#) us on our LinkedIn Company Page for the latest information on fellow alumni on the move.

If you have recently changed jobs and would like to share your good news with other Alumni, please email details to [Admin@andersenalumni.com](mailto:Admin@andersenalumni.com)



# Alumni Sponsors Wanted

Andersen Alumni Association is proud not to charge annual alumni dues and relies rather on strategic sponsorship to fund operations. Given advances in technology and alumni mobility Andersen Alumni Association is seeking a few addition qualified sponsors for 2018. If you think your company may benefit from a strategic partnership with the Association, please email [Admin@andersenalumni.com](mailto:Admin@andersenalumni.com) for more information.

## ALUMNI BENEFITS:

### **NEW Medicare Medical Savings Accounts (MSA)**

Andersen Alumni Association has partnered with Medicare Caddy to provide our members with a NO COST TO YOU Medicare insurance expert to help you optimize the Medicare benefits available - wherever you live. Medicare Caddy, LLC is a licensed insurance agency that only works with existing or soon-to-be Medicare beneficiaries. Medicare Caddy KNOWS the Medicare course and is a leader in providing educational programs about the unique benefits of Medicare Medical Savings Accounts (MSAs) as well as other Medicare Advantage, Medigap and Part D Prescription Drug Plans.

Greg O'Brien is Managing Principal of Medicare Caddy, LLC. Based in Atlanta, GA, Medicare Caddy is a licensed insurance agency specializing in all forms of Medicare related insurance. Medicare Caddy has helped hundreds of people evaluate Medicare options and enroll in the plans that optimize their Medicare benefits.

Greg can be reached by email at [greg.obrien@medicarecaddy.com](mailto:greg.obrien@medicarecaddy.com) , phone 404.821.1886 or visit <https://www.medicarecaddy.com/medicare-msa/AndersenAlumni>

### **Mortgage – Wintrust Mortgage**

Andersen Alumni Association is has partnered with Jennifer Sobocienski, (*alumnus from our Andersen Chicago office*) Senior Mortgage Consultant, NMLS 755995, and Wintrust Mortgage, the 11th largest bank-owned retail mortgage originator in the country with more than 200 lending offices across the United States, to offer our members a preferred lending partner and mortgage benefit. This program offers a dedicated team of mortgage professionals to serve our members and provides a \$500 Visa gift card after closing a residential loan with Jennifer at Wintrust Mortgage. For more information about the program and Jennifer's contact information visit [www.wintrustmortgage.com/andersenalumni](http://www.wintrustmortgage.com/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](http://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](http://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 Linked in 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](http://www.linkedin.com/company/andersen-alumni-association?trk=tabs_biz_home)

To “JOIN” our new fan page simply click on the following:

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