



ANDERSEN  
ALUMNI™

## Straight Thoughts, Straight Talk

*"Serving Andersen Alumni Worldwide"*

Jul. 2015

Vol.8 No.3

**Sponsored by: Andersen Tax**



## Editorial

To come

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

## A Fabulous Event at the Beautiful Pierre Hotel in NYC!

**By Joe Toce, Managing Director Andersen Tax, New York, NY, Arthur Andersen, LLP (1976-2002)**

Celebrations of our rich history, and our incredible future as Andersen Tax began in Chicago with our April event, continued in New York in May and will conclude in San Francisco, our headquarters, on September 24, 2015.

The hundreds of Arthur Andersen alumni supporting each event so far truly has been a testament to the overwhelmingly positive feelings about the restoration of a legacy.



View and like the event photos on our [Facebook Page](#)

New York's event took place in the impressive Grand Ballroom and Garden Foyer at The Pierre on Central Park. Guests were welcomed with champagne and sparkling water and invited to have a professional photo taken to commemorate the evening and our new Andersen Tax name. A second photographer took candid shots throughout the night.

The jubilant, reunion-like atmosphere was immediately evident in the smiles, hugs and laughter which began the moment attendees arrived.

The celebration kicked off with the New York Office Managing Director, Jerry DesRoches giving a bit of history of the firm and the path leading up to our transition to Andersen Tax. Jerry then introduced Larry Weinbach, who reminded us of the values which helped Arthur Andersen rise to its pinnacle and their parallel with Andersen Tax's core values. Being best-in-class by raising standards in education, transparency and independence has led to our tremendous growth. Seamless service, regardless of location, has been instrumental in our global expansion. We aim to be the benchmark for quality in our industry and the standard by which other firms are measured, throughout the world.

I finished up the brief speeches by thanking the many people who were instrumental in our firm's success.

The night then continued with old friends and colleagues reuniting, new introductions being made and delicious hors d'oeuvres. Guests left with a commemorative Andersen Tax desk clock.

All around it was a great time, but the true sign of the success of our event is having the conversations go on even after the bar closes and the lights have turned on, not only that night, but well into the future.

Thank you to those who attended, we look forward to many more continued conversations

If you are interested in attending or remaining launch event, being held in San Francisco on Thursday, September 24, 2015, it is open to all Andersen Alumni. Email [events@AndersenTax.com](mailto:events@AndersenTax.com) for more information.

## Self-Development

By Ed Maier, *Former Andersen Partner*

In his famous book *The 7 Habits of Highly Effective People*, Steven Covey emphasizes our need to continue to develop ourselves with his habit titled "Sharpen the Saw". Simply stated by Covey, this means "preserving and enhancing the greatest asset you have--you. It means having a balanced program for self-renewal in the four areas of your life: physical, social/emotional, mental, and spiritual."

What have you done recently to "sharpen your saw?" What have you done to renew your physical, emotional, mental, or spiritual self? If you are like most, this question may be more difficult to answer than you may have thought. Oftentimes, self-development is not a priority. We allow other things to drain our time and resources so there is little left to invest in ourselves. Often we forget that self-development is our responsibility. Instead we rely on others (our company or our organization) to develop our skills. We wait for direction, guidance, or a plan of action.

For the first portion of my career at Arthur Andersen, I did not need to concern myself with having a plan to develop my mental and social/emotional skills. From the day we walked through the door we were provided with a timetable of the expected growth we would have through the organization. This was accompanied with regular communication about the types of classroom education and training that the firm would provide us. It was an excellent program to make sure that we were challenged with

learning new knowledge related to carrying out our professional responsibilities. In the early years, this training was primarily related to the technical aspects of our job – the technical subjects we needed to learn to be good accountants, income tax advisors or management consultants. As we progressed, the nature of this development began to focus on our managerial and leadership skills. We were challenged to improve our communications, our writing, our ability to solve problems and develop plans and strategy. As we began to focus more on servicing clients in particular industries, we were given the opportunity to learn more about the business environments in our respective industries. We also strengthened our social and emotional skills by participating in training sessions that focused on topics like leadership development, effective speaking and writing, leading teams, coaching and mentoring individuals, etc. Many of my colleagues in many other companies—whether they were competitive firms or businesses we were serving— had similar opportunities. Their companies were supportive in helping them “sharpen their saws”.

But as I have coached people over these past years and talked to individual clients about this topic, it is clear that many organizations no longer make a significant commitment to the development of their people. They provide their employees with the necessary training they need to use tools that are directly related to the productivity and efficiency of their day-to-day responsibilities. But training opportunities in areas such as emotional intelligence, leadership, basic managerial skills, wellness, etc. are few and far between.

So, if your organization provides you with regular self-development opportunities, then you can probably skim over the rest of this article and be thankful that you are part of an organization that invests in the development of their people. But if you are interested in “sharpening your saw” and don’t work in an organization that actively promotes you doing so, consider some of the following ideas.

The majority of us tend to live in the present; we don’t plan for the future. We may think about self-development in terms of the skills we need to enhance our productivity or effectiveness in our current employment roles. But while that might be sufficient for your current position, it doesn’t allow for future growth or changes you wish to make. And it certainly doesn’t cover the four areas that Covey says you should sharpen—physical, social/emotional, mental and spiritual. Self-development should be active, not reactive.

In past newsletter articles, I suggested you develop a plan for your career and your life. If you have done so, make sure it includes a plan for your own development needs. Consider how you can improve each of these four development areas as you work to achieve your goals. They should be part of your self-development plan.

Consider these questions. Do you have answers for them?

- What are the future skill additions or enhancements that you will need in order to achieve this plan?
- Do you have the necessary physical stamina and strength to accomplish the goals you have? If you do, what will you need to do in the coming years to maintain them? If not, what will you need to do to obtain them?

- Do you have any physical conditions that exist or may be developing that would impair your opportunity to accomplish your goals?
- Have you built or begun to build the appropriate social and professional networks that will be invaluable to you as you strive to achieve your career goals?
- Have you assessed your emotional skills? Are you aware of how your emotions and behaviors positively or negatively affect your ability to continue to grow?
- Do you understand the degree of change occurring in your industry or profession? Have you equipped yourself with the proper tools to help you manage that change and its impact on your future?
- What are the changes that are happening in your industry or profession that might reduce or eliminate sufficient portions of the knowledge you presently have about that same environment? There have been studies that indicate that knowledge you obtain today has an expiration date of two years—often even less. What are your plans to renew yourself every two years?
- As you move through various stages of your own growth, (business, not-for-profit, government, academia, etc.), do you have the necessary knowledge to continue to achieve success? Does your plan recognize the changes in responsibilities you will have as you move from an associate to a managerial role to a leadership role? Have you factored in the type of development you will need to effectively work in those roles?
- What about your industry? Do you understand the developments that are occurring in your industry and the rate at which they are changing?
- What are the types of moral or ethical challenges you might face in the future of your industry or your profession? Are you sufficiently self-aware that you will be able to handle those challenges when you are faced with them?
- Is some form or degree of spirituality an important part of your life? If so, how have you accounted for continued development in that area to help you achieve your goals.

These are a mere sampling of the types of developmental issues you will continue to face as you build your life and your career. The wise person is one who considers these needs as they plan their continued growth.

Once you decide what types of additional learnings you need to progress in your plan, there are plenty of sources in the environment to help you build your developmental direction. Consider these:

- Business-related developmental areas include technical skills related to your industry and products; managerial skills to run teams, groups and businesses on a day-to-day basis; and leadership skills to lead organizations. For development opportunities in these areas, I recommend you look to your company and your industry first. Although many businesses have reduced their commitment to expenditures for individual development. However, you should always start there and ask about assistance that they will offer. What types of in-house training programs do they offer to different people in the company? What types of external training or knowledge programs do they offer? What do they pay for, what do they expect their employees to pay for? Research your industry. Are their specific industry programs that exist to help you expand your knowledge?

- Identify them, evaluate them and take advantage of them. Consult with your human resources department, or your boss, or your mentor.
- Strengthening your physical, emotional and spiritual well-being may also be supported through your organization's development programs. But in case they are not, there is a wealth of information available to you on the internet to do some basic research in these areas. In addition, don't hesitate to consult with members of your community—friends, relatives, etc. With respect to your health and wellness management, talk to your doctor or even your health insurance representatives. More and more of these health-related businesses want to help you manage your health. They can offer a variety of ideas to help you focus on “preventive maintenance” versus “repair”.
  - And don't forget the explosion in information technology to help you build your development plan. For example, one day I Googled “develop emotional intelligence” and the hits for that alone were over three million.

There are plenty of sources out there for you to use to help you build your development plan.

Another idea to consider as you muse about your own development is this: How do you like to learn? From my own reading and participation in educational and informational programs, I learned something about how people “learn”. When it comes to cognitive learning, each of us has a preference to learn differently. Some prefer visual learning; some prefer auditory learning; some prefer kinesthetic learning. No doubt each of us learns to some extent from each of these styles, but each of us also has a primary preference. If you can learn using your preferred style both your commitment and comprehension will be higher. Ultimately, your self-development will be more successful.

Visual learners use objects they can see. They like graphs, pictures and charts. They can also read body language very well and perceive their surroundings well. They are usually good at memorization and recall of information; they have a tendency to remember things that are written down. When they participate in lecture presentations, they learn better by watching the lecturer.

Auditory learners retain information that they hear and when they speak. They like to be told how to do things and use their listening skills to aid in memorization. They will also often repeat things they hear as an added contributor to their ability to retain the information. While the visual learner reads body language well, the auditory learner notices different aspects of speaking—nuances by the speaker, different volumes and speeds of different speakers, etc. Because of their use of and reliance on auditory skills, they also are people who are talented musically; soft background music may help their concentration.

Kinesthetic learners prefer to use a hands-on approach to learning. They would rather demonstrate how to do something rather than verbally explain it. They also learn better when they see the learning in action rather than listening to lectures. This type of learner also often prefers working in groups more than the other learners do.

<http://blc.uc.iupui.edu/Academic-Enrichment/Study-Skills/Learning-Styles/3-Learning-Styles>).As you plan your self-development, consider your learning style as part of the process.

I have frequently heard the statement: “If you aren’t changing, you aren’t growing.” I would add that if you aren’t learning, you aren’t changing. As you plan your life and your career, a significant part of that plan should be for your continued development. Sharpening your saw is your responsibility. As you plan your life your career, answer the question, what you are doing to preserve your asset—to renew yourself in these four areas of your life?

As always, I am interested in your thoughts. Please write [ed@thinkstraighttalkstraight.com](mailto:ed@thinkstraighttalkstraight.com) and have a great summer!

## Does LinkedIn Really Get Better When You Pay For It?

By **Wayne Breitbarth**, *Andersen Alumnus*

Is it worth it to start paying for a premium LinkedIn account?

I can always count on hearing this question during the Q&A portion of my LinkedIn presentations. Since the pricing and options changed in January 2015, I think it’s time to address this once again.

### How many people are currently paying for LinkedIn?

The results from [my latest LinkedIn user survey](#) show that only 18% of us are paying for our LinkedIn



experience. That number has been consistently rising since I began my survey five years ago, but the

majority of users are still taking advantage of the world's largest database of business professionals for free.

## **LinkedIn premium options**

There are a number of options available when you decide to upgrade from a free account to a paid account.

Note: If you already had a premium account when LinkedIn updated the premium options, at least for the time being you can continue with that plan even though it may not be currently offered to new



subscribers.

There are three premium categories, with multiple options within each category.

General: Job Seeker (\$29.99), Business Plus (\$59.99), Executive (\$99.99)

Sales: Sales Navigator (\$59.99), Sales Navigator Professional (\$79.99), Sales Navigator Team (\$129.99)

Recruiter: Recruiter Lite (\$119.95), Recruiter Corporate (\$899.99)

Each plan offers different features and additions to your free account. Check out the side-by-side comparisons of the additional features you get at <https://premium.linkedin.com>. If you're interested in a free 30-day trial of a premium account, get the details [here](#).

## **Is it time to upgrade?**

For most people, probably not. I base that opinion on what you get with a premium account and the fact that most people I encounter are barely scraping the surface of the free account's powerful features. It's kind of like handing your 15-year-old, who just got his driver's permit, the keys to your new BMW when he isn't even ready to drive the 12-year-old Honda Accord.





My advice is to buy a [copy of my book](#) and follow my suggestions for optimizing your profile. Next, spend some time getting into a good LinkedIn routine (Chapter 17), and then maybe you'll be ready for the BMW.

LinkedIn has a simple way to let you know when it may be advantageous to start paying. I call it running into the “free wall.” When you're consistently using a LinkedIn feature (Advanced People Search, Saved Searches, InMails, Who's Viewed Your Profile, etc.), a message will pop up asking you if you want to upgrade and receive greater access to that feature. LinkedIn realizes full well which features help users get the best results, and thus those tend to be the features they limit in some way. If you want more of those goodies, you'll need to get out your credit card.

### **Why I upgraded to a premium account**

Two years ago, after more than four years on a free account, I started paying. Currently I'm on Sales Plus for about \$48/month. However, this option is not currently available for new premium users.

The main reason I upgraded is because I wanted to see all the people who looked at my profile, and with the free account you can only see the last five people who checked you out. For a full discussion, read my post [“Why I've Finally Upgraded to a Premium LinkedIn Account.”](#)

Whether you're using a free or premium account, I hope you're getting great results!

*Wayne Breitbarth, an Andersen Alumnus, is a Social Media Trainer Speaker, Consultant and Author of “THE POWER FORMULA FOR LINKEDIN SUCCESS” He can be reached at [wayne@powerformula.net](mailto:wayne@powerformula.net)*

# In the Fog of Fatigue

By John Blumberg, *Andersen Alumnus*

I was deep into clearing my editor's comments on the manuscript of my upcoming book, *ROI: Return on Integrity*. Jay, my editor, is really good! You might say he is very thorough ... pushing me on depth and clarity. In so many ways, he's asking me to do precisely what I'm asking my readers to do ... think and then think some more!

I was in the midst of hours upon hours, pouring over pages and pages of the complete manuscript, when I could feel myself starting to think ... *whew; I'm so tired of thinking about all this values stuff*. It was a good experience for developing my own empathy for what might be the main dilemma every reader and leader will face: Building a return on integrity takes a whole lot of thinking about core values!

## **It's an issue when you write a book about just one thing.**

And it's a practical dilemma when you're a leader trying to build a return on integrity. The first section of the book is actually called *Dilemma*. It's an attempt to shine the light on the positive and negative forces that put pressure on core values. This initial section positions a leader to walk into their commitment, of building value with core values, with their eyes wide-open. Yet, little will prepare any motivated leader for this main dilemma they will face. It's called values fatigue.

I'm not talking about a fatigue from living their core values. That will be energizing. I'm talking about leading it. In a world besieged by constant change, followers addicted to branded one-liners, buzz-filled "flavor of the month" initiatives, and short attention spans, it's hard to continue to think about the one thing. For me, it reprises the old management philosophy from the last century ... *the main thing is to keep the main thing, the main thing!*

No one ever said that keeping the main thing as the main thing would not create leader fatigue. It simply said it was the main thing for a leader to do. We like variety ... and we can get all the variety we want whether we need it or not. I recently heard a statistic indicating that more information has been produced in the last 2 years than in the history of mankind. And, I would add, we're in slow motion compared to where we're headed.

## **Wisdom is steadier than data.**

Data comes and data goes. Ideas come and ideas go. Issues come and issues go. Pet peeves come and pet peeves go. Yet, in a world of variety, sturdy and steady have their way of creating the fatigue of sameness. A friend, recently and unknowingly, shared with me how he has categorized me as a "one thing." He told me, regardless of the topic

at hand, "whenever you call me, whenever you email me, or whenever you even cross my mind, I automatically start thinking about my core values." I'm not sure if my friend was sharing a compliment or confessing an imposed curse!

I think this values fatigue can actually catch a leader by surprise. Leading a return on integrity, through a culture that builds value with values, has a great deal of complexity and variety within it. It's like one prism constantly turning while reflecting a rapidly changing world around it. What you can experience is endless, yet what you focus on is always the same one thing. Core values.

I'm fascinated as I learn about the precise focus of the product line of some companies. Their entire composite of knowledge, resources, talent and energy is invested in one product ... sometimes what is just one part of what will eventually become one element of someone else's product. It's their one thing. Our day-to-day world functions because so many are laser focused on their one thing. It seems a bit different when it comes to leadership.

**It's easier to move-on than to stay-on the one thing.**

I know firsthand. I have no doubt a battle of fatigue awaits for any leader who embraces a commitment to build a return on integrity. Followers, who fall into leadership positions, won't have to worry about this fatigue. They will just move-on to their next buzz-branded initiative. Leaders, in leadership positions, however, will have to likely face this dilemma of values fatigue.

I wouldn't be surprised, assuming you are still tracking with me here on the *Front Porch*, if you are wondering and waiting for the "values fatigue" magical solution. For once, there actually is one.

**It's the one thing.**

All a leader (or an author) has to do is look to their core values. Therein lies everything you need to take the next step, make the next decision, clear the editor's next question ... and clear the fog of an episode of values fatigue. Just look to your core values. It really is amazing how the main thing deals with the main dilemma. It's an important data point to understand before you ever begin the journey!

*Editor's Note: "ROI: Return on Integrity" releases very early 2016. Warning: It's just about one thing!*

*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](http://www.keynoteconcepts.com)*

# Getting Culture Right is the Key to a Successful Hire, Lessons Learned From Working Within A Great Culture

By J. James O'Malley, *Former Andersen National Director of Experience Recruiting*

As a headhunter, job number one for me is getting the right person hired. My clients count on it and my candidates place their trust in me. So why do so many companies, candidates and headhunters fail in getting that right person in the right seat at the right company? It's pretty simple: we don't spend enough time on **culture**!

Recently, I spent a weekend on a retreat at the Q Center in St. Charles, Illinois, with 70 former colleagues from my days working at Arthur Andersen. The Q Center, a bucolic campus-style training facility, was the site of Andersen's learning and development center. As most of you are well aware, Andersen ceased to exist in 2002. What caused 70 former colleagues to give up a precious weekend with their families and spend two days together at a retreat, 13 years after the firm ceased to exist? **Culture**.

If Andersen was still in existence, I am convinced that I would still be working there. Although I was only employed by the firm for a little over two years, my time there had a profound impact on my career and life. I am an anomaly; given most of the participants at the retreat were Andersen lifers, employed by the firm right out of college and drinking the Kool-Aid from day one, which was more than likely spent at this very same campus in St. Charles. Culture had (and still has) such a profound impact on the people of Andersen that even now - 13 years after the firm closed shop - it still draws its people back, as well as together. There is a very strong tie, stretching back decades among former Andersen partners and employees who have moved on to successful careers at firms including Deloitte, KPMG, Grant Thornton, Huron Consulting, Navigant and West Monroe Partners, to name just a few. Put a few together in any situation and, before long, we'll be waxing nostalgic for the "old" Andersen culture.

Culture is defined as shared values that drive behavior. Peter Drucker wrote that "*Culture eats strategy and vision for breakfast*". That's probably why this retreat has me thinking about how my clients can create strong and sustainable cultures. Using my Andersen experience as a lens, I've come to two conclusions about great workplace cultures. First, great cultures really do stand out - the culture is tangible and you can feel it. Secondly, I firmly believe that culture must be real, actionable and honest. Closing the gap between

what you say and what you do at Andersen was called “Think straight, Talk straight”. Hypocrisy kills culture.

So, what does all of this have to do with recruiting and assessing for the right culture? Well, a few things:

- Companies need to begin to openly share their values and live by them. Additionally, consider another dimension of corporate culture: it’s often aspirational, rather than a reflection of current reality. Need objective proof? Pick a large corporation and take a look at the way culture is described on the website’s pages devoted to HR. Then, ask a friend who works there what it’s really like. Every culture has positives and negatives. That’s why employers need to stop speaking aspirationally about culture when hiring, so as not to confuse the candidate and/or themselves.
- Companies need to devote time and training to make sure that those doing the hiring are truly assessing the job candidate’s values - rather than some other characteristics - and that those values are consistent with the values of the company.
- If your company decides to hire an individual whose values are not aligned with those of the company, you must be prepared to lose them. Turnover is so often grounded in cultural mismatches.

A final word about the Andersen retreat. There are a few special occasions in life - family events or class reunions, for example - where you can enter a room and immediately feel a connection to others at the gathering. There is a sense of community and, even if years have passed, a strong camaraderie that allows you to pick up a conversation if you’d just seen the other person a few days ago. That, in a nutshell, pretty much summarizes the atmosphere at the retreat I attended and makes the best case, in my opinion, for developing and nurturing a strong culture that lives on long after the company is gone.

Author: J. James O’Malley  
Partner  
**TalentRISE LLC.**  
550 W Washington Blvd.  
Suite 300  
Chicago. IL. 60661

312.878-4104 (o)

312.479-3367 (m)  
jimomalley@talentrise.com  
[www.talentrise.com](http://www.talentrise.com)  
[www.linkedin.com/pub/j-james-o-malley/0/192/695/](http://www.linkedin.com/pub/j-james-o-malley/0/192/695/)

For more musings on this topic, go to <http://talentrise.com/2012/12/the-myth-and-the-reality-of-cultural-fit/>

## **Social Media: Association's LinkedIn Group (Join) and 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>

