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# **How to know when you have a great workplace**

**By Kimberly Scher, APR**

**Dedicated employees with the right experience are worth more than their weight in gold, especially in today's competitive job market. However, finding and keeping top performers takes more than sizable salaries. In many cases, a healthy work environment can make the difference between a productive workforce and crippling turnover.**

Catalyst magazine looked at the employment practices of several award-winning “best places to work” among Ohio Society members. Their practices provide valuable insights and tie closely with current and future workplace trends nationwide.

Plante & Moran, PLLC, the nation's 12<sup>th</sup> largest CPA and business consulting firm, was ranked 44<sup>th</sup> on *Fortune* magazine's “100 Best Companies to Work For” list this year. The firm has been named to the list for 10 consecutive years. Cohen & Company is a regional CPA and business consulting firm named first on the Ohio Chamber of Commerce's 2008 list of “Best Employers in Ohio” in the small/medium companies category. This is the firm's second year in a row on the list. The Ohio Chamber also named SS&G Financial Services, a regional CPA, business advisory and management consulting firm, as one of the “Best Employers in Ohio” in the large company category for the third year in a row.

In general, top-ranked employers are recognized as such because they offer a caring and collegial organizational culture. They demonstrate this through the company's mission, employee development opportunities, flexible work arrangements, recognition and reward programs and overall alignment between “people practices” and the organization's business objectives. Many also offer fun perks and special “buzz words” to address employee attitude, accomplishment and service.

## **A CARING AND COLLEGIAL CULTURE**

Companies that provide a great workplace universally reap rewards. Highly satisfied employees can be powerful ambassadors for their company – extolling its virtues to clients, customers and colleagues. What's more, motivated employees provide outstanding service that translates into highly satisfied customers or clients. The loop continually reinforces itself, resulting in growth and profitability for the company as well as strong employee and customer retention.

Plante & Moran calls this the *Wheel of Progress*. “We're well aware that our staff is directly responsible for our success,” said Robert Shenton, CPA, managing partner of Plante & Moran's Columbus office. “We believe that hiring good staff who do good work results in good clients who pay good fees. That enables us to pay good wages, which then allows us to retain good staff. It's time tested and it works.”

Over the past 10 years, the firm has tripled its revenue and nearly doubled its number of staff. In addition, the firm has a low 12.4% annual staff turnover.

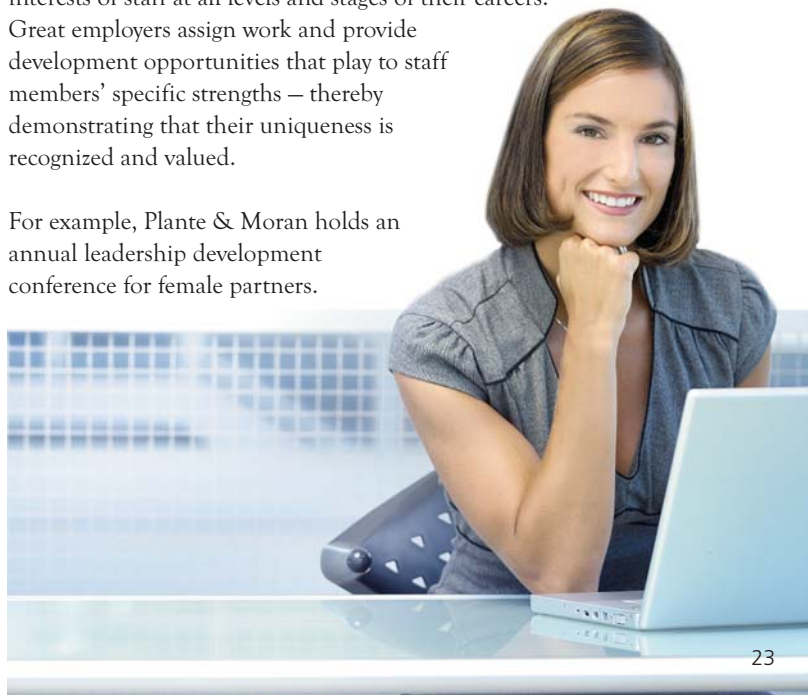
## **PROFESSIONAL DEVELOPMENT AND MENTORING**

Likewise, SS&G, with its strong emphasis on staff professional development, has a low 13% voluntary staff turnover rate. The firm's *Superior Service Guaranteed* commitment has resulted in a 98% client satisfaction rate. All this ties directly to training. “We continue to put significant effort into our professional development program. It provides the educational resources for our employees' daily roles and responsibilities and lays the foundation to help them become experts in a designated area,” said Gary Shamis, CPA, M.Acc., SS&G managing director. SS&G sponsors more than 400 hours of in-house continuing professional education annually. Course options and instructors are reviewed and evaluated by an in-house committee. Staff members also have the option of attending local or national external courses sponsored by The Ohio Society and others.

At Cohen & Company, the *Cohen College* covers everything from a full week of new hire training, to a three-day fall retreat for all staff. The firm also conducts ongoing training in proactive planning, networking and developing personal marketing plans for each staff member. Additionally, the firm encourages staff to seek outside training and then share their new knowledge internally.

In addition to broad training programs, best employers also address niche or specialized needs, skills, competencies and interests of staff at all levels and stages of their careers. Great employers assign work and provide development opportunities that play to staff members' specific strengths – thereby demonstrating that their uniqueness is recognized and valued.

For example, Plante & Moran holds an annual leadership development conference for female partners.



SS&G sponsors the Becker CPA review for their freshman accounting professionals. SS&G places further emphasis on developing future leaders of the firm through its *Next Generation Leadership Program*, which covers the traits critical to being a successful leader in the firm. These include: how to build effective teams, make presentations, develop a practice and handle financial matters. A centerpiece of the program is *The 7 Measures of Highly Effective People*. A director's retreat is also held annually, allowing all associate directors and directors to improve their soft skills.

Beyond skills-based education, best employers also recognize the importance of sharing knowledge and experience through comprehensive mentoring programs.

"SS&G's mentoring program communicates our firm's culture to all staff and helps employees grow and learn," Shamis said. Employees are assigned a mentor from among their top three choices to discuss issues, difficulties, goals and future action items. Mentors have many roles: serving as a sounding board and role model, providing career advice, assisting with networking, and helping interpret and apply performance feedback.

"The program helps staff members learn faster, develop self-confidence, better adapt to their jobs and work environments, and become more productive and satisfied with their jobs," Shamis said. "Our goal is that each mentoring match develops into a long-term, mutually beneficial relationship with SS&G."

At Plante & Moran, each new staff member is assigned a "buddy" as well as a team partner. These mentors receive training on how to best help new staff acclimate to the firm. "Mentoring helps develop staff loyalty and morale from day one," Shenton said. New staff members frequently cite the buddy program as their favorite aspect of orientation. "And these buddy relationships tend to last. There are examples of extended and enduring friendships resulting from buddies meeting grand-buddies and great-grand-buddies," Shenton said.

With regard to terminology, the firm doesn't use "employee" but rather "staff" to indicate that people work *with* rather than *for* each other. Furthermore, the firm proudly proclaims that it is "relatively jerk-free" in its philosophy statement. This stems from founding partner Frank Moran's assertion that the firm does not hire "jerks."

Cohen & Company conducts its mentoring program in two phases. Initially, each new employee is assigned a *Learning Buddy* who makes introductions to other staff, answers questions and shares the firm's culture. After six months, the new staff member is encouraged to select a formal mentor who helps him/her create a plan for professional growth within the firm. The mentor also facilitates the annual evaluation process.

"Formal mentoring and coaching are great, but only when they support the grassroots care and concern from consistent, one-on-one interaction. We all remember the times when someone took a personal interest in our career, so we know how important it is to share that with others," said Randall S. Myeroff, CPA, president and CEO of Cohen & Company.

## FLEXIBLE WORK ARRANGEMENTS

Providing personal flexibility for staff is a universal hallmark of great employers. They demonstrate sensitivity to staff at all ages, life circumstances and stages of their lives — singles, couples, parents with young children, childless couples and those providing elder care. Flexibility takes many forms:

- Working from home or part-time work
- Flexible work hours
- Job-sharing
- Periodic opt-in and opt-out project arrangements
- Onsite daycare
- Elder care subsidies
- Paid time off and sabbaticals

A major cultural change among best places to work is allowing employees to choose a non-traditional schedule in the office without necessarily derailing their careers.

"The formula to a sustainable work/life balance is to hire disciplined, caring people, make sure they buy into our culture, and then respect and recognize individual needs within that framework," Myeroff said.

"We accept that as our staff attends to family and social responsibilities, their work life may, on occasion, take a backseat to their personal life," Shenton said. "When Frank Moran spoke of staying on the tightrope, he recognized that the whole person comes to work. Someone focusing too much on either work or personal life can get out of balance, causing one aspect to suffer." The firm formed a *Parenting Tightrope Action (PTA)* committee that analyzed the needs of parenting staff and introduced a variety of dynamic programs and policies, among them:

- A *PTA Buddy Program* that pairs expectant mothers with a staff member who has had a child and is familiar with the firm's parenting policies and practices
- Free, onsite child care on Saturdays during tax season



- Expanded part-time work opportunities, including compressed work weeks, extra hours during tax season with summers off, and job sharing
- A *Non-traditional Careers Policy* that guarantees that staff members working a non-traditional schedule are considered for promotions up to and including partnership

Most great employers also offer a broad and flexible menu of benefits – beyond what is required by law – to meet different family and personal situations. These may include tuition assistance, dental and vision coverage, extended parental leave and disability insurance.

The increased workload heaped on CPAs in recent years due to stepped-up compliance requirements poses a challenge to firms and companies that value work/life balance. Management’s willingness to work with staff to provide flexibility, avoid burnout and keep things interesting is key to maintaining a great work environment. In 2001, Plante & Moran initiated a partner sabbatical program that provides paid sabbaticals of 30 consecutive days after every seven years with the firm.

SS&G offers summer bonus hours as a reward to employees who work more than a pre-established number of hours per year. They receive up to 20 additional hours of paid time off to use during the summer months. About 18% of SS&G’s employees work part time on a variety of schedules based on their needs. The firm even has employees who work only during tax season. “Flexibility helps the firm retain many of its great employees,” Shamis said. “Technology assists us with telecommuting and allowing employees to work remotely or from home.”

## EVALUATING, REWARDING AND RECOGNIZING STAFF

Among great employers, showing appreciation and recognizing good work and extra effort goes beyond traditional performance management bonus and compensation programs. Recognition activities occur throughout the year to relieve stress, build comradery and team spirit, boost morale and reinforce the company’s culture, values and philosophies. Gifts take many forms, from spa and restaurant certificates, to gourmet foods and beverages.

SS&G holds quarterly breakfasts or lunches to recognize employees for excellent customer service. Its *Super Service Group* includes staff from all levels and departments who tackle a wide range of projects while developing leadership and project management skills. SS&G holds an annual firm retreat to celebrate years of service and provides a “*Boomerang Award*” to returning employees. The retreat celebrates new business wins, certifications and licenses earned along with new client referrals.

During tax season, Plante & Moran holds a variety of fun events and theme days including miniature golf in the office, partner-prepared breakfasts, ice cream Thursdays, milk and cookie breaks, and baseball opening day parties with ballpark food and TVs tuned to the game.

Plante & Moran’s annual firm conference is a spirited, information-sharing event that involves staff at all levels in skits:

- A cooking segment that highlights diversity recruitment
- A Saturday Night Live-inspired skit about the audit process
- Commercials featuring staff from several offices
- A game show modeled after the popular “Deal or no Deal” show
- Hilarious and heartwarming partner speeches

Ongoing employee evaluation and feedback are crucial to keeping employees on track. SS&G reviewers keep notes on performance throughout the year. The firm publishes “*criteria to advance*” guidelines on its intranet site that map out the expectations employees must meet to advance to the next level. Leadership on firm committees, in professional and community organizations and new business prospecting is encouraged, as is development of concentrated technical expertise.

In addition to the technical competencies and client-related skills evaluated as part of its comprehensive *Performance Management and Compensation* program, Plante & Moran also reviews staff adherence to the firm’s values and philosophies.


Cohen & Company’s annual evaluation process solicits feedback from peers who have worked with an individual during the past year. Evaluations are based on a “three-legged stool” philosophy: client service, technical expertise and community service. To remain in balance, each leg of the stool must be equal. “As accountants, we need to keep current with the newest laws and regulations. As business advisers, we need to have a network of people who can help our clients in situations that we cannot. As individuals, we need to serve our clients with the highest level of respect and attention,” Myeroff said.

## ADVICE TO OTHERS

Firms and companies striving to be a great place to work may wish to consider advice from recognized leaders.

Cohen & Company reaches out to clients and employers under a set of core values called SQIF, which stands for *Service, Quality, Innovation and Fun*. The firm emphasizes service to its clients and peers. It defines quality as going beyond expectations. Through innovation, it continually brings new ideas to the forefront. And it always emphasizes the importance of having fun and enjoying all aspects of the work.

Plante & Moran has followed the Golden Rule philosophy for more than 80 years, striving to “Do unto others as you would have others do unto you.”

This philosophy is echoed in SS&G’s summary of their successful approach: “Let your employees know that you care about them, their career and their well-being. Take the time to listen to what they want and need. Give them work-life balance and remember that not every employee wants the same thing. Small gestures, like saying thank you, can go a long way.” 

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