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From the August 2009 Issue

“If I were running this place, I’d do things differently.”

For 17 years, Chris York, CPA, watched as the partners at his former practice continued doing things the same way, year in and year out. Despite the significant changes in technology that the profession was experiencing, there would be no evolution at that firm, not on their watch. Or at least that’s the impression they gave.

From Chris’ point of view, the practice was suffering under its own administrative weight. He had served in most of the firm’s departments during his tenure, had seen the areas that he thought were losing the battle for productivity, and had kept up with technology enough to know that there were proven solutions on the market that could enable even that very established practice to operate more effectively and provide better client service.

For a time, things seemed to show promise. A new managing partner was named whom Chris knew to be much more receptive to change. But the old guard prevented even this partner from making the decisions that both he and Chris thought were necessary.

So they examined their options — either continue to work at the technologically stunted practice the way that its legacy shareholders had, which would ensure a continuation of professional frustration, or....

So one day, they decided the “or” was the best path for them.

Chris York and Glen Thomas, the fellow CPA and managing partner at Chris’ prior firm, struck out in October 2007, forming the new practice of ThomasYork,

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development entities and high net worth individuals. Shortly after founding the practice, the two also acquired an existing San Ramon bookkeeping practice, Martins Accounting & Management Services (www.martinsams.com),	Partner, ThomasYork LLP www.TY-LLP.com San Ramon, CA Productivity Score: 380		
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which continues as a separate entity under the same name, offering business services, payroll management, write-up and virtual bookkeeping.

Although operating for less than two years, Chris and Glen have built up an impressive practice, with a staff of 19 (including Martins AMS) and a client roster that includes several hundred million dollar-plus businesses. Perhaps the most notable early client win was the addition of one of their former firm's largest clients, an infrastructure-oriented construction business that has since grown from \$50 million in revenues to more than \$150 million, and recently was awarded the first stimulus project in California.

In order to build a more productive work environment, one of Chris' initial efforts was establishing a policy of value-based, flat-fee billing. This means that the firm never bills by the hour and doesn't use time management technologies. While this removes a great deal of bureaucracy from day-to-day work, he admits that it makes staying on top of productivity a challenge.

"We have started to implement tools to achieve greater efficiency, but removing the tedious tasks associated with tracking and reporting time has given

us more time to provide client service,” Chris stated. “This leads

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the AICPA's TECH+ show in Las Vegas, as well as events sponsored by Boomer Consulting. The firm has implemented an integrated suite for client service and engagement management functions, offers client portals for collaboration, and uses a variety of hosted applications for client document management, virtual bookkeeping and accounts payables. All staff have laptops for remote work and multi-screen monitors at their office workstations. Technology has also enabled the firm to attract clients as far away as Seattle, Phoenix and San Antonio.

For a new practice, the firm's score of 380 on The CPA Technology Advisor's Productivity Survey is impressive and shows their willingness to adopt new technologies

and workflow processes. The Productivity Survey

(www.CPATechAdvisor.com/productivity)

is a free technology assessment tool for public accounting and tax practices. ThomasYork, LLP is likely to see continued improvement in its score as Chris focuses the firm's future infrastructure even more on virtual servers and SaaS applications.

Technology has also helped Chris stay connected with the part of his work that he loves the most — client interaction. Using remote access and hosted programs, he and his staff are able to work remotely as needed or as wanted, often more than once per week. The firm also employs a completely remote tax manager, Monica Lawver, CPA, who works from Ohio.

For both the staff and the partners, this flexibility results in a more appealing and comfortable environment. “From a partner's perspective, helping staff achieve a balance in their work and personal lives results in greater productivity and the ability to retain the best professionals,” according to Chris. And the firm's “life-work” system takes the concept a step further than many.

In addition to not tracking time for billing purposes, they also do not rigidly

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A staff group called The Fish! Committee (inspired by the movie "Fish!") also helps with entertainment by organizing group activities, including a post-tax season dinner, summer and Christmas functions and an annual Easter egg hunt. For temporary, in-office breaks, the office has a "den-like" area with oversized chairs, a big-screen TV and a Wii gaming system, which is often used for tennis and bowling tournaments during busy season. The practice isn't all fun and games, but occasional fun and games can help. "If somebody needs to take a Wii break, they go and take a Wii break," Chris jokes.

He has also enjoyed the benefits of remote access and a more relaxed work environment himself, rarely putting in more than 10 hours per day at the office, even during busy season. This allows him to spend more time with his wife Lynn and their three boys, Jacob (12), Sam (10) and Ryan (8), who are usually busy with baseball, golf, soccer and other activities. They also have two dogs, two cats and a lizard.

In addition to keeping up with the boys, the family enjoys outings in the Bay Area and is about to join Lynn's extended family for an annual reunion in the Sierra foothills. The mountain environment provides an almost completely technology-free 10-day break, which Chris convincingly says he is looking forward to. "It's great to sit down and truly relax, be with family and watch the kids playing with their cousins."

Both Chris (a native of San Ramon) and Lynn are involved in their community, helping to volunteer with youth sports and serving on the board of an annual golf tournament that supports Teens for Life, a Bay Area teen suicide prevention organization.

In his work and personal life, Chris ultimately believes that you get what you put in. "I guess it's a form of Karma, but if you treat people

right, most will do the right thing; and you'll end up happier and with

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