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To say that accounting professionals have seen some changes over the past few decades is, quite obviously, a major understatement. As with other professions, the continuing development of technology has had a dramatic impact, changing virtually every aspect of how accountants practice, from client work and communications to practice management and internal workflow processes.

These advancements in technology, along with the changing accountant-client relationship, have also led many firms to change the services they provide. That has been the strategy of Brotemarkle, Davis and Company, LLP (BDCo; www.bdcocpa.com).

Located amidst the vineyards of the Napa Valley, the St. Helena, California, accounting consultancy has evolved significantly since its founding in 1979.

By 1995, BDCo had grown into a successful, yet generally traditional firm. That's when Craig Underhill joined the practice, with a goal of helping the principals transform it into a more productive practice. The CPA and CSPM (Certified in Strategic Performance Management) wasn't looking to change the practice just for the sake of change. He saw several trends emerging in the profession, including the commoditization of many services, and he knew that for a firm to continue to succeed, it needed to work smarter and focus more on its client relationships ... or as he prefers to say, its customer relationships.

"I think many firms focus too much on the end product, whether producing financials, a tax return or other engagements," Craig notes. "Almost any accounting practice can deliver those products, and business owners know

this. The key is developing loyalty, and that comes through building strong

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toward its vision. The firm went paperless nearly 10 years ago, uses multi-screen monitors on all of its workstations, and offers remote access capabilities for its 15 team members. The firm has also developed a customer tool on its website called Cash Builder. As well, Craig manages and writes the firm's Perspective blog (<http://blog.bdcocpa.com>). Because of its successful implementation of

technology at many levels, **the**

practice scored a 390 on *The CPA Technology Advisor's Productivity Survey* (www.CPATechAdvisor.com/productivity),

a free tool that helps accounting and tax practices assess and benchmark their use of technology.

Other transformations over the past 15 years have led to the firm moving away from write-up, payroll and other services that were once mainstays of the profession, and toward a more consultative model, with business services including strategic performance management, financial forecasting, helping customers develop and monitor key performance indicators, team facilitations, leadership development, and compensation planning. The practice also performs A&A engagements, tax

	Craig Underhill, CPA, CSPM Emperor of Enlightenment (yes, his real title) Brotemarkle, Davis and Company, LLP www.BDOCPA.com St. Helena, California Productivity Score: 390	
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compliance and planning services. The firm's transformation has been largely

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as well as identify untapped opportunities, measure results and maintain better internal accountability.

"Accounting and business management principles are a mystery to most business managers and owners, and this is mostly because the accounting profession has essentially developed its own language over the years," Craig noted. While he was intrigued by the concept of accounting's "secret language," and it was one of the reasons he was drawn to the profession, he's made a mission out of trying to create a better level of business and financial understanding among his customers.

"With any type of business, public accountants can really help their customers by acting as educators of financial information. By increasing their business IQ and helping them understand how specific business actions can affect things like cash flow or their P&L, we are also helping them be financially stronger and more successful."

For the 400 or so wineries in the Napa Valley, this education can be especially valuable, since Craig sees many owners who are often overcome with the romantic aspects associated with producing wine. "It's a challenging and very heavily regulated industry, so not only do they need to have a very sound understanding of financial management, but also of various state, national and international issues that can affect vintners of any size." To assist clients with accounting requirements in other countries, BDCo is affiliated with the Alliot Group (www.alliotgroup.net), a worldwide alliance of independent accounting, legal and consulting firms.

In addition to being good educators, though, Craig also believes that accountants must be good learners. "We can never know our customer's business

as well as they do, but in order to help them with their business processes,

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actually on his business cards, and it fits him well, considering his goal of educating his business customers. “We try not to take ourselves too seriously around here, so we decided to have some fun with our titles.”

The firm also helps foster a positive work-life balance by allowing the team flexibility around family events, as well as hosting annual parties, outings and various goal-based awards that can include cruises or other vacations. The firm even has a Quality of Life committee that looks at both productivity and the team needs.

An avid photographer, when Craig is away from the office he is often trekking the Napa Valley. “Even when I don’t have my camera, I tend to look at things through a lens; it helps me visualize situations more clearly.” With the vineyards and lush hillsides as a backdrop, he is certainly never lacking for inspiration. Many of his pictures are included on the firm’s blog.

Many members of BDCo’s team are also active in the St. Helena and Napa communities. Craig serves as the board chair for Junior Achievement of Napa County and in a leadership role with his church. Other team members are active with Rotary, Kiwanis, Soroptimist International, the Sierra Club and other organizations.

“There’s more to life than just practice, revenue and paychecks,” Craig says. “We want our team to have time to be involved in the community, to be good friends and neighbors.” Their community involvement isn’t just about marketing the practice, though. “When people go out and do something that is important to them and that they love, it helps make them a better person and member of the community.”

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