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**Jim Boomer • Jul. 22, 2015**



Retention is a huge challenge for CPA firms across the country and most of the focus and discussion is on accounting staff. What isn't addressed nearly enough in articles, presentations and the general structure of firms is retaining talent in important functional areas such as IT, HR, Marketing and Training/Learning. Filling these positions with a superstar who truly understands our profession and what makes the firm successful can be quite challenging. So when we find these people, at least some of our retention focus should be directed at them.

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often attrition as those that don't move up, move out to industry, another firm or something that better fits their desired lifestyle.

### Functional Career Paths

When you look at the more functional, operational roles within the firm (IT, Marketing, HR and Training/Learning), the same formal career paths don't exist. And it's typically a pretty flat structure. If we look at IT specifically, you'll have a CIO or Director of IT at the top and then, perhaps, a team underneath. Some of the larger firms may have another level of two in between but for the most part there aren't a lot of clear advancement opportunities for those that aspire to make it to a leadership role.

### Advancement Options

Faced with limited opportunities to rise to the next level, many of these talented professionals are faced with a decision. Either they leave for other opportunities or they wait for something to happen that will propel their advancement. They can wait for the person above them to retire, be lured away by an amazing opportunity and more money at another organization or they make a major misstep and are asked to leave. From a more morbid perspective, there are also the alternatives to wait until they literally hit their end of life.

### Rejected

One of the leading CIOs in our profession said this lack of advancement hit him square in the face while interviewing a young man for an intern position. The candidate was working retail at a local GameStop and the CIO was interviewing him as a favor to a client. After several meetings and discussions, the candidate was offered the position. He proceeded to turn down the opportunity because he didn't see any opportunity. There was one CIO and he had visions of having that position

someday. To meet that goal, he would have to wait until the CIO was gone. Without a

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you can invest in them, create an infectious culture and engage them in such a way that they won't want to leave. Or invest in them and accept the risk that they will leave and go somewhere else. Doing so will create goodwill that when they come across top talent and don't have a spot for them, they could potentially send them your way. There is also the possibility that the grass won't be greener on the other side and they'll come back.

You'll notice that regardless of the choice, you need to invest in them. Whether they stay or leave, you need to focus on career development for them. Investment isn't just about compensation and training. It's about putting in the work to develop a career path for non-Accounting professionals and helping them progress in their career.

Many worry that they'll invest time and money in developing someone only to have them leave. While not ideal, this is much better than the alternative of not investing in them and they stick around forever.

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