#### **CPA**

### Practice **Advisor**

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Jim Boomer • Feb. 17, 2017



Accountability is a simple concept – do what you say you'll do. Yet we often lack the discipline to hold ourselves accountable. As we flip the calendar to a new year, I challenge you to increase accountability in 2017. It will positively impact results and eliminate any surprises when you look back at what you've accomplished at year-end. If you follow a simple process of think, write and share, you will be amazed at how many of your goals you will achieve.

## Think, write and share

One reason our goals fall by the wayside is that we often just think about them. We

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next level. Tell someone what you want to accomplish. It's more devastating to let someone else down than to let yourself down.

## Group accountability

To get everyone in the firm headed in the same direction, you must reach to a consensus on the most beneficial direction for the firm. The best way to do this is to conduct a strategic planning session. Unfortunately, too many firms operate without a current strategic plan to provide a roadmap to the firm's success.

If your firm's strategic plan is out of date or doesn't exist, start the New Year by committing to developing or updating it. Define and document the core values, vision and mission statement and strategic objectives for 2017. What initiatives will support those objectives? Setting due dates and assigning responsibility can help ensure accountability. Then be sure to communicate the plan throughout the organization. Everyone on your team needs to be aware of the firm's direction.

# Individual accountability

Once the strategic direction of the firm is set and documented, it's time to develop individual game plans. Team members should map out projects that will contribute to the achievement of the firm's objectives. This step reinforces the importance of sharing the firm's strategic plan with the whole team. When the strategic plan isn't shared or the firm doesn't have a strategic plan you simply end up with a bunch of rugged individualists.

We recommend 90-day game plans. This time frame provides an opportunity for people to sharpen their focus on a quarterly basis. These regular accountability reviews are an important time to not only plan ahead but also to look back at results. These should be done at all levels of the firm – including partners. The tone starts at

the top and if leadership isn't willing to participate, you'll never get buy-in from the

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behavior. Why not harness the power of peer pressure to make us more effective in our professional lives?

#### Write it down

Assuming you have written down your goals for 2017, take out your list and add a few items.

- 1. Develop a strategic plan for your firm and communicate the plan to everyone in the firm.
- 2. Document personal goals aligned with the strategic plan and share them with others.
- 3. Join a peer group that will help you learn and will hold you accountable.

If your goals are still just floating around in your head, write them down. Then start telling others about the great things you plan to achieve in 2017.

Jim Boomer is the CEO of Boomer Consulting, Inc., director of the Boomer Technology  $Circles^{TM}$  and an expert on managing technology within an accounting firm. He also serves as a strategic planning and technology consultant and firm adviser in the areas of performance and risk management.

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