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current organization. Those goals probably include delivering outstanding client service by creating profit for your clients and yourself; the usual win/win.

Michael Wherry • Jun. 19, 2018

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I am a big sports nut and I drive my family crazy applying lessons learned from sports to greater questions in life. My son is working towards a spot on the varsity football team this fall. He has always been a quarterback, but recently that path has become cloudy. Is he the top quarterback? If not, should he focus on another position?

Recently the head coach told him, “If you show that you can practice like a varsity

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If you’re like most firms, this path is not clear. You have people that are really good at getting work done, and you have some that are really good at getting work in the door. Do you know if the work they are currently bringing in the door is work that fits the direction your firm is heading? Do the people doing the work understand the ultimate goal that they need to reach to accomplish the firm’s strategic objectives?

Recently it became clear to me that all firms need a quarterback. A quarterback is someone who can see the whole field; they can anticipate where all the moving pieces are going and execute the play to ensure the team scores. The quarterback gets a lot of the praise when things are going well, but they also bear the brunt of things when they are not going well. To be successful, your firm also needs a playbook. This playbook is the agreed upon strategy and vision for how your team (your firm) will be successful. Having the right playbook will help your team give the quarterback the right level of support.

If we dive a little deeper, we actually need to prepare two playbooks. This is where the pressure is on your leadership team to recognize this. Firms are facing a big choice in the profession today. Are we going to focus on what we currently do and not pay attention to the world changing around us? Or, are we going to dive straight into the deep end and transform today into the organization our clients will need in the future? Those both sound kind of scary at first glance.

But, is this really an “or” question? Why can’t it be an “and” question? Let’s try creating two playbooks: one that allows us to perform in the now and one that sets us up to transform for the future. The best of both!

Technology is changing the CPA profession. We can’t stop it. Is your firm all-in with technology or are they waiting for the next big thing? To choose to be all-in, you

must constantly test new things, learn, adjust and start the process all over again.

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- Continuous improvement/continuous learning

When focusing on client-defined value, you will start to see that you are required to sync the best process with the best technology for the specific needs of your clients. Because technology is always changing, we need to embrace continuous learning to hit the mark on client value consistently. We refer to this convergence of Process and Technology as Pro-Tech. Gone are the days when you could focus on process or technology as separate things. Both need to change at a consistent pace to remain profitable. This focus will also lead you down the path that the current business model must change to keep up. No longer is the chargeable hour relevant as a business model. The timesheet and the chargeable hour require more discussion than this piece allows. But here is a way to skip right over that problem.

Focus the second playbook on the future firm. The firm where technology handles all the transactional and compliance work of your organization. Remember you can't change the path of technology; you can only adapt. Do you want to wait and have your future defined for you or do you want to take control (like my son has) in playing multiple spots in practice to define your own future? I am so proud of my son by the way! But as for your second playbook and your firm's Quarterback – start with a vision of the future you're trying to move toward. The world is too complex not to have a vision. Without vision, you will fall back on status-quo. Status-quo will not allow you to define your future.

The second step needed to define your firm's future is to create the plays the quarterback will run. Here is the key point: *you* get to create your own game. You define your future. Focus your game on things that technology can't do. Technology will make the impossible, possible. Do your clients want technology to do it all? Can technology provide context to a given situation? What about emotions like empathy and empowerment; do we want a "bot" to provide those or another human?

The needs of your current firm are different than those of your future firm. Do you

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