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**By Jasen Stine and Marty French.**

In the tax and accounting profession, it's natural for us to focus on the concrete – the numbers, the client emails and calls, the compliance forms, etc. What may be less natural to some is making soft skills just as important. The mindset and culture at your firm have as much impact as your client relationships, and better culture can

lead to even happier clients. Below you can read about some of the key areas in which

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and driving successful planning toward your ideal future state.

As a leader within your firm, sit down and think about your vision for the future of your business. What type of clients will you serve? What kind of work will you do? Where do you most want to grow your business? For additional input, send a survey to other leaders in your firm and your loyal clients. Ask them what services are most helpful and important, what keeps them up at night, and what areas of their business and/or financials they struggle with the most. Use these self-questions and outside insights to inform what service areas have the potential to drive revenue and to grow your business into the firm you want to be in 5, 10 and more years.

Once you have identified your strengths, key revenue drivers, and have a clear vision of where you want to take your business, you can begin to set a plan to bridge the gap between where you are now and where you want to be. Develop a plan and set specific goals to meet, and continue to ask questions along the way.

## **Hire for culture fit**

In addition to a vision and plan for the business side, a mindset focused on hiring the right people is critical. While, yes, having the prerequisites for the job are important, hiring for culture and attitude should be weighted equally. There's a point when skills can be taught, but an open mindset, cultural fit, positive attitude and desire to make an impact can't.

Ask yourself: are the people I'm hiring going to be open to and excited about the future of the business? Will they want to help create a better future for our firm? Looking for employees who want to do more than punch numbers can not only improve firm morale, but will also help you meet your business goals and ensure clients are set up for success. And don't forget to keep diversity top of mind. Different backgrounds and perspectives help the firm stretch thinking and solve problems in new and unique, but effective, ways.

By hiring the right people and investing in them, you create better morale, higher

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Organizational structure is a critical consideration. Is your firm siloed into different groups? Are people with different skills and expertise working together on one client? Consider creating teams across specialties to give your clients more insights, and perhaps uncover opportunities they had not seen before. This nimble structure will also allow you to grow the business in ways you may not have before.

Mindset matters. Whether it's focusing on revenue and business planning, enhancing culture or rethinking business structure, being open to change will allow your firm to reach new goals and success.

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Jasen Stine is a Tax & Accounting Education Leader at Intuit. Marty French is an Accountant Strategy & Business Development Coach at Intuit.

Firm Management

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