

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Oct. 31, 2022



You're overworked. Burned out. From tax season to extension season. From extension season to tax season. That's the rhythm of many public accountants. For firms who have multiple employees, having a Director of Operations is a valuable role that can take time and pressure off the shoulders of owners and/or partners.

However, one thing many firms don't think through when they hire a Director of Operations is the most important, most pivotal question of all:

What do I want to do with my firm? What's my endgame?

Hiring a Director of Operations feels like a logical step to offload some of the key

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

systems and processes to make your firm run smoothly and your clients happy.

You can and should have someone who is capable and motivated to fill this role. But, that's table stakes. Your endgame matters, and here's why.

If your long term goal is more along the lines of status quo with less of your time required to manage the day to day needs of your business, having a Director of Operations is a good option. If you aren't building or scaling or trying to transform to a more advisory services focused business, hiring a Director of Operations makes sense.

On the other hand...

Think of a whole new level of a Director of Operations, and you have The JULIE™ role. This is where your endgame comes in. Do you want to grow your advisory and consulting business? Do you want to be stuck in the rhythm of tax season that seems to be turning many away from public accounting? Do you want to empower your team to be client facing advisors...so that...*wait for it*...you can go on a vacation and actually disconnect? Do you want your business to be able to run without you?

Instead of hiring someone who checks the basic boxes as a Director of Operations, The JULIE™ role takes the entire firm to a new level with exponential growth results. This role will ultimately leave you with time and opportunity to breathe and enjoy a more balanced life as an owner/partner.

To be very clear, The JULIE™ role is a sophisticated executive leadership role who is invested in the vision for the firm.

If you already have a Director of Operations or a Practice Manager – whatever the title in your firm- that person can be trained to excel in the role of The JULIE™.

Provided they have the right character traits that are in alignment with the core

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

change may involve re-defining roles in the firm, re-writing a compensation structure to drive specific behaviors, empowering team members to build and share processes, and creating an environment that rewards the sharing of technical knowledge. Most importantly, The JULIE™ empowers everyone on the team to make decisions- and make mistakes.

For all milestones achieved and mistakes made, The JULIE™ delivers all credit to the team and accepts responsibility for mistakes. This role also ensures that no weaknesses of anyone on the team are exposed to anyone outside of the team- including clients.

Getting back to 'the why'

In order to execute change...to really persevere and achieve results...The JULIE™ is not a 'yes' person. Rather, the role of The JULIE™ thinks through everything with 'the why' in mind and isn't afraid to professionally ask others to explain their thoughts or direction.

The JULIE™ also surrounds herself or himself with people who are not afraid to question things in earnest when there is a lack of understanding or something feels misaligned with the firm's overall vision. It's important to point out that the purpose of asking 'why' is to continue to move the firm forward toward 90-day, 1-year, and 3-year goals without getting off track. This prevents many detours down rabbit holes that can cost time and opportunity.

None of us develop or get better at life or our professional roles by surrounding ourselves with people who simply agree with everything we say. The JULIE™ can identify the difference between noise and priorities, and he or she has the acumen to 'know your audience' and how to communicate with that audience. Speaking to someone who communicates in numbers is very different from having a

conversation with someone who has an administrative or sales background, for

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us



Julie Smith is practice manager at [Harper & Company](#), a full-service accounting and advisory firm in Columbus, Ohio. She was named Innovative Practitioner of the Year in 2021 for CPA.com, received the Thomson Reuters Luca Award in 2021, and has spoken nationally to thousands of CPAs in 2021 and 2022 about how to execute change, build positive culture, and grow advisory services exponentially.

Firm Management

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved