



ConvergenceCoaching, LLC **Solve Your Capacity Challenges** **with Non-Traditional Hires**

"Everything that can be invented has been invented."

This quote is often attributed to Charles H. Duell, the Commissioner of US patent office in 1899. We know this to be far from that truth and that new inventions are happening all the time and at a faster pace than ever. Just look at our cars, our cell phones, the medical industry with robotics and devices being used to save lives, artificial intelligence, and the list goes on. **Yet, in accounting firms, we seem to stay stuck in the same structure and talent roles that have existed for decades – probably longer – instead of inventing new ones.**

There is a conversation happening in the profession about adding advisory roles, such as data analysts, research specialists, engineers, wealth managers, HR consultants and more. **However, what is not being considered that could make a huge difference NOW in firm capacity and talent shortages is creating new roles and redesigning the service delivery process to provide for more non-CPAs involved in current service delivery process.**

Let's face it, there are a lot of tasks and responsibilities in the delivery of traditional compliance services that simply do not require a CPA to do the work. *What would happen if we strip the non-CPA work out of audit, tax and accounting and moved it downstream to lower-rate-per-hour and more-available personnel?*

One objection that I hear from firm leaders is that they have to protect the CPA brand and they pride themselves that their firm has CPAs delivering client services. **This CPA snobbery actually hurts the CPA brand** by asking \$80k a year people to do tasks that a \$40k a year, non-licensed individual could do. That's because those higher-paid accounting graduates don't speak highly of prep work, binder set up and more. They aren't excited by it and it might be inhibiting their "stay factor" at the firm.

And, it's hurting your profit with lower leverage and realization and impacts client service because most firms are short-staffed and are struggling to meet client deadlines (without a Herculean effort by your CPAs who then get burned out – by that particular busy season and, ultimately, burned out of the profession altogether).

So, how can we shift this mindset and think about staffing and addressing the capacity challenge differently? **Invent new roles that haven't existed previously!** You can do so immediately by:

- **Carefully mapping your service delivery process.** Review what steps go into your compliance engagements and evaluate your current job descriptions in tax, audit, client accounting or other service areas. Pull out the tasks or responsibilities that could be done by someone who is not a CPA. Since your senior and manager CPAs are closest to the process, have them review the service delivery process and job descriptions to identify those responsibilities that could move to another role.
- **Creating a new role or roles based on those responsibilities.** This could be a "Tax Support" or "Audit Support" role or "Transaction Specialist" – these roles are not created yet, so they are not on most organizational charts or job description templates from the AICPA or other CPA associations. You can categorize them and name them what you would like!
- **Integrating the new role into the team that they are supporting.** Please do not create a separate group or even department for them. Don't call them admin – they are part of the client-facing service delivery process. Don't call them "para" -- doing so creates division or a feeling of being "less than."



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The people in these roles need to be treated and seen as meaningful revenue producers, part of the client service team and included in team meetings, engagement kick-off meetings, and training.

- **OF COURSE, making these roles revenue producers.** They are NOT non-billable admin! Their role is critical to client engagement and delivery. And, they are crucial to the overall client experience of your firm. They should be assigned a standard rate and have a revenue goal (or billable hour goal if you haven't moved away from time-based measures yet).

Inventing these new roles will elevate the morale – and respect – of your team because you are thinking outside the box and trying something new to solve what has been cast as an unsolvable or hopeless. They will see you trying to help them and provide relief while being smart and focusing people on their highest and best use.

Don't go into spring busy season without piloting at least one new role! **You can define, recruit and train someone for this new position before busy season starts.**