

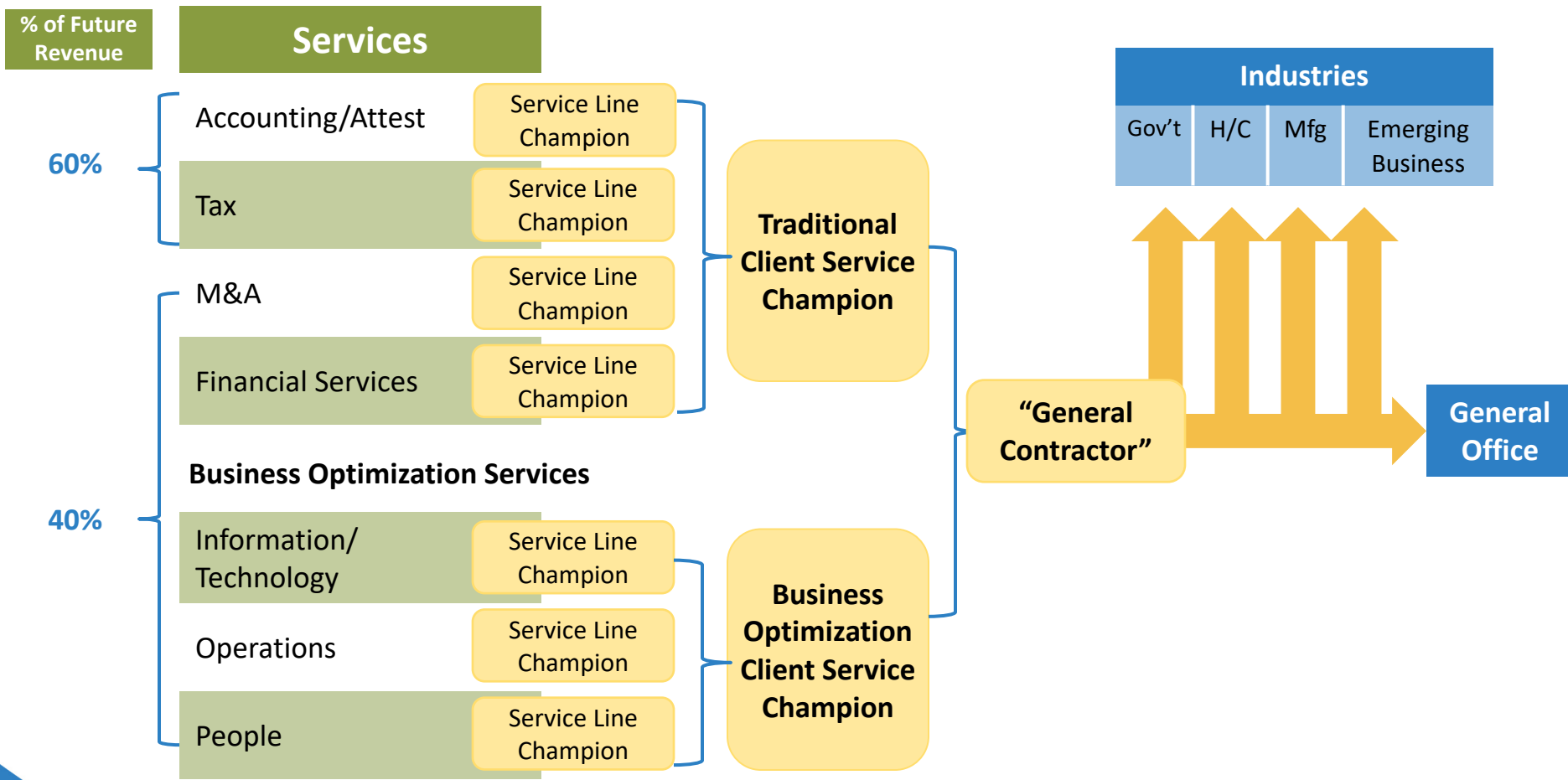
Key Concept Slide...

The Integrated Full-Service Team Approach

Greg Barber, CPA

September, 2019

Integrated Full-Service Team Approach



Key Take-Aways

- ▶ The best clients today are looking for accounting, tax, industry and non-traditional service (Information, Operations & People) expertise from their CPA firm
- ▶ They expect their relationship leader to be a “general contractor” of all services from their CPA firm
- ▶ Strong majority of CPA firm partners are... at best... accounting and tax “subcontractors”
- ▶ Many different skill-sets needed in order to be a great “general contractor” of full-service client relationships
- ▶ Much work needed to teach, coach & train people to become great “general contractors” of CPA firm full-service client relationships