



## OVERVIEW

Presented by Terry Snyder, President & CEO

Susan Rhodes, VP Member Relations

# Our Mission

- To remain independent
- To be profitable
- To foster continuous improvement

***Since our founding in 1969, we've established a solid reputation for fostering our members' growth and prosperity.***

# Meet the Board



**John Griesbeck**  
Reynolds, Bone & Griesbeck, PLC  
*Memphis, TN*



**Ron Jackson**

Saltmarsh, Cleaveland & Gund  
*Pensacola, FL*



**Clint Pugh**

Saville, Dodgen & Company, PLLC  
*Saville, Dallas, TX*



**Alan Sobel**

Sobel & Co., LLC  
*Livingston, NJ*



**George Virtue**

Young Parkyn McNab LLP  
*Lethbridge, Alberta*



**Scott Williams**

Gilliam Coble & Moser  
*Burlington, NC*



**Monica Zumo**

Hannis T. Bourgeois, LLP  
*Baton Rouge, LA*

# Our President and CEO



Terry Snyder

- Experienced in public accounting and private industry
- President of the Commerce Bank in Champaign, IL
- Managing Partner, Clifton Gunderson, Downstate IL
- Regional Managing Partner, Olive LLP, Indianapolis, IN
- Partner-in-charge, RSM McGladrey, Raleigh, NC
- Executive VP and COO,  
American Hardware and Software Distributors
- Partner, RSM McGladrey, Raleigh, NC
- Senior Accountant, Arthur Andersen

# Meet the Allinial Global Team

Jack Charlesworth



COO & Executive  
Vice President

Sherry Bartman



Information  
Services

Tanya Christensen



Finances  
& Controller

Rosa Chun



Marketing  
Services

Job Dieleman



International  
Business

Karen Jenkins



Meeting Services

Debbie Kuhl



Member  
Engagement

JoAnn Labbie



Professional Development

Susan Rhodes



HR & Member Relations

Steve Varley



Technical  
Services

Lara Joseph



International  
Relations

# Allinial Global Key Areas

## Global Resources & Tools

### People

- Human Resources
- Learning & Development

*(Succession Planning / Retention and Recruiting Tools)*  
*(Growth Academics / Work Groups / Leadership Training / Soft skill Training)*

### Growth

- Communities of Practice
- Marketing Resources

*(Marketing/ Niche Technical Support/ Niche Based Training)*  
*(Training / Newsletters / Toolkits / Conferences)*

### Client Service

- International Resources
- Technical Support

*(Commerce/ Quality/ Connectivity / Certifications / Networking)*  
*(Expertise Portal / KnowledgeConnect / IFRS support / training)*

### Firm Management

- Information Technology
- Firm Management

*(Current Developments / Q&A assistance/Networking)*  
*(Benchmarking / Roundtables)*



# People - Human Resources

*As a member, you have access to a world class proprietary HR Model. We offer cornerstones to build your firm and Advance to the Next Level.*

## Selection/Recruitment

- Guide to using Behavior Based selection techniques

## Career Development

- PACE “Performance and Career Excellence”
- Guide to Linking Pay & Promotion to Performance
- Succession Handbook Managing Your People Pipeline

## Retention

- RETAIN©

# People - Human Resources

## Succession - Partners In Transition



✓ *Designed specifically for Allinial Global around two key components*

- *Firm Succession*
- *Individual Transition*

*Develop a “roadmap” in terms of moving to a next or new career or even retirement*

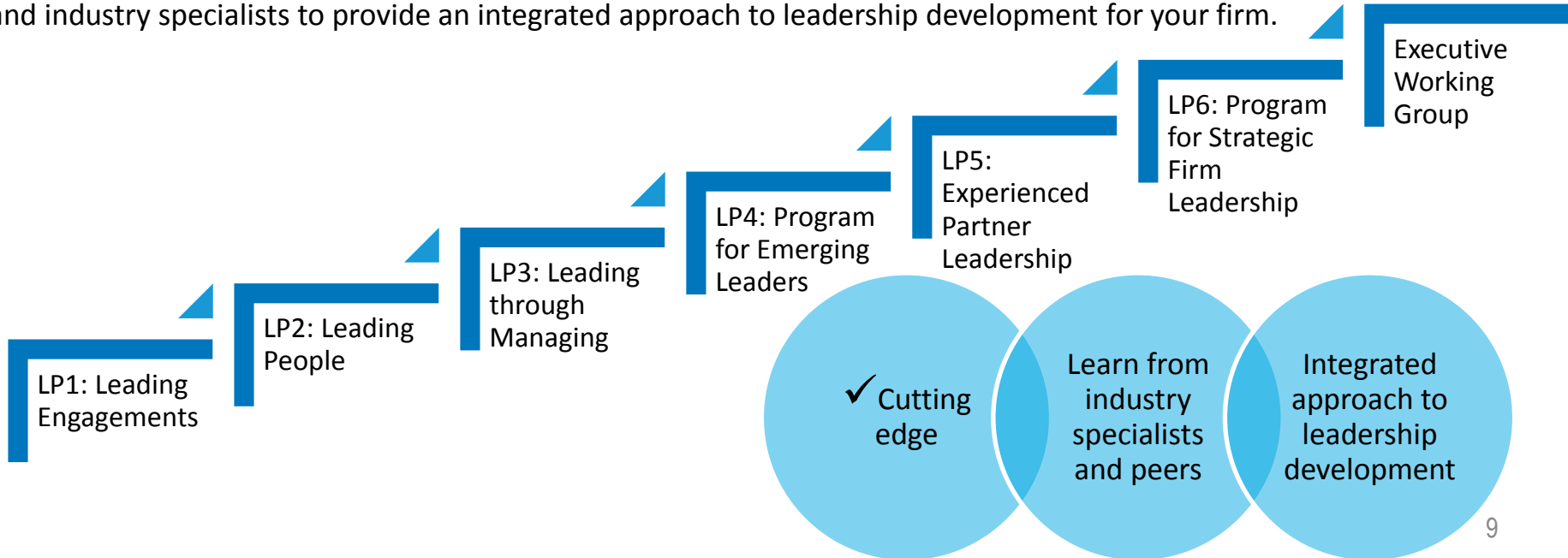




# People - Learning & Development

## Leadership Development Series

Allinial Global's Leadership Progression (LP) is a series of learning opportunities sequenced to provide cutting-edge leadership and management skills training. These programs bring together a variety of trainers, consultants, counselors, and industry specialists to provide an integrated approach to leadership development for your firm.





# Growth - Communities of Practice

## Niche Development

### What is a Community?

- Helps firms develop and/or grow their niche practices
- Gain knowledge, enhance skills, increase expertise and connect to a broader base of professionals in a specific area
- Share (or develop) marketing and technical resources
- Collaborate with fellow Allinial Global members to win proposals and engagements

### Benefit of Belonging to a Community:

- Networking & sharing best practices
- Take an existing practice to the next level
- Invest in a specific niche
- Expand your service offerings and capabilities
- Resource Matrix (marketing, help desk, technical resource)

# Growth - Communities of Practice

## Current Communities

- Business Valuation/Litigation Services
- Construction Contractors
- Corporate Finance
- Dealerships
- Dental Services
- Employee Benefit Plans
- Family Business Consulting
- Financial Institutions
- Fraud & Forensics
- Governmental/Public Sector
- Healthcare
- High-Tech/Biotech
- Hospitality
- Insolvency
- Insurance
- International Business Development
- International Tax
- Manufacturing & Distribution
- Not for Profit
- Oil & Gas/Natural Resources
- Peer Review
- Public Companies
- R&E Tax Credits
- Real Estate Development
- Risk Advisory Services
- SALT
- Sports & Entertainment
- Tax Strategies
- Transfer Pricing
- U.S. Agribusiness
- Wealth Management

# Growth - Communities of Practice

## Functional Communities

- Marketing
- Human Resources
- Technology
- Firm Administrators
- Chief Operating Officers
- Women in Accounting
- Young Professionals
- Business Development
- Recruiting



# Growth – Marketing Resources

## Marketing & Business Development

### Member Marketing Orientations

- For Marketing/BD Professionals new to that role
- For new Allinial Global Member Firms

### Publications and Content

- Newsletters (print and electronic) – original content
- Newsletter Articles Library (articles from past newsletters)
- Master Tax Guides (Private label)
- Estate Planning Guides (Private label)
- Alerts – Tax, Legislative and Benefits
- Ghost-written articles
- Whitepapers
- Webinars

# Client Services – International Resources

## International Team

**Job Dieleman**  
Regional Director,  
Americas



**Lara Joseph**  
Assistant Vice President  
International Member  
Relations



**Graeme Blockley**  
Regional Director,  
Asia Pacific



**Ed Rivera**  
Regional Director,  
Latin America



# Client Services- International Resources

## International Tax Certification

### **Program Description:**

This is a 13 month program provided by the IBFD in collaboration with Allinial Global for tax professionals wishing to become a certified expert in this field. Participants must achieve the required standards to receive the certification.

### **Target Audience:**

Manager and Partners

# Client Services- International Resources

## Clearing House - Arraydian

- Provides both destination and specialization solutions
- Futuristic – not limited to our members but available for “partnering”
- Niches have to be qualified by select criteria
- Ready to operate





# Client Services- International

Allinial Global GO

## Allinial Global International Secondment Program

- The ability to temporarily employ individuals of Allinial Global firms to other Allinial Global firms globally.
- Recruiting tool





# Client Service – Technical Support

## Web-based Resources

### **KnowledgeConnect**

- Comprehensive knowledge management system
- Connects you to entire membership
  - Services
  - Communities
  - Internal Resources
- Member Resource Guide

### **EY Client Portal**

Members can access E&Y's resources of information, knowledge, experience and people. News, reports, alerts and analysis address evolving business issues. It contains interpretive guidance, checklists and publications on a wide range of business issues.

# Client Service – Technical Support

## Web-based Resources

### **Expertise Portal**

Electronic tool to seek solutions to complex issues from the member firms' top "experts". With this tool, members will be able to bill and/or pay for the resolution.

### **ProfitCents (SageWorks)**

A web-based tool that takes financial data and quickly converts it into plain language reports complete with industry comparisons, ratio analysis, trend analysis and even expectations.

### **First Research (Hoovers)**

The leading provider of market analysis tools that help sales and marketing teams perform faster and smarter, open doors and close more deals. By synthesizing hundreds of sources into an easy to digest format, you can understand a prospect's or client's business issues. First Research can benefit any organization that has prospects in multiple industries.



# Firm Management – Information Technology

## Leveraging Technology



### Detailed IT Survey

With ratings of technology purchases, usage, and trends by fellow members



### Vendor and product

Specific roundtables and knowledge-sharing communities



### Best practices

Sharing via monthly Firm Technologists' conference calls and online community



### Fly-ins

Featuring timely topics and peer-to-peer learning



# Firm Management - Operations

## Financial / HR Survey

- Comprehensive annual survey of member firms
  - Revenue/Expense Information
  - Time Analysis
  - Performance Metrics
  - Partner Income Analysis
  - A variety of operational information
- Summary and Detail Data
- Quartile Data
- General Policies
- Compensation
- Benefits
- PD/Training
- Evaluations
- Recruiting
- Personnel Turnover for Professional Staff

## **Periodic NIPP Survey**

# Affinity Group



## Allinial Global Affinity Purchasing Program

- Dental & Health Insurance – Lloyd Pro Group
- Professional Liability Insurance – NAPLIA

## Allinial Global Member Discounts Include:

- AICPA Conferences – 15%
- AT&T Mobility – 10%
- Audit Analytics
- Becker CPE Courses/CPE Review – 15%
- CCH Publications – 20%
- Gleim Publication – 20%
- QuickFinder Handbooks – 10%
- Surgent – 15%
- Thomsom Reuters – 15%

*For a complete listing of discounts, visit [allinialglobal.com](http://allinialglobal.com)*



**GOOD ... GETTING BETTER ...  
BECOMING THE BEST!**