



# Steve Erickson

National Consultant to CPA Firms

**The value of your practice can be greatly improved when you focus your efforts to balance these 5 key areas.**

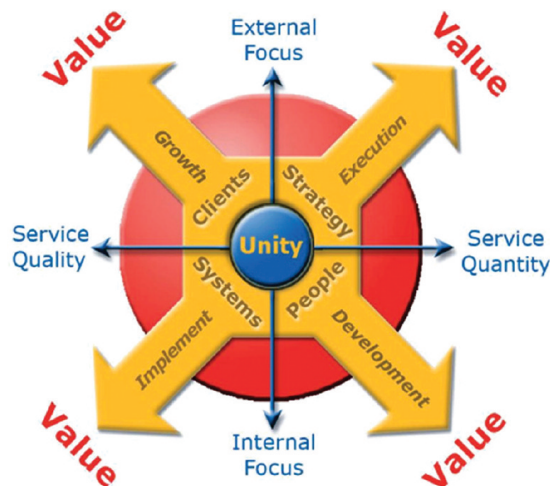
How does your firm measure up with the examples below?

## CLIENTS

- We evaluate our clients at least annually.
- We have formal client acceptance process.
- Our clients readily pay our fees.
- Most of our clients are very profitable.
- We focus on clients in growing industries.

## STRATEGY

- I know where our firm is going.
- Planning takes place on a regular basis.
- Our strategy is agreed to by all owners.
- Our services support our strategy.
- We ask our clients to evaluate our service.



© Steve Erickson LLC

## UNITY

- There is a high degree of trust in the firm.
- People do what they say they are going to do.
- All owners are on the same page.
- We hold people accountable.
- Our firm is very profitable.

## SYSTEMS

- Our audit and tax processes are efficient.
- We use technology on every engagement.
- We prepare budgets for all work.
- All systems and processes are documented.
- Everyone supports our systems and processes.

## PEOPLE

- Everyone understands our compensation system.
- Evaluations are timely.
- Turnover is not a problem.
- We have enough experienced personnel.
- Everyone knows our succession plan.

Together we can solve problems, foster trust among your people and add value to your firm.

**Let's get started. Contact me today.**

**505-331-9100**

Steve@SteveEricksonLLC.com • www.SteveEricksonLLC.com