

# Building competitive advantage in your market.

## We are passionate for what's next!

We are eager to tackle tomorrow's challenges and opportunities. Capitalize on the success that got you where you are today and embrace new solutions to succeed in the future.



## Coaching

- " **Coaching Calls:** Quarterly calls with your primary client server to benchmark progress on goals and other practice management needs throughout your membership. The schedule provides you with accountability for the changes you want to make at your firm.
- " **Orientation:** On-site session at start-up to cover all the resources available to all your personnel. Determine first-year Implementation goals and action plan
- " **Coaching Day:** Once every two years, an Aprio team member will visit your firm to help you navigate a challenge or issue that will allow you to achieve what's next.

## Tools

### Financial:

- " **Financial Statistics Survey:** MAP survey developed by our team and provided to member firms. This is utilized to provide peer to peer benchmarking.
- " The NIPP (Net Income Per Partner) Calculator. Thirteen month rolling NIPP calculation members use to measure their partner compensation trends on a monthly basis. This is used to allow the member firm to compare current results to their own past results.

### Human Resources:

- " Biennial Talent Engagement (People) Survey.
- " MemberBest Practices: Shared policies and practices of member firms
- " Collection of Aprio policies, forms, career development profiles and resources, performance management system
- " Vendor discounts, including Becker CPA Exam Review
- " Articles from various news sources related to the HR function

### Marketing:

- " Checkpoint Marketing for Firms electronic newsletter.
- " Marketing Toolkits developed by our internal marketing personnel.



### Did you know?

You can save \$1,500+ per employee on CPE? Lifelong learning opportunities without CPE cost barriers.

Contact **Mike Max** to learn how **Aprio Firm Alliance** can benefit your CPA firm



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Aprio Firm  
Alliance

## Alliance Member Benefits

- " **CPE:** Members have access to our entire Becker group live and self-study catalog and Aprio produced live events
- " AICPA/CPA.com FANs discount - extra 20% on courses and 15% on conferences
- " Quarterly lead administrator group coaching calls led by former small firm Director of Operations
- " Financial Benchmarking (Financial Statistics Survey)
- " Retirement/Partner Comp/Succession surveys
- " **Practice Management:** Services delivered by our team to members. **Broad categories include:**
- " Strategic Planning / Retreat Facilitation
- " M&A Assistance
- " Partner / Owner services
- " Functional area consulting (A&A, Tax, CAS)
- " Talent Management
- " Profitability improvement

**Marketplace:** Vendor discounts that utilize the leverage of Aprio's buying power or other specific organizations that fit our member's needs, including Becker CPA Exam Review.

**Member Referral Program:** Financial incentive (or practice management coaching day) to refer us to other firms.

**Electronic Tools Database:** Survey of all software / platforms members are using to be a referral source when considering a change.

## Additional

- " Annual Leadership Conference with roundtable formats focused on practice management issues. One registration included each year.
- " **Peer Group Video Conferences:** Insights and best practice sharing on timely practice management and industry issues.
- " Member Desk Support Team - live people to act as a concierge in assisting your firm to answer questions and access resources.
- " Proactive and timely offerings for webinars and brunch & learn sessions that bring new ideas and resources to your team.