



Helping Organizations Define and Develop Top Talent

Behind the scene's at Christensen & Drake LLP, What's needed to be a top CPA firm today

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Nestled in the Santa Ynez Mountains in quiet Solvang, is one of the largest accounting firms in Santa Barbara County for the past 40 years. Christensen & Drake LLP is a Certified Public Accountant and Advisors firm with a reputation for quality service.

Christensen & Drake offers a full menu of traditional services, such as accounting (including financial statements, audits, reviews, compilation, bookkeeping and personal services), estate planning, professional specialties (including advisory and consulting, business valuations and litigation support), and of course taxes. What I have found to be unique about this firm is their attitude towards accounting. They consider themselves to be excellent "bean counters ... but view accounting not as a science, but an art. We take tremendous pride in our creative approach to problem solving in all the services we offer."

Christensen & Drake works with a wide variety of businesses, ranging from manufacturing, retailing, wholesale and distribution, to the hospitality industry. However, it's the location on California's Central Coast that has given them the opportunity to develop significant expertise in several industries, such as: agriculture and farming, ranching, wineries and vineyards, as well as real estate and construction. The firm believes "it's the relationships that have given us the specialized knowledge and expertise that go into making our clients' businesses a success and their dreams a reality." The staff believes "that building trust with their clients comes down to more than just the nuts and bolts of executing the job of a CPA. It takes a mix of intangible qualities that we've developed over the years, which we pride ourselves on each and every day."

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Let's meet the staff, which the firm believes is their greatest resource because ultimately the business of accounting is founded on the exchange between accountant and the client. When discussing this aspect of running a cutting edge CPA firm, Kathleen Campbell, Partner, said this:

“One of the things we have learned over the past three years has been that the traditional hierarchical organization isn't appropriate for a firm of our size. Our employees want a variety of quality work that continues to challenge them. Rigid organizational systems don't usually allow for the cross training of many different projects, and don't allow us to use our resources as different deadlines and large blocks of projects need to be completed. In addition, a firm of our size doesn't have so much work in a specialty area that certain staff can be devoted solely to that type of work and be kept busy on a full time basis.

We have found that we need a flexible organization to handle changing roles, schedules and cross training. When we do this, the staff person has a well rounded training that allows them to move into client management with a good set of fundamental basic knowledge, along with the specialties they develop over time.

Tammy has chaired our staff development committee this year and they have accomplished a lot. We have revised the evaluation forms to emphasize past accomplishments and goals and to set new goals. This is resulting in individualized career path planning for each staff member set to their career goals.

At the evaluation period in December we asked each professional staff person if they wanted a formalized job description, and none did. They preferred the approach of setting short and long term goals that develop and enhance their best characteristics and talents. That includes the assignment of certain administrative duties as technical staff careers develop. Not all our managers will perform the same duties – we work to find the ones in which they can contribute their best talents matching their current schedules and goals.”

The team consists of four partners: Debi Gioia is the Managing Partner, Kathleen Campbell leads the Estate and Trust Planning Team, Verva Enoch heads the

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Tax & Business Valuation group, and Tammy Vogsland is the newest partner of the firm with emphasis in Staff Development.

The staff consists of 22 talented members and two managers that lead the professional staff. Steve Palmer's specialties are taxation, retirement planning and non-profit organizations. Carlene Jones also specializes in taxation, estate and trust planning which includes wills, living trusts, and charitable remainder.

There are two tiers of Professional Staff. The senior staff has extensive specialty knowledge and general broad knowledge. The staff accountants handle basic taxation and accounting. They also have the opportunity to develop specialty areas.

The administrative team consists of a firm administrator who handles Human Resources and business management, a Network Administrator who handles the hardware and software, as well as the network for the computer systems. An office manager handles general office systems, scheduling, and firm projects. Other administration personnel handle clerical and technical tasks.

My work with Christensen & Drake has spanned over four years, and Well-Run Concepts has studied what it takes for top performance in a CPA firm today. Here are some of the things we have learned by analyzing the Behaviors (how they do the job), Attitude & Values (explain why they are motivated and for what rewards), Attributes (can they do the job is personal skills or competencies). Using validated and scientific assessment tools such as the Trimetrix™ System we can predict if individuals will do the job needed to perform up to the highest of standards.

Here are a few of the behaviors needed:

- Organized workplace
- Analysis of data
- Customer oriented

The rewards or culture needed:

- Traditional

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- Theoretical
- Utilitarian

The attributes needed:

- Self management
- Continuous learning
- Planning and organizing
- Problem solving
- Results orientation
- Self Starting
- Flexibility
- Personal accountability

From benchmarking the job and understanding “if the job could talk ... what would it tell us is needed for superior performance.” Then we match the talent to the job. The key and what sets Christensen & Drake apart from many CPA firms, is they understand the job first and then find the right people to do that job very well. The firm’s continued commitment to these types of organizational development processes and talent management solutions is one of the reasons the firm is so successful.

If you would like to join the team at Christensen & Drake, please visit their website at www.cdllp.com. They have the following positions currently available this tax season:

- Tax Accountant
- Senior Tax Accountant
- Per Diem Tax Accountant

I hope you have enjoyed this issue of “Behind the Scenes,” a look into a local Santa Barbara County CPA firm and what is needed for top performance in this financial industry today.

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