



Somerset CPAs Striking a Proper Balance

By Charlee Beasor

To help employees relax during non-peak periods, Somerset CPAs provides a range of fun activities such as the annual Somerset Challenge.

Patrick Early is a realist. He’s under no illusion that public accounting is an “8 to 5 job.” “This is a hard profession,” admits the Somerset CPAs president. “The key to being successful in this type of business is you have to retain people. When people have to work hard and lots of hours – and that’s just the reality of public accounting – you’ve got to make it so they enjoy being here.”

Somerset CPAs has been named to the Best Places to Work in Indiana list every year but one – 2009 was busier than most and Early acknowledges the company missed the application deadline.

“We look at some of that other stuff (different industries) and it’s easy to make some of that stuff fun and easy. This is public accounting. For us to do as well as we do (on the list), that means a lot to us,” Early reflects.



‘Write your own ticket here’

Early was employee No. 16 when he joined the firm in 1979. Today, he oversees a staff of about 160.

“The way we look at it, if you’re in an organization that is growing and creating new opportunities all the time, it’s a lot easier for people to have true advancement. They’re not just being called something different (with a new job title), they’re doing more complex things and having more opportunity to succeed,” Early says. “They just don’t want to do better financially, they want to be successful.”

Internal employee referrals are only one testament to the firm’s culture, says human resources manager Donna Butler.

“A lot of our top performers come from friends who are working here and loving it, and they have friends who are at CPA firms,” she asserts. “They come here and I think they love the things that attracted me and a lot of other people: We are entrepreneurial and don’t have one-size-fits-all (philosophies).”

“That lets them drive their career and develop it in the best way they can. We may have to give guidance, but it’s almost like you can write your own ticket here. If there’s something you really have a passion for, the principals encourage that. They never stop you from doing that.”

Supervisor Abby Shorter, who joined the company nearly a year ago, recalls that feeling from her interview.

“When I interviewed, they asked, ‘What do I want to do?’ instead of how could I fit this

mold. It showed me they cared about what I want,” she recalls.

Taxing times

For any public accounting firm, there are peak periods throughout the year – tax time being the most obvious. Employees work longer hours and travel during the week to and from client locations and put in office hours on the weekends.

“You are asked to do so much,” explains Sean Rizer, assurance practice manager. “This is great (that) they’re asking more of me, for career advancement. But they’re making sure not to overload us – there is really good balance.”

One of the most important pieces of the company culture, adds Early, is that employees come first, especially during busy seasons.

“If we burn people out, it doesn’t do us any good. You need that longevity to build that relationship that you need with clients,” he maintains. “It does us no good to bring people in, work their tails off for three or four years and then they’re so burnt out they want to get out of here.”

Butler mentions that all employees are encouraged to use vacation time and can earn extra time during peak periods. Financial goals are also much lower during non-peak periods to help with balance.

Assurance services manager Kim Dollin sees the firm’s partners working hard alongside the rest of the employees.

“The partners do the same thing – the partners are actively involved; they are role models,” she describes. “There is no ‘I’ in team; we interact on a daily basis and it helps that other people are going through it. There is a support system.”

A family-like atmosphere is one of Gene Zoellner’s favorite parts of being at Somerset.

“There are people who work here that I consider good friends of mine,” the assurance team supervisor offers. “These are tough jobs; it helps to have good friends going through it with you.”

Rizer agrees: “If you need a break, someone will take five or 10 minutes out of their day to talk about things unrelated to work. Everybody needs that, to just forget about work for a while.”

Developing the talent

Early observes that introverted personalities traditionally were attracted to the profession – even though today, the accounting world involves client contact and is more than just crunching numbers.

“But if you have people that perhaps aren’t as outgoing when they’re coming out of school, you want to get their confidence built quickly. (We’re) putting people in positions where they have an opportunity to lead and an opportunity to be in charge,” he contends.

To build confidence and cultivate skills, younger employees are assigned leadership-type roles at staff meetings and during team-building events.

Joe Paulson, senior on the tax team, also appreciates everyone being on equal footing.

“Pat, from day one, said, ‘Nobody is better than anybody here.’ That’s important, that ‘I’ve been there too’ (feeling). There’s a perspective of understanding,” he notes.

Somersetland

Butler and Early realized that when employees only had yearly goals to attain, it was easy to fall behind. To encourage weekly objective-setting and completion, they came up with a board game called Somersetland.

“The farther they advance the more credit they get – as long as they achieve the minimum. You have people that might be falling behind in their goals, but instead of giving up, every week is a new week,” Early explains.

It’s popular with employees, especially because all winnings have to be taken in prizes (kitchen décor, musical instruments, patio furniture) – not money.

“Half of my house is furnished by Somersetland,” Rizer admits. “We’re accountants, so we’re tight with money by nature.”

Employees can suggest their own additions to the prize catalog.

“You can say, ‘This is what I want or need.’ It’s a luxury; the options are almost endless,” Shorter comments. “And you know where you stand (with your goals).”



Somerset CPAs celebrated 50 years in business in 2011, but the firm has some clients that go back 75 years as the company evolved from another organization.

Comes back to clients

“A lot of the benefits are used to keep people motivated, but the biggest thing is helping our clients in the best possible way,” Zoellner contends.

Somerset leaders say the company differentiates itself by having personal contact with clients and developing long-standing relationships.

“We have to help people other than just filling out forms for them or providing them with the things that are the compliance parts of accounting,” Early states. “We do that and we do it really well, but the point is we have to build relationships and understand what people are trying to accomplish and where they’re going. You don’t do that without your people being good listeners, communicators, being observant, becoming good business people.”

Employees appreciate being able to get to know clients and build those relationships.

Paulson summarizes: “The culture that is set here comes out with how we represent people – and the clients see that. What differentiates us is that we get to know you. That’s what we’re doing in the office and what I think it’s all about.”