



Ohio Chapter Meeting

Friday, February 16, 2018

Ohio Society of Certified Public Accountants
Columbus, Ohio

The following members were in attendance:

Tammy Boring	Snyder & Company	Lancaster, Ohio
Sarah Galley	Pohlman & Talmadge	Dayton, Ohio
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Rita Keller	Keller Advisors, LLC	Beavercreek, Ohio
Lori Ellinger	Kirsch CPA Group, LLC	Oxford, Ohio
Diane Glover	Kirsch CPA Group, LLC	Fairfield, Ohio
Dan Lewis	Lewis Professional Liability	Worthington, Ohio
Amber McAuliffe	OSCPA	Columbus, Ohio
Vic Christopher	Snyder & Company	Lancaster, Ohio
Beverly Rench	Thorn, Lewis & Duncan	Dayton, Ohio
Jen Zarins	Tidwell Group	Columbus, Ohio
Kim Tanner	Whitcomb & Hess, Inc.	Ashland, Ohio
Jenny Plummer	Whitcomb & Hess, Inc.	Ashland, Ohio
Kathy Pool	Rudler, PSC	Bridgeport, WV
Denise Ison-Miller	OSCPA	Columbus, Ohio
Sarah Sanders	Rudler, PSC	Fort Wright, KY
Guy Gage	Partners Coach	Bridgeport, WV
Tim Bub	Newman & Company	Cleveland, Ohio

Presentation

Katie Tolin “Managing Your Offerings: Innovation Drives New Revenue”

If you would like a copy of Katie’s presentation, please contact Sarah Galley.

Business Meeting

Leisha Rospert, Ohio Chapter President, opened the business meeting.

The minutes from the September meeting as posted on the website were approved. If you have any changes, contact Michelle Holmes, Chapter Secretary.

Tammy Boring, Chapter Treasurer reviewed the treasurer's report and it was approved as submitted.

Sarah Galley, Chapter Program Chair, reviewed the upcoming meeting dates and other tentative program topics for 2018.

Leisha Rospert reminded the chapter of the CPAFMA National Conference for 2018 in partnership with AICPA Engage and the scholarship opportunity for a 1st time attendee of National. Leisha announced all scholarship applications must be received by April 23, 2018.

2018 CPA Firm Management Association's National Practice Management Conference in
partnership with AICPA ENGAGE

June 11 - 14, 2018

Las Vegas, Nevada

Kathy Poole, 2017 National Scholarship Winner, provided an update regarding her experience at the conference.

Roundtable discussion of these topics:

- 1) File Security – What are people doing with their paper client files?
- 2) Status quo- Why do people settle for status quo in firms?
- 3) Social Media - Who is responsible for Social Media posting in the firm?
- 4) Technology Budget- What % of revenue is your technology costs.
- 5) Presentation of Tax Returns- Who still uses the nice folders? How else are you packaging?
- 6) Vacation Policy – How do you grant PTO is it seniority, first come, first serve?
- 7) Remote Workers- How do you handle PT/seasonal employees and working remote along with email on phone to ensure you are following all FLSA standards?
- 8) Secure Communications – How are you sending electronic communications securely?
- 9) PTO- Do most of your employees use all of their PTO?
- 10) Practice CS and Ultra Tax- Which do you use to maintain your database?
- 11) CPE Tracking – Is there a centralized procedure or process used for tracking CPE for professionals.
- 12) Payment Tools- How are clients paying you besides by credit card or check?
- 13) Internal Communication- How much and what do you share with your employees in regards to financial numbers, decision making etc..
- 14) Evaluations – What software are firms using for performance evaluations?
- 15) New Hire Onboarding – What companies are firms using to streamline the new hire onboarding process?