

Crosley+Company

Summary of Services

“Gale has helped us formulate a comprehensive growth plan. But just as importantly, she has led us step-by-step and held us accountable. The results have been impressive.”
Tim Michel, President, Rea & Associates

Assessments and Practice Growth Plan Development

Determining what direction a firm should take with practice growth often begins with an assessment of the firm in growing the revenue stream. The objectives are to develop an understanding of the history of past investments and determine what areas need attention to efficiently develop the firm. It identifies potential areas of opportunity, obstacles to growth, and natural resources the firm can leverage. It gives you a preview of the most likely areas of potential. It culminates in the development of a comprehensive Practice Growth Plan; a roadmap highlighting specific implementation recommendations tailored for the uniqueness of your firm's culture.

Workshops

Workshops are designed to transfer knowledge and skills in an environment of optimal learning complete with lectures, exercises and case studies. The objectives are to give attendees a comprehensive experience in the subject matter and enable them to practice new concepts and skills for growing the revenue of the firm.

Speaking and Strategic Planning Facilitation

Gale Crosley speaks regularly to groups of CPAs for associations, the AICPA, state societies, and for firm retreats. She also facilitates firm strategic planning sessions. There are over a dozen topics in her repertoire.

Large Opportunity Coaching

When a firm has a single large opportunity, this offering enables the team to achieve the highest odds for success. It includes a just-in-time workshop to transfer large opportunity skills, as well as ongoing support over the course of the opportunity.

Business Development Coaching

Coaching for individual CPAs or small groups is designed to assess current levels of expertise, structure an approach, and enhance opportunity development and closure skills. This is accomplished through a series of sessions and assignments designed to interweave concepts and practices in a live marketplace environment.

Successfully Hiring and Integrating a Business Developer

Integrating a business developer into the firm is a significant challenge for most CPA firms. This consulting service offering gives you the highest odds for success by matching the right skill set, assessing final candidates, and crafting the appropriate job description, compensation plan and achievement milestones.

Building a Niche

Starting with a Niche Assessment and Planning Workshop, this offering features ongoing meetings with niche teams to assess the niche strategy, recommending approaches to attacking the niche, and coaching the niche team through activities to either get the niche off the ground, or increase the growth in the niche.

Ongoing Support

Our ongoing support option assists firms in implementing practice growth initiatives. This includes getting initiatives off the ground, establishing effective practice growth processes, working with assigned leaders to identify roadblocks and solutions, designing practice growth position descriptions, interviewing candidates, recalibrating strategy with firm leaders, and a host of other support activities.

