



# ***Charting Our Own Course!***

**Hahn and Houle Chartered Accountants**

## ***Vision Report***

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## ***Charting Our Own Course!***

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## ***Charting Our Own Course!***

### **INTRODUCTION**

#### **Context and Scope**

In January and February of 2011, the partners and staff of Hahn and Houle engaged in strategic visioning for the firm featuring two facilitated workshops. The process was designed, facilitated and reported upon by Scott Ferguson of *Progress Consulting™*.

This is the report on the primary outcome – *Vision 2016*.

#### **What is “Visioning”?**

To the partners and staff of Hahn & Houle, “Visioning” means:

- *Imagining our firm’s future based on what we have achieved to date*
- *Planning how to make our Vision pull us forward*
- *Setting the stage for growing the firm, which helps us grow as individuals*
- *Being transparent about where the firm is heading*
- *Having a common destination by which we can measure and celebrate our progress and success.*

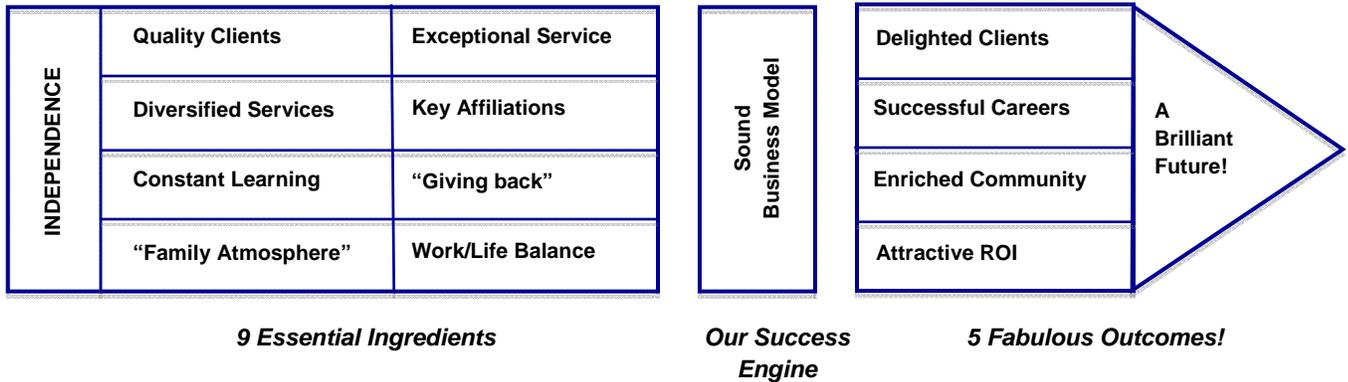
#### **How is Visioning important to us at this time?**

Partners and staff believe that a clear and compelling Vision:

- *Helps us, on an ongoing basis, understand how far we’ve come and where we want to go*
- *Facilitates co-operation, co-ordinated effort and teamwork to pull in a common direction*
- *Expands our capacity to enhance our individual abilities and to grow our firm*
- *As we grow, enables us to clarify and agree on expectations, processes and procedures*
- *Helps us to differentiate ourselves from other firms*
- *Inspires innovation and an innovative firm is more likely to succeed and flourish, and*
- *Attracts the high quality professionals we seek to join in our pursuit of our exciting Vision.*

**Charting Our Own Course!**

**VISION 2016!**



**9 ESSENTIAL INGREDIENTS**

**First and Foremost, *Independence***

We are, have always been and will continue to be an independent firm of chartered accountants. Independence makes us creative and nimble. It allows us to create our own culture – the culture that we believe fosters success – and to chart our own course. We are independently minded, entrepreneurial accounting professionals and we want our firm reflect these qualities. That’s the history of our firm, its present and its future. By 2016, we expect to be a firm of 4 partners – 40 partners and staff in total – in a single location – and proudly independent.

**Quality Clients**

We want clients who seek, recognize and appreciate the exceptional value that outstanding chartered accountants provide. We are motivated by the challenges they bring, reassured by their ethics, inspired by their vision and energy and professionally rewarded by the mutually beneficial relationship we share. We realize that clients who lack these qualities are distracting from servicing those who do. Accordingly, we will build a firm of high quality clients.

**Exceptional Service**

We will reward high quality clients with exceptional service. We will be proactive and creative in developing novel new ways to delight them. Clients will appreciate us for the value we bring. And to capitalize on that value, our clients will involve us early in their business conversations.

**Diversified Services**

We will offer a broad range of diversified services that will be rare among firms our size, to include:

- Accounting
- Business Advisory

- Taxation
- Valuations
- Forensic Accounting
- Mergers & Acquisitions.

### **Key Affiliations**

We will provide diversified services by achieving an ideal mix of internal expertise and affiliations with other professionals who share our entrepreneurship, our passion for excellence our infectious energy and our supportive culture. We will deepen our relationship with the education community, particularly the University of Alberta.

### **Constant Learning**

A key element of *growing our firm* is *growing our people*. To grow as individuals and professionals, we will be challenged and constantly learning through formal education and professional development, our commitment to continuous mentoring and by tackling a large volume of challenging work. As each of us grows, we lift one another and our firm together.

### **“Giving Back”**

“To whom much is given, much is expected”. We are gifted professionals who benefit from exceptional opportunities. We return our good fortune by giving back to our community. It’s the right thing to do. And it is deeply rewarding.

### **“Family Atmosphere”**

Our firm has a strong tradition of “a family atmosphere”. We have fun! We look forward to coming to work. Our atmosphere is one of the key benefits of independence. It is a powerful motivator to remain independent and a quality that we will zealously protect, preserve and nurture as we grow. It creates a pleasant office atmosphere where people want to be. It fosters strong teamwork and mutual support that encourages and contributes to continuous learning. And it makes us attractive to the high quality future colleagues we want to recruit.

### **Work/Life Balance**

Another advantage of independence – *charting our own course* – is to pursue work/life balance. We can “break the mould” of overworked and overworking accountants by working hard on client service during regular hours, taking our time off and attending to internal firm projects during slower periods, putting in overtime where necessary, not as a way of life and, overall, achieve a “work hard/play hard” lifestyle that pays us well and delivers an enviable return on investment.

## **OUR SUCCESS ENGINE**

### **Sound Business Model**

We will adopt a sound business model that will be our engine for personal, professional and financial success. It will generate effective, efficient processes to continuously enhance the quality and timeliness of our service, reduce wasted effort and cumbersome processes and accelerate our professional learning. It blends agreed-upon roles and responsibilities for every level within the firm, targeted chargeable and non-chargeable activities and hours, billing rates that reflect high quality work, time for professional learning and community giving and competitive salaries to generate a very attractive rate of return for the firm’s future partners.

## **5 FABULOUS OUTCOMES!**

### **Delighted Clients**

We want our clients to be absolutely delighted with the work we do, the value we provide and our contribution to their success. We want to be “the talk of the town” – the pride of our clients. We share a Vision of enthusiastic clients who become the champions of our superb reputation. That’s a lot to earn. And we are more than up to the challenge.

### **Successful Careers**

Our firm will be the breeding ground of successful careers that are characterized by high ethical standards, exceptional technical skill, vast experience, superb business-oriented value-added service, high quality of worklife and a craving for continuous learning and development.

### **Enriched Community**

We will enrich the business community through the impact of our exceptional professional services, our profession through our expertise, professionalism, and high standards and our neighbourhoods by “giving back”.

### **Attractive ROI**

We want to attract and grow outstanding future partners. Our sound business model will realize our Vision while generating an ROI that will attract the superb future partners that we seek and that our high quality clients and staff deserve.

### **A Brilliant Future!**

The result? A firm whose future is “brilliant” in every sense of the word – dazzling, prominent, smart, wise and clearly set apart. Is that the future you want? Have you got the qualities to help create it? Have you got the energy and determination to make it happen? If so, you are the person we are looking for. Come grow with us.