

One Firm's New Game Plan: Biz Dev and Client Service Teams

Kirkland Albrecht & Fredrickson battles a bruising recession.

by Rick Telberg

By the time you read this, Ken Kirkland will be packing for a trip to the India beach resort of Thiruvananthapuram as the newly named international chairman of the JHI accounting firms network.

As a leader of the 120-firm, 55-nation group, Kirkland hopes to help build stronger programs, increase participation and attract new members. "As companies like ours want to stay independent," he says, "it's important to be affiliated with a group like JHI to access additional resources and opportunities."



Ken Kirkland

While that job sounds formidable, it pales in comparison to the challenges Kirkland faces as the chief executive of Braintree, Mass.-based seven-partner, 58-staffer CPA firm Kirkland Albrecht & Fredrickson that is battling back from a bruising recession.

Many in the profession may know the firm better as the force behind XCM-automated workflow solutions (a CPA2Biz ally) and Xpitax tax-prep outsourcing. But back at the firm, branded as KAF Group, Kirkland is working to rebound from painful layoffs last year and a week-long unpaid furlough for remaining staff.

"Recessions are a time to look inward and ask how we can improve," he says. So the firm went back to the basics of the accounting business with two initiatives, one focusing on client satisfaction and the other on acquiring new clients.

Initiative 1: Ramping Up Biz Dev

Even while cutting other expenses, Kirkland doubled down on sales and marketing. In 2009, he hired a public relations agency in 2009 and changed the firm's chief marketing officer, the well-respected Becky Dowd, into the firm's chief practice development officer. It's not a new role for Dowd; she already had experience in sales with ADP, the Bank of Boston and commercial real estate. In addition, each partner accepted new responsibilities for new business development.

Now, on the last Tuesday of every month, from 8 a.m. to 6 p.m., Kirkland meets with one niche team after another. They separate prospects into hot, warm and cold categories, create and follow up on action items, probe cross-selling opportunities and fill in marketing-activity calendars for the next month with lunches, dinners, speaking engagements, golf outings and client trade association meetings. "It's all about accountability," Kirkland says.

Initiative 2: Surround the Client

In the other key initiative, Kirkland is creating client-service teams to, as much as possible, he says, “surround” the client with service and attentiveness. Each team is headed by a “client-relationship executive,” which, to most CPAs, translates as “engagement partner.” But, where previously KAF’s formal client-service program may have ended there, under the “total quality service” program, Kirkland has added the practice development officer, senior managers, administrators and specialists. “The client should feel they’re getting touched in so many ways,” Kirkland says.

To track the firm’s new revenue goals, Kirkland has borrowed an idea from church fund-raisers: the oversized thermometer with the rising red line to show progress from Sunday to Sunday. “It started as a joke,” Kirkland says. “But it’s a serious thing.”

How’s it all working? Last year, the firm’s revenue declined — for the first time in a very long time. This year, revenues are running six percent ahead of last year’s.

But it takes years to change a firm’s culture as fundamentally as Kirkland hopes. And only new clients are being added to the “total quality service” program as they join the firm. Furthermore, Kirkland doesn’t expect the Boston-area economy to show signs of new life for another 18 months to 24 months, especially in the firm’s sizeable construction niche. “So ask me in two years how we’re doing,” he says. “I won’t be sure until then.”

In the meantime, KAF will be working hard for every client dollar.