BerganKDV has a strong foundation for growth.

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Cori Power
HR Director, BerganKDV
BerganKDV merges technical skills with career and leadership development

With roots that extend back to the 1940s, BerganKDV knows how to maintain strong, long-term growth. A 2015 merger between Bergan Paulsen, KDV and Networking Solutions expanded the firm’s service portfolio, as well as its regional footprint which currently includes nine locations across four Midwest states.

In addition to tax and accounting services, BerganKDV now offers professional services for business planning and technology solutions, including workforce management and wealth management. The firm’s growth plan and merger activity paid off, with Accounting Today naming BerganKDV as a Top 100 Firm and Regional Leader in 2019.

According to Cori Power, HR Director at BerganKDV, having a strong learning and development program in place for its larger population of 400+ employees is key to thriving in a learning-centric culture where change is a constant.

Guided by a strategic vision to ensure employees are ready to grow with the firm, Power created a new, three-pronged approach to employee training that also boosts its recruiting potential.

“Over the last two years, we’ve devoted our time to creating an all-encompassing learning and development program,” Power says. “While technical learning has always been ingrained in our culture, we now concentrate on long-term career planning and leadership development, as well,” she continues. “This expanded focus, helps us keep on top of changing regulations, while recruiting new talent and retaining the talent we have on board.”

The executive-level support she receives is critical to the success of BerganKDV’s new learning approach. “When our CEO talks to our leadership team and shareholders, he’s very supportive in making sure we’re looking at career and leadership development, not just technical development,” Power says. “They understand that, without a great team of people, we’re not going to serve our clients the way that we should. So, taking care of employees is truly important to them.”

“"We’ve made so much progress toward creating a more learning-oriented culture, not just in how we can gain more technical knowledge, but how we become better leaders who can go out and really wow the clients with the work we do.”

Cori Power
HR Director, BerganKDV
When it came to the technical skill sets needed for its tax and accounting staff to stay in tune with ongoing changes, BerganKDV looked to its learning partner, the AICPA. “As a professional service firm, we don’t sell widgets, we sell knowledge,” Power says. “So, it’s imperative that our teams are ready to provide our clients with the most up-to-date knowledge they need to run their business better.”

Consistency was also a priority, especially given the high post-merger business growth in the firm’s state and local tax planning area.

“We already had the majority of our team members taking CPE courses from the AICPA, but not all,” Power explains. “We knew the AICPA would ensure our CPE education would be consistent, valuable and very ingrained into the expertise we need to serve clients. Based on our experience, we knew the quality of education, as well as the budgeting, would also be consistent for us. When I presented all this to decision-makers, their decision to go with the AICPA was easy.”

Training began with AICPA instructor-led courses at a central BerganKDV office, cutting down on travel costs. Employees from all other offices participated via video conference. Currently, nearly all the firm’s 200 tax and audit employees have completed AICPA courses, including Audit Staff Essentials and Tax Staff Essentials.

“Any regulatory updates in the last 12 months are incorporated into the AICPA training each year,” Power says. “As a result, our team members are now getting the most recent tax and audit information and explaining the changes to clients, before they start tax planning in December and before they actually start doing returns in January and February. Having the AICPA program in place is proof to our clients that we educate our team members using the highest level of expertise available.”
Ensuring compliance without the workload

Tracking and certifying the training progress of hundreds of employees can be a time-consuming and laborious process, but not for BerganKDV. AICPA’s proprietary compliance tracker works seamlessly with the firm’s LMS, allowing BerganKDV to track training activity and CPE hours.

“One of the reasons we chose AICPA training was the CPE tracking capability,” Power says, noting the system’s ability to track the varying requirements of the different jurisdictions and credentials. “We can see in real time how many hours each employee has taken per year, where they’re coming up short and where they need more hours. CPE completion certificates are also automatically generated for us and loaded into an individual’s profile.”

“We were doing this manually before and it was incredibly time-consuming,” Power continues. “The compliance tracking system saves us at least 40 hours of labor a year.” The efficiency gains and savings will only grow as the firm expands its use of the system’s compliance reporting feature and, according to Power, this is something BerganKDV’s executives and shareholders see a lot of value in.

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Boosting recruitment and retention

According to Power, AICPA learning programs also increase the firm’s recruiting and retention strength at a time when college students are being sought after as early as their sophomore year. In fact, information about the firm’s training programs is one of the most popular requests from recruits. Low unemployment rates add to the competitive pressure as firms vie to win new recruits and retain existing staff.

“New hires and team members with only 2–3 years of experience typically worry about how they’re going to hit the required 120 hours of training within three years,” says Power. “With our training program, it’s all planned out for them, which is a big weight off their shoulders. They can also be confident that the CPE courses they take are high-quality courses because they come from the AICPA.”
Championing career and leadership development

As part of its three-pronged approach to training, Power is championing the cause to intensify efforts around career planning and leadership development. This is part of a growing trend among companies who want to do more than satisfy employees but engage them instead.

“We talk about engagement a lot with our teams, and we do an annual engagement survey,” Power says. “A common question we get as a result is, ‘What’s the difference between engagement and employee satisfaction?’ When I think about engagement, it’s really about the passion our teams bring to their jobs: the extent to which employees feel passionate about their jobs, are committed to the organization and put discretionary effort into their work.”

To encourage this high level of engagement, the firm’s aim is to have a long-term career plan in place for 80% of team members in the current fiscal year. “We see this as a win-win for both the firm and team members,” says Power. “With more knowledge about their career plans, we can provide them with the tools, training and guidance they need to support them.

“We can also make sure our firm is setting a strategic vision to ensure growth. If we have several team members interested and knowledgeable in an area of expertise, we need to make sure we’re prepared, and that we’re looking at it as a potential offering for the firm.”

An employee mentor program is also part of the firm’s career and leadership development program and is key to succession planning. Like others in the industry, BerganKDV has partners reaching retirement age. By pairing partners with an employee showing a strong interest and aptitude in a particular field, they can transfer knowledge about clients and their relationships with the firm to prepare for the transition.

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Leading the way

Power reflects on the lessons learned as she laid the foundation for BerganKDV’s redesigned program. “Through this experience, I saw just how much is out there for CPE training, and the options are completely endless. So, you really must be knowledgeable about what you want to offer your team members, and make sure it’s the right fit for your firm,” she says, noting the help the AICPA brought to this process.

“Although the AICPA is a large organization, the people you work with there make you feel like it’s not. They didn’t just hand us a program, they’re very flexible and willing to tailor it to fit exactly what we needed. Our AICPA team has been nothing short of amazing.”

Having such a comprehensive employee development program also increases the potential for future merger opportunities. “Part of why Bergan Paulsen looked like an attractive merger candidate to KDV is that we already had talent development initiatives in place, beyond just a technical aspect,” says Power, adding that merger candidates are typically being courted by multiple firms. “BerganKDV’s robust learning and development program could really help another firm move forward.”

With two years into its new learning and development program, Power sums up its impact. “We’ve made so much progress toward creating a more learning-centric culture, not just in how we can gain more technical knowledge, but how we become better leaders for our team members and our clients. Ultimately, it’s about developing and empowering leaders within BerganKDV so they can go out and deliver a ‘wow’ client experience through the work we do.”
About BerganKDV

BerganKDV is a leading professional services firm with a contagious culture, where growth is fostered and making a difference means something. Powered by people who do business the Midwest way, BerganKDV delivers comprehensive business, financial and technology solutions, including business planning and consulting tax, assurance and accounting, technology, wealth management, and turnaround management services.

In addition to naming BerganKDV as a Top 100 Firm and Regional Leader in 2019, Accounting Today also named BerganKDV Wealth Management, LLC as the 27th-largest wealth management firm, ranked by assets under management.
Continuing Professional Education from the AICPA

AICPA and CIMA offer learning and development programs for finance and accounting professionals. With over 650,000 members and students in 179 countries, we monitor industry trends and create or update over 1,000 competency-based learning resources each year. Let our learning team design a customized plan to ensure you are investing in the right areas.

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- Excel workshops to increase staff productivity
- Blockchain, cybersecurity and robotic process automation
- Leadership and communication

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