



Learning to Grow

Investments in training
pay off for Weaver

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engaging great talent.”

— Laura Roman, CPA
Partner-in-Charge
Tax Education Weaver



A strategy for standing out

For accounting firms today, competition to attract and retain high-quality employees is fierce. Weaver is obviously doing something right: It is ranked No. 39 on *Accounting Today's* list of 100 largest U.S. firms and has been repeatedly included on *INSIDE Public Accounting's* "Best of the Best" list.

This Texas-based company attracts clients nationwide with its deep expertise in industries such as oil and gas, financial services, manufacturing and government. To attract, recruit and earn the loyalty of employees, Weaver leverages its extensive professional development programs and provides training that may give Weaver an edge on the competition.

"We've always had a strong belief and investment in training," says Shonda Tucker, Weaver's training and development manager. "Our intent is to hire interns and move them up the ladder, progressing to the partner level. Training, development and advancement opportunities are all factors that keep them engaged."

In 2010, Weaver began using AICPA Tax Staff Essentials — a move driven by changes in tax laws, the market's mounting competitive pressures and the firm's own rapid growth.

"We had a pretty aggressive growth strategy in place, so we wanted to ensure people were getting the professional and career development they needed to provide the best service to our clients," Tucker explains.

"And we didn't want to worry about creating training content every year, or whether it was the right content. When we evaluated the AICPA's course materials and saw how thorough they were, we were confident that they would help us provide our people with the skills and knowledge they needed."

What started as training for associates in a few offices has expanded today into firmwide learning opportunities for everyone — interns to the most experienced staff.

Learning for all levels

Weaver employees take part in a progressive, five-level development model.

"It's a steppingstone approach to learning that starts with the basics and progresses to intermediate, then advanced levels," explains Laura Roman, CPA, partner at Weaver, who works jointly with Tucker on the program. "It lets our staff know their professional development pathway and lets managers know their staff will be trained consistently."

The first level includes company-specific training for new hires. The remaining levels roughly correspond to the AICPA Tax Staff Essentials curriculum.

In addition to a PowerPoint presentation for instructors, AICPA materials include supplemental information such as case studies and references. Using AICPA resources gives internal instructors more time to focus on their core business.

"We can depend on the AICPA to provide us with very thorough, high-quality content," Roman confirms.

"We don't have anyone on staff who is a certified content developer or an instructional designer, so having access to that expertise from the AICPA is very helpful. If we ask our partners to create content, they're not serving our clients, and that's where their time needs to be focused."

Weaver Tax Education Model

Level 1: An introduction for interns and new hires covering topics such as office culture, software and time tracking

Level 2: Basic information about individual tax returns, partnerships and corporations

Level 3: An intermediate program that goes deeper into tax topics

Level 4: Advanced curriculum that covers international, state and local tax issues

Level 5: A top-level course for senior employees or managers that focuses on business tax services or private client services

In addition to technical skills, each level includes soft skills.

A continuous learning culture

Partners and senior personnel teach the advanced courses using AICPA materials. For the lower-level classes, Weaver works with AICPA instructor Peter Bunce.

“Having someone like Peter completely focused on the fundamentals creates a dynamic dialog and a welcoming educational environment for everyone,” Tucker says. “At higher levels, we prefer to have our partners teach, because they are really passionate about instructing and facilitating. It also demonstrates to people in the room that our partners are approachable and accessible.”

Regardless of who is teaching, Weaver partners participate as facilitators to provide real-life examples of how lessons relate to the firm’s actual clients and business processes.

“The fact that partners make time to attend is another sign of how important learning is to Weaver’s culture,” adds Tucker.

The Tax Staff Essentials program also helps Weaver keep on top of constant change. “We know AICPA devotes resources to tracking changes and updating materials with new court cases or tax laws, and that gives us a high level of comfort,” Roman adds.

About Weaver

Founded in 1950, Weaver has more than 650 employees and offices in nine cities across the United States. In addition to traditional assurance and tax services, Weaver also provides international tax, state and local tax, and wealth strategies services as well as risk management, financial advisory, IT advisory, energy compliance and consulting, and forensics and litigation support services.

The firm was ranked among the “2017 Best of the Best Accounting Firms” by *INSIDE Public Accounting*, which recognizes firms that excel by achieving a delicate balance of focusing on culture, clients, team and financial results.

Weaver tracks the progress of its training programs in many ways, but one of the most impressive results can be seen in its recruitment success.

“Every person we interview wants to know about our training programs in order to evaluate us against other employers,” Roman explains. “Our commitment to professional development, combined with AICPA programs, has been a huge positive for us in recruiting great talent.”

“Among interns who have been in our offices and participated in Weaver training, more than 95% accept our offer.”

The education program benefits both individuals and the firm overall. “Our staff have the opportunity to grow their abilities and knowledge, while the firm has consistent training in each of our offices, so all locations can serve our clients consistently,” Roman says.

Tucker continues to work with different practice areas to ensure staff receives the right training opportunities.

“It’s a very collaborative approach,” she says. “I rely heavily on our partners to identify topics that need to be covered, both in technical knowledge and soft skills. Our learning committee helps guide both content and tone to match our core values and culture. We also gather input from partners to determine whether associates who have completed the level training are prepared once they’re on the job.”

Every year during performance evaluations, managers discuss training goals and responses with their employees, and the resulting feedback is wrapped into the next year’s planning, along with comments from participants at the end of each course. All of that data is considered when planning future courses and refining essential content for each course.

Weaver is working with the AICPA for assistance with the firm’s AA update, and SEC courses to support the firm’s audit services. Account executive Katrina Street is an important AICPA resource in this planning.

"If we ever need new materials or new topics addressed, the AICPA is certainly first in my mind, and Katrina, our account manager, is who I call. She is my single point of contact for whatever I need and is a dependable and knowledgeable resource for us," Tucker says.

Also noting the contributions of instructor Peter Bunce, she adds, "We have a high level of trust in Peter. With the tremendous feedback we've received about him, we've decided to involve him in our Level 4 training this year."

It's clear that a strong learning culture is embedded into Weaver, and Tucker offers other firms this advice:

"A learning culture needs to be driven from the top. Your staff need to see that your leaders care about their growth and development," she says. "That's why we always have a partner lead initiatives. It shows the staff that we are invested in them and want them to succeed. It benefits not only the people being trained but also the whole firm."

About Tax Staff Essentials

Beginner, intermediate or advanced, your tax staff are covered with the AICPA. Our comprehensive training builds skills for practitioners at every stage of their career. That means you can be confident in their ability to take on more challenges and responsibilities.

Build a Tax Staff Essentials system that fits your needs. Our mix-and-match options offer the most flexibility:

- **On-site at your firm** for 10+ participants using an AICPA instructor or your own
- **Self-study online** for individuals to learn at their own pace and location
- **AICPA Tax School** for learning in a classroom setting at several U.S. locations
- **Webcasts** offered on multiple dates and times throughout the year

For more information about the Tax Staff Essentials program, contact AICPAlearning@aicpa.org.



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