

Tax Leader Laboratory

While many opportunities exist for today's tax department, it faces significant threats and challenges, putting the most seasoned tax department leaders to the test. The cause of this current dynamic ranges from the commoditization of services to the increased demands of the consumer.

During the two-year program, the Tax Leader Lab will address the current challenges and provide insight into the pillars of TaxOptimization. Combined with the collective knowledge and sharing of experiences of an intimate group of peers and solidified by one-on-one coaching, the Tax Leader Lab is the premier program to elevate your skills and optimize your Tax Function Effectiveness.

As a participant in the Lab, you will:

- Avoid mistakes others have made
- Gain exposure to what's worked in other firms
- Collaborate and create unique solutions that truly differentiate your tax department

As a tax department leader, you can make a million dollar decision in five minutes of think-time, or spend fifty hours checking off tasks that don't make a difference.

The combination of insights, peer advisory, and individual coaching provided via the Lab, will allow you to capitalize on opportunities, minimize risks, and ultimately accelerate your competitive edge!

Foundation

CPA Edge developed TaxOptimization, an industry leading methodology covering five integrated operational aspects of an effective tax department surrounded by three supporting disciplines. This methodology serves as the foundation for the



Tax Leader Lab. As a participant in the program, you'll receive guided mentorship and insightful conversations on TaxOptimization that will forge your edge in a highly competitive industry.

Cadence

Lab members will participate in quarterly group sessions. The initial session will be in person, and subsequent sessions will alternate between Zoom and in-person. Zoom sessions will be limited to four hours to minimize Zoom fatigue.

Additionally, each member will engage in monthly one-on-one, 60-minute coaching sessions to help comprehend topics, discuss implementation issues, and other barriers to success.

Group Session Format

Each quarterly session will include*:

- Presentation/Education
 - Each session will begin with an overview of a topic, specific learning objectives, and actionable insight. Guest subject matter experts will support specific sessions via live feed or video interviews.
- Peer Discussion
 - The camaraderie and collective knowledge of a group of like-minded tax leaders will help uncover solutions and remove barriers while providing insight and inspiration. Likewise, the cognitive diversity stemming from leaders of differing firm size, geography, specialization, etc., will open new possibilities.

These positive attributes will unfold as we discuss the topic at hand, sharing our collective experiences, challenges, successes, and failures.

- Action Items and Accountability
 - A level of accountability is inherent in all peer group and coaching environments; however, each session's discussion will conclude by setting appropriate goals and action items and sharing them with the group.
- Summary and Overview of the Next Session

** In-person sessions will include adequate time for networking and relationship building.*

Lab Values

Each Lab will be limited to ten tax leaders. Care will be taken to minimize the degree of competition between member firms; however, it may be impossible to eliminate it. Accordingly, the following values are critical to the Lab's success:

- **Confidentiality** – We trust that what we share in the Lab stays in the Lab
- **Community** – We share a common goal of achieving a better experience for all stakeholders of our tax departments – Clients, employees, owners, and families
- **Collaboration** – We work together openly and share freely
- **Commitment** – We understand our role and participation is an integral part of the Lab
- **Creativity** – We go beyond sharing what's worked elsewhere and create solutions that differentiate our departments

Content Schedule

- **Session 1** – Overview and Supporting Disciplines; Leadership, Relationships, Culture
- **Session 2** – People and Human Capital
- **Session 3** – Process and Technology
- **Session 4** – Decommoditization and Differentiation
- **Session 5** – Transformational Services
- **Session 6** – Alternative Pricing Strategies
- **Session 7** – Marketing and Sales
- **Session 8** – Putting the Pieces Together

Tax Leader Laboratory Accelerator

This program is appropriate for those looking for exposure to the concepts of TaxOptimization in a condensed period. The Accelerator addresses the same content and utilizes the same session format and monthly coaching component. However, the Accelerator meets monthly over eight months, uses Zoom to deliver all sessions, and limits sessions to three hours to minimize Zoom fatigue.

Investment

The Tax Leader Lab investment is \$XX,000, payable quarterly throughout the eight-quarter course, with the first quarter due upon enrollment. A 15% discount is available if paid in full upon registration.

The Tax Leader Lab Accelerator investment is \$XX,000, payable monthly throughout the eight-month course, with the first month due upon enrollment. A 10% discount is available if paid in full upon registration.



Next Steps – Complete an application [here](#), book a Discovery call [here](#), or e-mail [here](#).

Meet Your Guide

Brian Amann is a coach and consultant. As the Founder of CPA Edge, he helps results-oriented CPAs and Firm leaders challenge industry norms, driving true vision and strategy, so they can differentiate, enhance client and employee loyalty, and, ultimately, profit more while working less.

As the leader of his former tax firm, TaxOps, Brian set ambitious service, quality, and growth goals for the benefit of clients, employees, and partners. He drove sixfold revenue growth over a four-year period when single-digit growth rates were the norm. It's a feat that landed the firm on the Inc. 5000 as one of the fastest-growing companies in the country and Brian on Accounting Today's Managing Partner Elite as a top firm leader. During the same period, TaxOps landed in the number one spot—two years in a row—on Accounting Today's Best Place to Work For.

Brian has been building world-class tax departments for decades with over twenty-five years of leadership experience with Ernst & Young, including an area leader role in their National Tax Office, and TaxOps. Spearheading recruiting, team development, workplace culture, and staff development initiatives, he recognizes specialized talents and sod skills that lead to higher levels of success. As a master strategist in differentiation, transformation, and pricing, Brian guides his clients to improve their effectiveness and performance.

Brian is a CPA, CGMA, and Certified Exit Planning Advisor (CEPA). He frequently speaks, writes, and consults on the business issues accountants' and their firms face. He enjoys helping others find their niche where they can meet or exceed personal and professional expectations in the industry.

