



Case Study:  
Briggs &  
Veselka Co.

Tax & Accounting

*CCH<sup>®</sup> Learning Solutions Help  
Briggs & Veselka Co. Succeed*

**Briggs & Veselka Co. is the eighth-largest accounting firm in Houston, Texas, specializing in tax, audit and business advisory services. Rated one of the “Top Places to Work” in 2012 by the *Houston Chronicle*, the firm’s management prides itself on developing top-notch professionals to serve clients.**

A decision was made to create a better learning program for employees and shareholders. The responsibility for planning and implementing the new program went to Catherine Loftis, the firm’s compliance manager. It’s her responsibility to ensure firm employees have the resources they need to meet accounting industry requirements and maintain their CPA licenses.

*“We track not only state requirements, but also AICPA requirements, making sure our employees are well-versed in their specific industry. Even if they aren’t CPAs, we’ve now put in place a firm requirement that emulates the state of Texas annual CPE requirements for CPAs. From first-year staff members to shareholders, we give them all the exact same CPE requirement — at least 40 hours per year.”*

— Catherine Loftis,  
Compliance Manager

Out of 164 employees, 73 are already CPAs. However, many of the firm’s employees are first, second and third-year professionals working toward their CPA license. Managers hope that all of these young professionals will earn their CPA credentials. Meeting the learning requirements now introduces a good habit of continuing education.

#### **How to build a successful firmwide education program**

To develop the new program, Loftis first studied Briggs & Veselka’s employees so she could tailor training to fit their needs. She decided to build a program that would provide a lot of flexibility and different content choices to empower professionals to select the educational opportunities of greatest interest for their specializations.

*“I think you have to look at your employees and their habits and try to determine what interests them — what will bring them to the table. They are going to attend training and CPE if they see the win-win relationship. We’re winning as an organization and they’re winning as individuals. If a firm can create that kind of environment, the training program should be successful.”*

Loftis developed several different learning plans according to the role and seniority of Briggs & Veselka's employees. Everyone is required to take a minimum of 40 hours of CPE, but how they achieve those hours varies according to the plan. For example, new staff members have mostly self-study and live webinars from Wolters Kluwer in their plan, while senior managers add more local webinars and industry conferences to the mix. Shareholders are expected to earn approximately 20 hours of their hours outside of the office, giving them more networking opportunities in the industry.

**Large catalog of self-study courses makes CPE available anytime, anywhere**

Every learning plan at Briggs & Veselka includes content from Wolters Kluwer. Loftis uses CCH® Learning Center and CCH® Webinars to deliver online training within the firm. In the CCH Learning Center, firm professionals gain access to over 300 technical and substantive online, self-study training courses to help increase proficiency in core topics and emerging issues — all while earning CPE credits.

*“Wolters Kluwer constantly updates topics for what’s important today, especially right now when the laws are changing rapidly. Wolters Kluwer knows what’s timely and relevant. This is the information our professionals need.”*

One reason Loftis selected Wolters Kluwer content is because, unlike previously-used training vendors who allowed their courses to become “a little stale” (some topics did not seem to get updated for several years), Wolters Kluwer enlists some of the best authors in the industry to keep content relevant as new information emerges.

*“With Wolters Kluwer, both the self-study and the live webinar topics are constantly updated and maintained to ensure the information is as accurate as it can be. That is very important, because the last thing we need is stale information getting to our professionals.”*

**Using CCH Learning Center and CCH Webinars, Briggs & Veselka was able to:**

- **Enable professionals to plan out their CPE requirements for the whole year, so they don't have to rush and cram everything into the last few months.**
- **Keep costs down and maintain the same learning budget year over year.**
- **Provide scheduling flexibility with over 300 substantive, online self-study courses.**
- **Host live webinars about hot topics that bring their professionals together for an interactive learning experience.**

### Webinars provide the latest information on hot topics

Briggs & Veselka purchases real-time webinars from Wolters Kluwer throughout the year. Loftis works with the management team and includes feedback from firm professionals in order to choose the right topics for the learning plans.

Because of the special CCH Learning Center and CCH Webinars bundle they purchased, an unlimited number of people at the firm could participate in a webinar for the same price, and Loftis tries to fill each webinar with at least 12 professionals to maintain an ideal cost per person. For hard-to-find topics, Loftis will make an exception.

*“Although I maximize my dollars by putting more people in the room, I do have some employees who work in very specialized areas. So, while it’s not an optimal situation to have just two people in a webinar, we’ll do it because the content is that good.”*

Firm professionals watch the live webinars together as a team. Wolters Kluwer also offers a recorded version, but the firm prefers the live format which provides CPE credit and the ability to ask questions of Wolters Kluwer subject matter experts.

*“For webinars, we gather our professionals together and provide lunch. It’s a lunch and learn. They gather together for two hours, in one room. We do it that way because we feel like we get a bigger response. It gives them the opportunity to network in-house. And, if there’s continued discussion or something needs to be clarified then everybody has an opportunity to discuss it before they walk away.”*

### Now, continuing education is a “win-win” for professionals and the firm

The response from the firm’s professionals has been positive. Loftis noted that many team members were planning out their entire year of CPE in advance, using the firm’s learning management solution and the Wolters Kluwer catalog of courses. That’s exactly what the firm was hoping to see — and it helps to avoid last minute scheduling conflicts that occur when professionals try to get all of their CPE in right before the deadline.

*“The days of squeezing in 40 hours of CPE in a two-week period at the end of your birth month are over. We give our professionals the menu and the learning plan and an application to help them map it out ahead of time. I was surprised at the number of employees who registered for courses on their own and scheduled all of their CPE for the year on their Outlook® calendars.”*

CCH Learning Center and CCH Webinars help provide a cost-effective training alternative to local webinars or traveling to national conferences. By mixing these online training options into each learning plan, Loftis has been able to meet her budgetary goals and control the cost of continuing education.

*“I was surprised, but I believe putting in this plan actually reduced the overall cost to our organization for CPE. This year, I didn’t have to increase my budget. I think we consistently run at less than \$10 per hour from Wolters Kluwer, and that’s a bargain. Typically, you can’t go to outside webinars and conferences at that price, even here in Houston.”*

## Tips for Designing and Implementing a Firmwide Learning Program

**Briggs & Veselka Co. compliance manager, Catherine Loftis, shares the following advice with firms that are trying to develop and institute a new continuing education program for accounting professionals:**

1. Design different plans for different roles. Provide plans that reflect the needs and objectives of different roles within the organization. Briggs & Veselka sends shareholders out to industry conferences more frequently than new employees.
2. Engage professionals by giving them choices. Busy professionals value flexibility and choices. Self-study CPE can help them manage scheduling conflicts by learning when they have time. It’s also important to provide a large selection of courses to choose from, so professionals can hone in on the most useful and interesting content for their areas of practice as well as explore other areas of interest.
3. Online self-study and webinars help reduce costs. CCH Learning Center and CCH Webinars help the team access up-to-date, relevant content at a lower cost than conferences.
4. Get partners and managers involved from the start. It’s important for everyone to see that the shareholders also have a learning program and value continuing education.
5. Make it worth their while. A system that helps professionals plan out their CPE requirements for the whole year can make things much easier. Loftis further encourages attendance at live webinars by providing free food for a “lunch and learn” experience.

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