

THE baldwin LINK

CPAs

Baldwin CPAs, PLLC

Employee
Newsletter

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Table of Contents

5-Star Client Service 2 - 3
Race for the Roses 4
Staff Fun 5 - 10
Staff News 11 - 13
Did you know? 14
Reminders 15
Anniversaries 16
May - July Birthdays 17

“The best way to find yourself is to lose yourself in the service of others.”

– Mahatma Gandhi



Upcoming
Holidays

Labor Day
September 5th

5 Star Client Service

Relationship Building

Underlying Principle:

"A brand is built from the inside out by people who use systems and follow processes to deliver amazing customer service."

Objectives:

- Connecting - communicating the right way
- Build and strengthen relationships proactively
- Build a branded institutional relationship

Steps:

- Understand your preferred style
- Connect proactively
- Execute

Taking the Order

Objectives:

- Meet team member expectations
- Find a way to exceed expectations
- Build capital and trust with team members

Steps:

- Prepare to take the order
- Ask and listen
- Write it up
- Restate and confirm

Delivering the Order

Objectives:

- Meet team members' expectations, on time and on budget
- Reconnect and satisfy emotional needs
- Build trust by delivering the order with style and flair

Steps:

- Summarize services and results
- Present other findings
- Illustrate benefits of your service
- Review costs



Benefits of Five Star Client Service

★ **By learning** about the power of branding, your firm will develop a shared perspective and language when working with one another.

★ **Practicing Five Star** principles internally will enhance the level of teamwork, respect and communication within your team.

★ **Building a culture** of consistency throughout your entire organization will improve the strength of your brand as viewed by clients and potential clients.

5 Star Client Service Continued

Offering Dessert

Underlying Principle:

"How wonderful it is that nobody need wait a single moment before starting to improve the world."

– Anne Frank

Steps:

- Consider varieties of dessert
- Determine your favorite dessert
- Learn the favorite dessert of your internal clients
- Offer dessert as often as possible

Collecting the Check

Underlying Principle:

"The perception of value is highest at the moment of delivery."

– Troy Waugh

The keys to obtaining great checks:

- Clarify resources and requirements up front
- Make sure you deliver from the co-worker's point of view
- Follow up quickly and accurately
- Recap the benefits

Recovery

Underlying Principle:

"To avoid situations in which you might make mistakes may be the biggest mistake of all."

– Peter McWilliams

Recovery is the systematic steps we take when we make a mistake or are presented with a problem.

Steps:

- Respond immediately
- Avoid arguing with co-workers
- Provide additional information
- Involve your supervisor

Ascertaining Satisfaction

Underlying principle:

"Don't mind criticism. If it is untrue, disregard it; if unfair, keep from irritation; if it is ignorant, smile; if it is justified, it is not criticism – learn from it."

Steps:

- Determine who you need to ask
- Ascertain satisfaction
- Evaluate
- Change behavior



2022 Q2 Results

Alan Long 267	Michael Januski 42	Lauren Hedges 28	Donna Zembrodt 19
Beth Overbey 92	David Prewitt 40	Tamara Henderson 28	Ciera Moran 13
Patrick Runge 87	Frances Johnson 38	Katie Mehall 27	Elizabeth Maegly 12
Lisa Foley 83	Ciarra Johnson 38	Brittany Dietrick 26	Nicole Rihn 12
Chris Hatcher 79	Lisa Marcum 36	Debbie Woodcock 26	Haley Stark 9
Myron Fisher 76	Charlotte Hackworth 34	Lisa Wettle 26	Bridget Mattox 6
Elizabeth Engle 65	Shaun Johnson 33	Carlos Pelayo 26	Megan Hall 5
Timothy Eldridge 62	Gabriella Hall 33	Claudette Eldridge 26	Elizabeth Conner 5
Katherine Neal 50	Jeremy Meade 32	Michaela Caudill 26	Matthew Ashby 4
Rania Roshdi 48	Zach Hardin 31	Kara Moreland 22	
Diana Dials 45	Edmund Furphy 29	Cheryl Charles 20	
Penny Damrell 43	Tyler Jackson 28	Melanie Gray 19	



- Earn furlongs by participating in marketing, sales, networking, and team building activities.
- Submit furlongs to Marketing every Sunday by midnight.
- Those who reach their goal each quarter will win a \$100 gift card.
- Those who reach their goal every quarter are entered into a grand prize drawing valued at no less than \$2,500!
- Furlongs can be earned from activities such as:
 - Contributing to the staff newsletter
 - Sending a personalized note to a client
 - Obtaining a new designation
 - Cross-selling
 - Attending a professional or civic organization meeting
 - Liking and sharing Baldwin social media posts
 - Attending a social outing with a client
 - Speaking at a seminar
 - Participating in Team Days

Furlongs Required Quarterly by Tier

In order to qualify for the quarterly \$100 gift card, team members must earn, at minimum, the following points based on their position within the firm.



Admins & Interns



Staff & Seniors



Supervisors & Managers



Partners



Staff Fun

Hope's Wings Domestic Violence Benefit





Staff Fun Situational Leadership Training

Situational Leadership Training was a great interactive workshop enjoyed by many team members.



Peer Review Conference



Alan presenting at the Peer Review Conference.



Staff Fun Alan's Strategic Plan Day



Suzan's Retirement Dinner



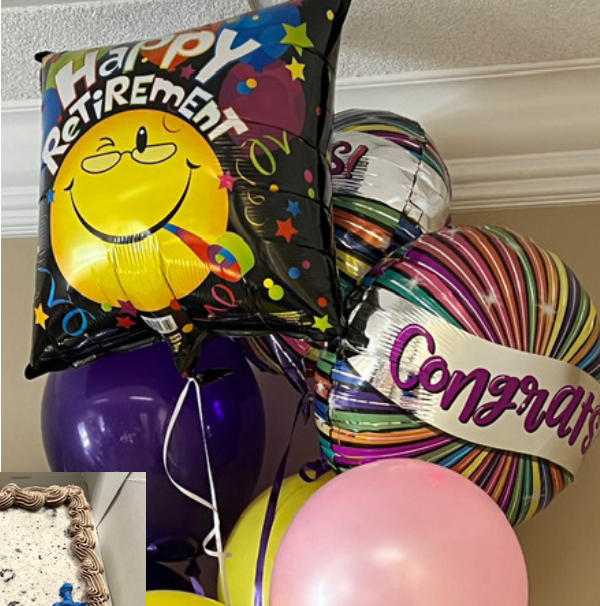


Staff Fun Five Star Training





Staff Fun Billy's Retirement Party





Staff Fun

Lunch for Ciarra with Elevate Team



Patronizing El Charro on Cinco de Mayo





Staff News

QBO Advanced Certifications



Matthew Ashby



Brittany Dietrick

Celebrations are in order!

Congratulations Matthew Ashby and Brittany Dietrick for becoming QBO Advanced Certified! This certification is a valuable addition to our team's expertise and allows us to further and better serve clients. The certification also provides a more in-depth knowledge of how to use QBO, including:

- Utilize advanced features (e.g. budgets, inventory, and job costing) available across all subscriptions
- Understand when and how to use special transaction and workflows based on client needs
- Reconcile and troubleshoot banking transactions and reconciliations
- Perform complex problem solving
- Understand logic of reporting and prepare customized reports
- Set up a new client (from scratch or converting from QuickBooks Desktop based on client needs)

**Congrats Brittany and Matt,
keep up the good work!**



Staff News Promotions

We are proud to announce the recent promotion of six of our staff members!



Katherine Neal has been promoted to Senior Associate.



Katie Mehall was recently promoted to Manager.



Rania Roshdi celebrates her recent promotion to Senior Manager.



Shaun Johnson was promoted to Senior Associate.



Tyler Jackson was promoted to Senior Associate.



Zach Hardin has been promoted to Senior Associate.

Congratulations!



Staff News New Hires



Brandon Hackworth joined Baldwin CPAs as an Associate.



Ashley Harrison joined as Payroll Specialist II.



John Hiles has joined our team as an Associate.



Elizabeth Maegly joined in July as Director of First Impressions.



Haley Stark joined in May as Director of First Impressions.



Did you know?

– Submitted by Lisa Marcum

Tips for a Healthy Summer

Follow these tips to help prevent chronic disease and have a #HealthySummer.

1

Move More, Sit Less!

Get at least 150 minutes of aerobic physical activity every week.

- Physical activity has immediate benefits for your health: better sleep and reduced anxiety are two.



2

Wear Sunscreen & Insect Repellent

Use shade, wide-brimmed hats, clothing that covers, and broad-spectrum sunscreen with at least SPF 15 for sun protection. Use insect repellent and wear long-sleeved shirts and long pants to prevent mosquito bites and ticks.

If you use both sunscreen and insect repellent, apply sunscreen first. After you come indoors, check clothing, body, and pets for ticks.

3

Keep Cool in Extreme Heat

Extreme heat can be dangerous for everyone, but it may be especially dangerous for people with chronic medical conditions.

- Stay cool.
- Stay hydrated.
- Stay informed.

4

Eat a Healthy Diet

Delicious fruits and veggies make any summer meal healthier.

- Healthy eating supports muscles, strengthens bones, and boosts immunity.

5

Rethink Your Drink!

Add slices of fruit to water for a refreshing, low-calorie drink.

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6

Don't Use Tobacco

You can quit tobacco today! Find the free quitting support that's right for you.

- Call 1-800-QUIT-NOW.
- Download the QuitSTART App.
- Access smokefree tools and tips.

For more about how to prevent chronic disease and maintain a healthy lifestyle, follow @CDCChronic on Twitter or visit www.cdc.gov/chronicdisease.





Reminders

Don't forget about the Baldwin Facebook, LinkedIn, and Twitter.



Out of the Office Checklist

- ✓ Update voicemail before leaving and change upon return.
- ✓ Turn on out-of-office in Outlook for duration of time away.
- ✓ Update Staff Dashboard.
- ✓ Update your personal and shared calendar in Outlook.



Anniversaries



Beth Overbey



Lisa Wettle



Debbie Woodcock



Congratulations on
your anniversary!



Birthdays

May

Matthew Ashby.....May 1st
Patrick RungeMay 21st
Cheryl Charles..... May 29th

June

Lisa WettleJune 2nd
Lisa MarcumJune 13th
Edmund FurphyJune 14th
Michael Januski.....June 15th
Charlotte Hackworth.....June 16th
Beth Overbey.....June 26th
Shaun JohnsonJune 27th
Katherine NealJune 30th
Gabriella Hall.....June 30th

July

Ciera Moran.....July 5th
Tyler JacksonJuly 30th



“Don’t just count your years.
Make your years count.”
– *George Meredith*