

Automatic culture

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By
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Firm culture wasn't allowed to just spontaneously develop at upstate New York-based firm The Bonadio Group. Deliberately fostered over a number of years, what the firm calls "The Bonadio Purpose" today has been designed by firm management to give its employees a sense of satisfaction and, as its name suggests, purpose in providing accounting and advising services to its clients.

But the firm had help.

Eight years ago, when Bonadio was considering its core cultural principals, it saw no reason not to automate that part of their business just as it would its tax workflow or document management processes. So, the firm recruited software company Brand Integrity internally to help establish and automate its cultural vision across its 10 offices, which house 89 partners and 760 employees.



The Bonadio Group's Management Committee: (left to right) Rochester office managing partner Bruce Zicari, CEO Thomas Bonadio, chairman and Buffalo office managing partner Mario Urso, COO Robert Enright
Courtesy of the Bonadio Group

Almost a decade later, this January, The Bonadio Group became the first official reselling partner of Brand Integrity, and clients of the firm can now access the employee engagement software with advisement from The Bonadio Group's client-service professionals. Bonadio's core principals are threefold, falling under purpose, promise and vision; but clients who buy Brand Integrity from the firm as a value-added service can implement their own cultural precepts using the tools the solution offers.

Over its lifetime, The Bonadio Group has completed a dozen mergers, and so it's been "very important to perpetuate our culture in all these new offices that have been merged in from outside," the firm's Rochester office managing partner, Bruce Zicari, told Accounting Today. Brand Integrity, Zicari said, helped the firm do this by helping them automate the kind of culture they were already trying to cultivate.

For instance, firm management believes that one of the primary ways in which staff perform better is if they're happy, and the firm tries to improve happiness with a program around employee recognition. Brand Integrity offers an employee recognition tool through which employees can send in stories of something a colleague did that was impressive or helpful in some way.

"Then every week, we email out all the recognition, and every recognition tells a story – who was involved, what they did, how it relates to the Bonadio purpose," Zicari said. "It really tells a story about our culture."

The technology also offers a module for organizations to define their core values and behavior expectations, so employees have clear guidelines to view; and employee as well as customer assessment surveys so organizations can get insight into how much adherence they're achieving, and decide whether to adjust accordingly.

Brand Integrity provides an e-learning and in-person "academy" on its platform, meant to help managers develop communication skills and habits, aimed at helping them become better leaders. The module includes resources on hiring, onboarding, performance conversations, and other operational processes.

Bonadio management feels that automating culture is logical because it's one of the most important factors in recruitment and retaining of new accountants.

"For potential hires, especially young people, it's extremely important to them to work with a firm that aligns with what they believe in," Zicari said. "Our Bonadio Purpose has been with us for few years now, and it resonates with everybody. Everything we do is around those ideas."

Gregg Lederman, CEO of Brand Integrity, sees Bonadio as a natural fit as a partner because the firm leaders understand that “lack of employee engagement is really expensive.”

“By partnering with us, Bonadio is helping their clients to save money or make money,” Lederman added.

The reselling partnership is meant to be organic – typically, according to Bonadio, partners or managers from the firm will refer a client to Brand Integrity if the client is seeking to impact business outcomes through improved employee engagement or overall culture initiatives. Once an introduction is made, the Brand Integrity team works directly with the Bonadio client to craft and implement a solution.

The Bonadio Group placed at no. 40 on Accounting Today’s Top 100 Firms list for 2018. For more information on Bonadio’s services, visit <https://www.bonadio.com/our-services>; and for more on Brand Integrity, visit <http://www.brandintegrity.com/>.



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