

Insero & Company Gets

Partners Involved

The shift at Insero & Company toward becoming more growth focused began in January of 2002 when the Rochester, NY accounting and consulting firm brought in The Whetstone Group, Inc. to lead the firm through growth planning. The planning sessions went well, and Insero chose to implement their plans at that time using internal resources. "I bought into the whole process immediately," recalls Nancy Catarisano, CPA, Partner, and the leader of Insero's outsourcing team. "I was passionate about it. Our outsourced accounting niche team used the process to keep us focused, but for the rest of the firm, the momentum began to fade and activities weren't being implemented."

Getting Ready for Growth

Insero invited Whetstone back in 2007, and the firm was ready to approach growth head-on. "We had buy-in before we brought Whetstone in the second time," says Catarisano. "The first time the firm just wasn't ready to embrace the growth culture."

"Accountants are analytical. It's hard for many of us to just be introduced to a concept and then run with it. We need to see it, touch it, work with it, understand it," explains Vince Leo, partner.

"That's what the second session did for our partner group – it gave us the chance to really understand the concepts and our roles. Spending the afternoon with Whetstone was a beneficial use of our time."



Finding a Role for Everyone

Whetstone's process shows firms that everyone has a valuable role in growth.

"The partners were able to pick up on ways they would be comfortable contributing," says Leo. "Not everyone had to network or make sales calls."

Insero continues to embrace a focus on growth. They have retained Whetstone to help with implementation of business development activities, and Whetstone returns quarterly to compare the firm's results to goals and ensure the process keeps moving smoothly.

"I've seen an even greater shift now," says Leo. "The atmosphere has moved from 'business development is one person's responsibility' to 'it's the responsibility of everyone.'"

"We have overwhelming buy in and the firm is buzzing with excitement. Even the least marketing-focused partners related to Whetstone. They helped us all understand that growth is more than just getting new clients – everyone has a piece they can contribute."

The Whetstone Group

Growth Tools for a Competitive Edge

707 7th Avenue - Marion, IA 52302 - v: 319.447-6400 - f: 319-447-6439

www.thewhetstonegroup.com