




Culture Driven Results

FEI Presentation – Wisconsin
February 2021

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor



Culture eats strategy for

Breakfast

Lunch

Dinner

Midnight Snack

Volatility



Economic

+

Social

+

Political



Culture



Good



Bad



Ugly



Polling Question #1:

I believe Culture is:

- a. Critical to impact results*
- b. Helpful to impact results*
- c. Unlikely to impact results*



Polling Question #2:

My team would say Culture is:

- a. Critical to impact results*
- b. Helpful to impact results*
- c. Unlikely to impact results*



32%

of working-age
adults worldwide
have a “good job.”

Source: State of Global Workplace – Gallup Report



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15%

of employees worldwide
are engaged in their job.

Source: State of Global Workplace – Gallup Report

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85%

of adults worldwide are
not engaged or are actively
disengaged.

Source: State of Global Workplace – Gallup Report

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EMPLOYEE ENGAGEMENT RESULTS AMONG RESIDENTS WHO ARE EMPLOYED FOR AN EMPLOYER

Based on data aggregated from 2014-2016 Gallup World Polls*

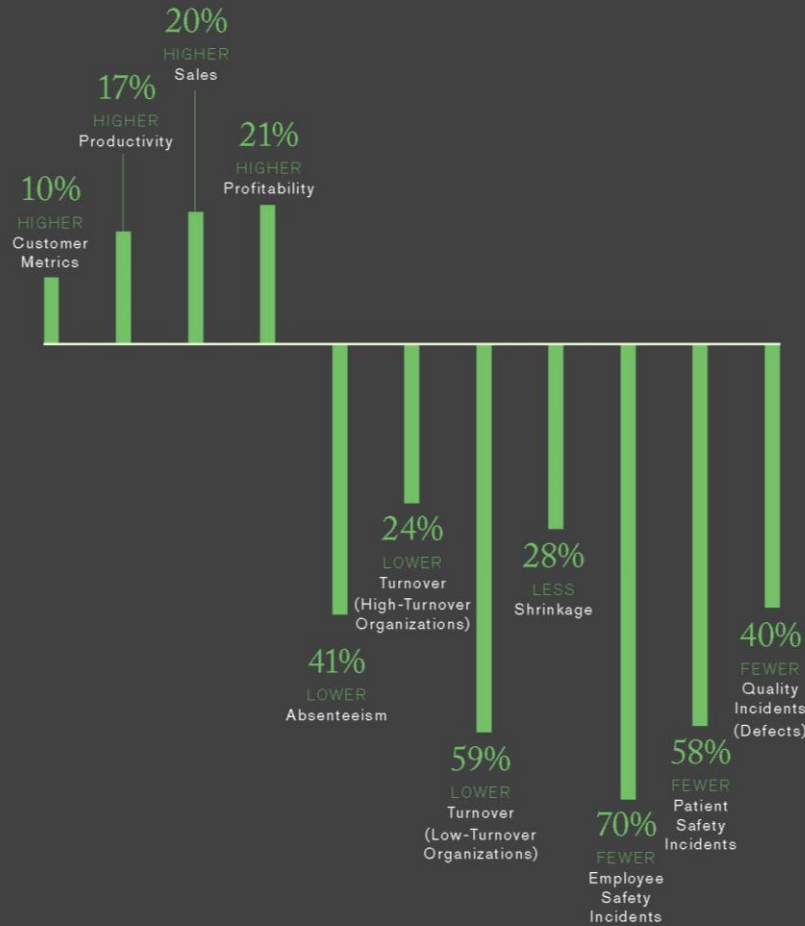
■ % Engaged ■ % Not engaged ■ % Actively disengaged



Source: State of Global Workplace – Gallup Report



When compared with business units in the bottom quartile of engagement, those in the top quartile realize improvements in the following areas:



Source: State of Global Workplace – Gallup Report



69%

of employees say they'd
work harder if they were
better appreciated.

Source: Smarp/Hubspot

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Polling Question #3:

Since COVID hit, our Engagement has:

- a. Improved*
- b. Become worse*
- c. Stayed the same*



Since the outbreak of the
pandemic,

53%

of employees surveyed by HBR
say they feel more exhausted.

Source: Smarp/Harvard Business Review

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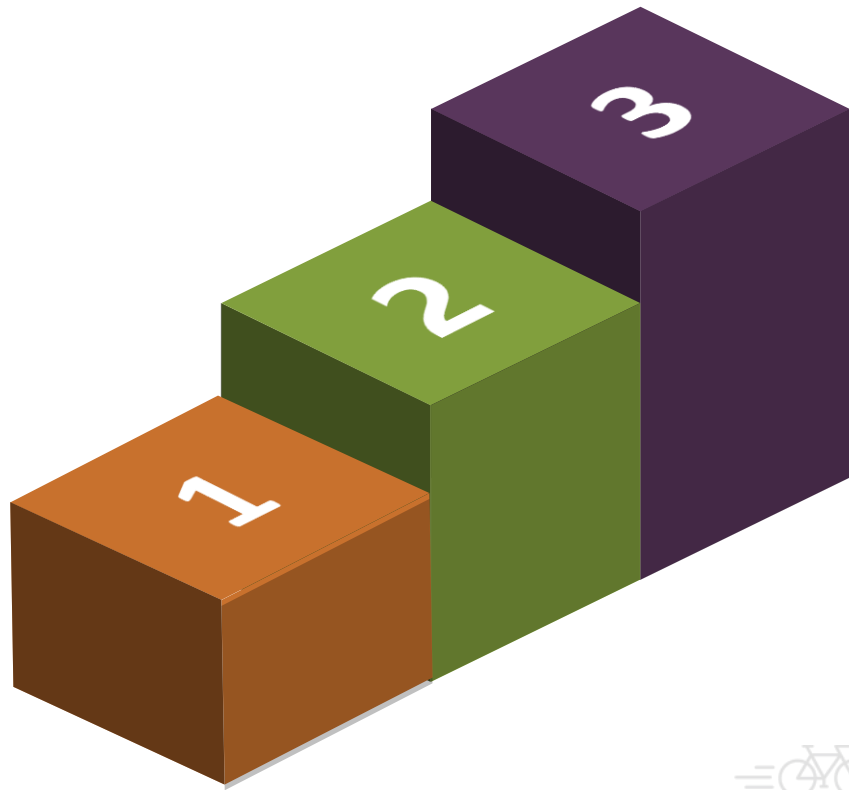
Great, so how do we advance?

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3 Steps to Experience Culture Driven Results

1. **Define** Culture & Purpose
2. **Engage** your teams
3. Create your **Inspiration Loop**





Define Your Culture, Purpose and Values

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THE FOUR ESSENTIAL ELEMENTS OF THE CLA PROMISE

OUR PURPOSE

CLA exists to create opportunities — for our clients, our people, and our communities.

OUR PROMISE

We promise to know you and help you.

OUR CLA FAMILY CULTURE

We're one family, working together to create opportunities.

STRATEGIC ADVANTAGES

- Deep industry specialization
- Seamless, integrated capabilities
- Premier resource for private business and owners
- Inspired careers

DRIVEN BY OUR VALUES

Curious

We care, we listen, we get to know you

Collaborative

We help you seamlessly, bringing innovative teams to the table

Transparent

We communicate clearly and authentically

Inclusive

We embrace all voices and create opportunities for you in an energetic and inspiring environment

Reliable

We respond in hours, not days; we follow through, protect our client data, and produce quality results



Engage Your Teams

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Polling Question #4:

People at my company are fully engaged

- a. 80% of the time*
- b. 50% of the time*
- c. 15% of the time*



Are we
having
FUN yet?



Create Opportunities



69%

of employees say they'd
work harder if they were
better appreciated.

Source: Smarp/Hubspot

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CULTURE: CARING FOR OUR CLA FAMILY

Remote Work

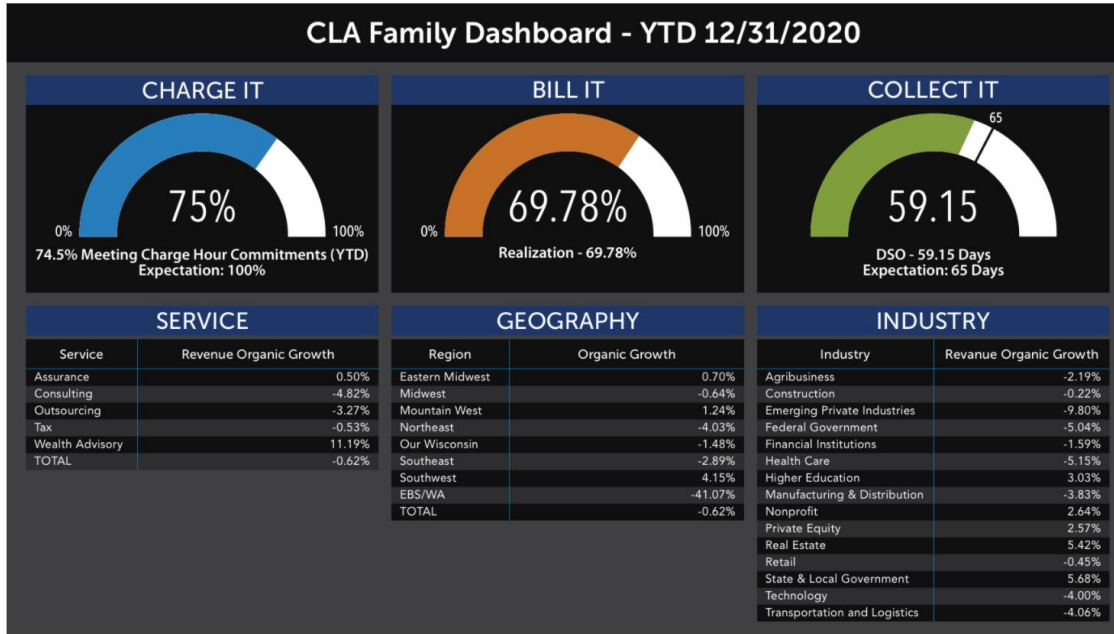
When the pandemic struck in March, we moved incredibly quickly and efficiently to a new environment of remote work. Overnight change isn't easy, but when we work together in a moment of urgency, **we are able to adapt.**



Create Opportunities

The Business of CLA

CLA Family Dashboard



Empowering you
with the knowledge
to make your
impact.

[View the full financial dashboard on Microsoft Power BI.](#) Use the filters at the top and tabs at the bottom to drill down into geography, industry, and service data.



Create Opportunities

2020 Top 100 Firms: Accounting Today

Rank	Firm	Headquarters	Chief executive	Revenues (in \$mn)	% chg.	Offices	Partners	Total employees
1	Deloitte	New York City	Joe Ucuzoglu	\$21,913.00	10.13	130	5,811	106,918
2	PwC ^{§1}	New York City	Tim Ryan	\$17,400.00	3.26	91	3,749	58,000
3	Ernst & Young [§]	New York City	Kelly Grier	\$15,000.00	7.14	104	3,600	45,000
4	KPMG ^{§2}	New York City	Lynne Doughtie	\$9,970.00	5.39	102	2,279	38,043
5	RSM US ³	Chicago	Joe Adams	\$2,436.37	13.76	87	903	10,882
6	Grant Thornton ⁴	Chicago	Bradley Preber	\$1,950.56	4.58	56	606	8,730
7	BDO USA	Chicago	Wayne Berson	\$1,640.00	11.56	65	618	7,330
8	CLA ^H	NA	Denny Schleper	\$1,145.33	20.06	120	848	6,071
9	Crowe	Chicago	Jim Powers	\$958.30	3.72	37	328	4,267
10	CBIZ & MHM ⁵	Cleveland	Chris Spurio and Andy Burczyk	\$811.28	3.36	91	458	3,959

Key and notes: Last year's rankings have been revised based on updated 2018 revenue provided by firms. Some firms' rankings will therefore differ from those reported last year.

* Firm estimate § Gross revenue P Reported equity and non-equity partners as a single combined figure. H Firm does not recognize a single headquarters. NC No change NA Not available or not applicable NR Not ranked

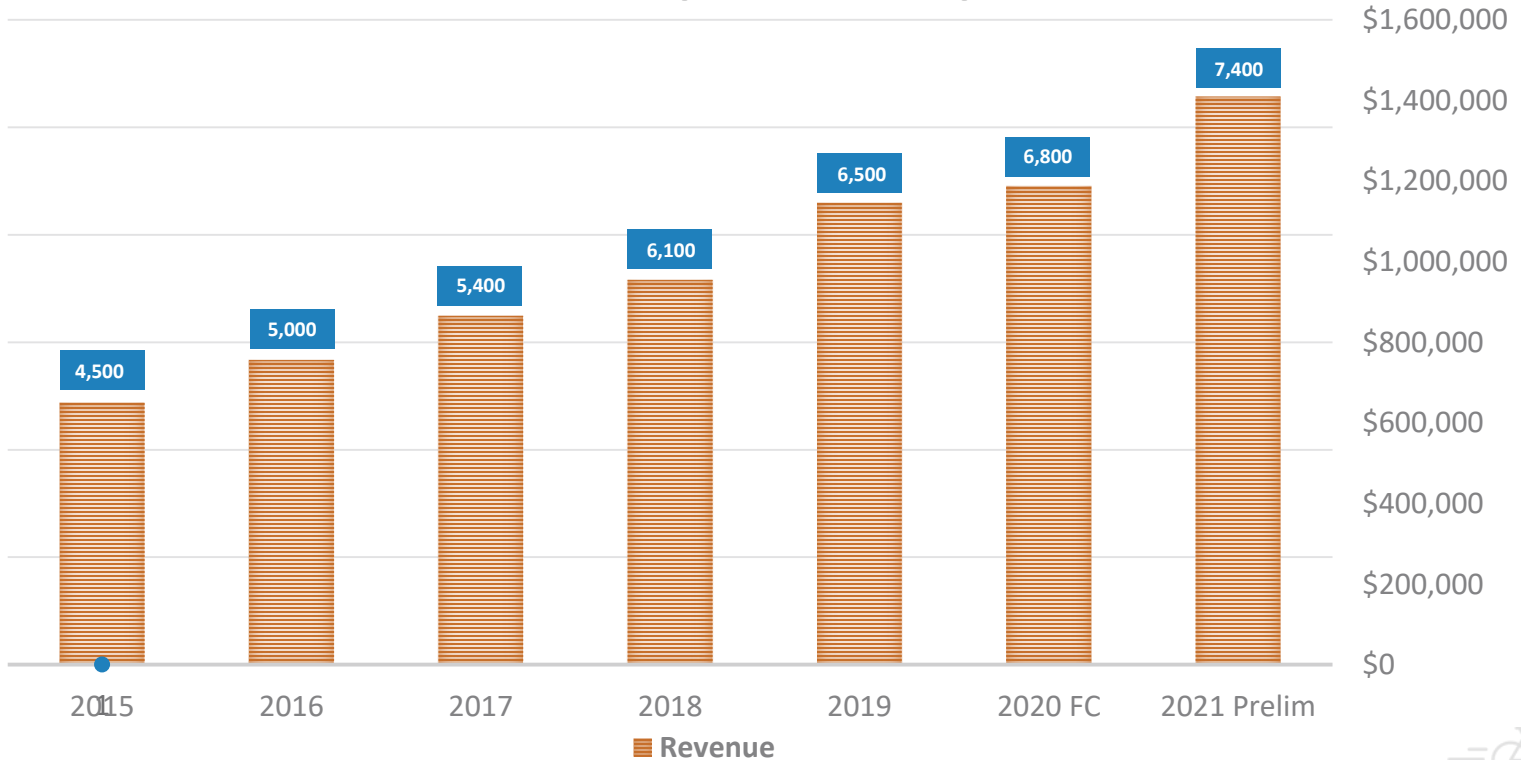
1 2019 revenues reflect sale of public sector business at the end of FY 2018. Partner figures are AT estimates based on published reports; all other figures are firm-supplied. 2 KPMG reports its number of business offices, not every physical location. 3 RSM US reported fee splits as both percentages and dollar amounts. 4 Total personnel includes professionals in Grant Thornton's India Service Center.

5 Office figure is for CBIZ; MHM has 27 offices.



Revenue: Average annual increase of 10% between 2015–2021, ranging from 4.5% - 20% each year

GROWTH IN **REVENUE** (IN \$000'S) AND **PEOPLE**



Be mindful of all voices

All generations

All backgrounds



Create opportunities

for people to connect, share and belong...



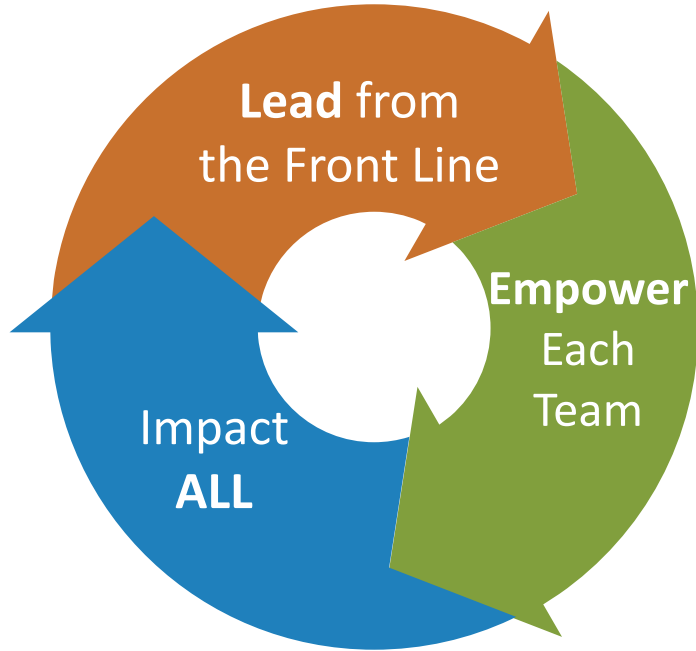


Create Your Inspiration Loop

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Organization



Individual





Polling Question #5:

My company talks about Culture

- a. Often*
- b. From time to time*
- c. Hardly ever*

A close-up photograph of several hands, belonging to people in business attire, cupping a small green seedling growing out of a mound of dark soil. The hands are positioned in a circle, with fingers pointing inwards, creating a protective and nurturing frame for the plant. The background is softly blurred, showing more hands and parts of the people's clothing, emphasizing a collective effort.

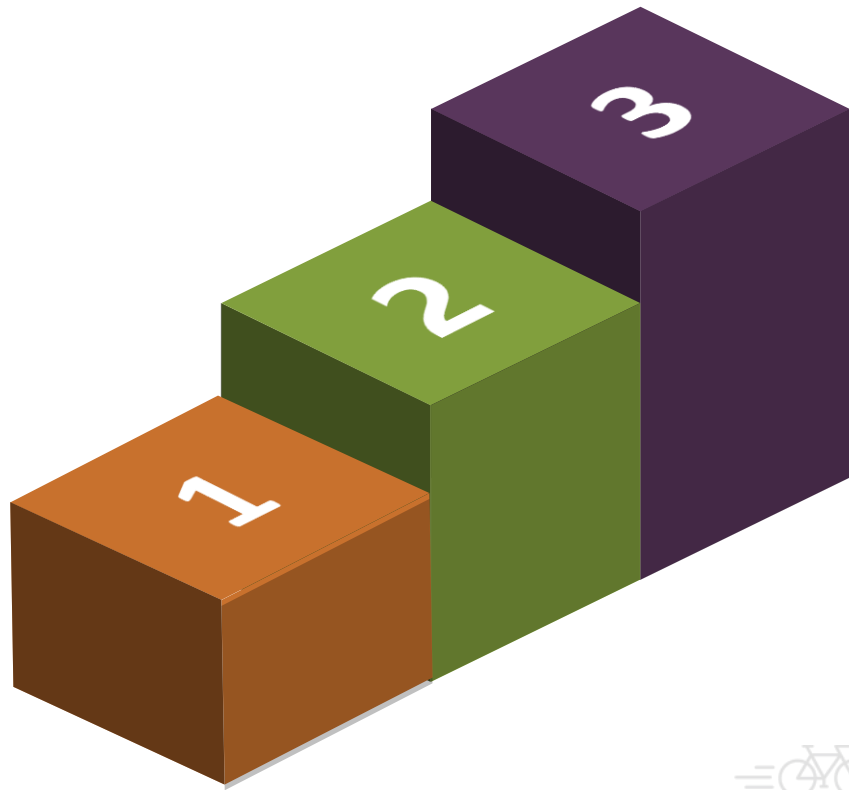
CULTURE will be impacted over time.

Keep investing.

Keep building.

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CULTURE can be a competitive advantage.

