

GUIDE

Navigating the Sensiba Career Lattice

At Sensiba, Your Opportunities are Wide Open

At Sensiba, we've built and sustained our professional reputation and loyal client following thanks to our team's talent and dedication.

To support our continued success, we're committed to your professional growth. Professional development and advancement is a two-way street—we'll look to you for leadership and feedback and, in return, we're committed to supporting you with resources at each stage of your career.

We like to think of our career ladder as more of a lattice, which allows for vertical and lateral movement between jobs and skills.

Sensiba's career lattice helps you identify new opportunities, broaden your skills, and make new connections that will help you take advantage of opportunities when they arise.

We prepared this guide to provide an overview of how your client service career can unfold at Sensiba, and how your skills and talents contribute to our combined success. Your path to success will require dedication and a passion for an excellent career—a passion to be the very best. While the basic "levels" are traditional, each person's lattice may look different.



To begin building your career lattice, read on as these ideas can help you get started:

◆ **Align yourself with a mentor.**

Mentors can be anyone in the firm who is excited about investing in your professional development and supporting you.

◆ **Take steps to grow.**

Volunteer for projects - big and small. By taking on new and more advanced tasks, you discover your passions and strengths; and you begin to build your lattice.

◆ **Share with others.**

If you're knowledgeable about a topic that can benefit others, don't be afraid to offer your expertise. Offer to conduct a CPE presentation. Ask your manager or partner about leading a lunch and learn on a topic that you're excited about.

◆ **Expand your horizons.**

Look for opportunities to speak at conferences. You can discuss topics you're passionate about, while meeting new people with similar interests and discovering new resources and opportunities.



At Sensiba we empower you to
determine *your* career path.

We're so excited you're here, and we look forward to
working with you to build a rewarding career filled
with fun, challenging work, financial success, and
lifelong relationships.



Associate



Associate

The associate role is the starting point in your career.

As an associate, your professional focus is on developing your technical, project management, and communication skills, as well as earning your credentials as a certified public accountant. Your role is vital to Sensiba as you support your fellow team members on engagements while gaining specific client and industry knowledge. You participate in classroom and on-the-job training, where you learn fundamental technical accounting skills, auditing and client service standards, and team communication.

You'll start to gain an in-depth understanding of what we do and your vital role in collaborating with your teammates.

Your time as an associate is critical to your professional development—this is when you begin to develop professional habits that will help you for the rest of your career, including self-study, communication, work paper technique, time management, and issue assessment and resolution.

Your engagement team and performance manager will coach you to improve and develop professionally. Associates should actively study for and pass a minimum of two sections of the CPA exam.

Right From the Start

During your first days at Sensiba, you'll be paired with a trained and certified career coach who will help you develop and refine your client service, productivity, and technical skills. Through monthly meetings, you'll be supported and coached to reach your highest potential, understand yourself better, and serve your clients more effectively.

Your coach will help you:

- ◆ Develop resilience.
- ◆ Gain confidence to have difficult conversations.
- ◆ Delegate work more effectively.
- ◆ Gain more clarity about your work and role.
- ◆ Break client service challenges or ongoing projects into manageable steps.
- ◆ Develop detailed plans to achieve your goals.

We invest in professional coaching to help you increase your productivity and performance. As your career develops, your coach will support you, help you address any obstacles that may emerge, and collaborate with you as you tackle more challenging projects and roles.

How will you know when you have mastered the Associate role?

As a successful associate, you'll demonstrate exemplary professional behavior and solid interpersonal and communication skills with team members and clients alike. You'll exhibit a strong commitment to learn, improve, apply, and retain technical skills, and display an eagerness to work on new tasks and areas that lead to continued technical and professional development.

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The focus on education and leadership at Sensiba really stands out for me.



Experienced
Associate

- 1 Complete increasingly challenging technical projects
- 2 Lead small engagements
- 3 Provide direction to developing staff
- 4 Focus on the CPA exam or other equivalent certifications
- 5 Identify client service and engagement efficiency opportunities

Experienced Associate

Once you have transitioned from student to client service professional, the next opportunity will be experienced associate (EA).

As an experienced associate, you continue to support your team in completing assignments in an efficient manner as you take on a larger role in training, developing, and supervising less experienced staff. In this process, you begin to fine-tune your internal and client communication and project management skills in preparation for the senior associate role. You also begin to deepen your technical skills by participating in formal and on-the-job training.

You now have the opportunity to make a greater impact on your engagement teams as you take on more technically challenging assignments and serve as a role model for less experienced associates.

You should regularly identify opportunities to improve internal procedures and processes with your seniors and managers, with the goal of improving client service and

engagement efficiency. You should also explore participating in events and affiliations as you begin to network with other professionals outside of Sensiba.

At this point, you should be well on your way to earning your professional credentials as a certified public accountant or other equivalent credential. In fact, we expect an experienced associate to sit for at least three CPA exam sections per year until the exam has been passed. The pressure is on, but the reward is great!

How will you know when you have mastered the experienced associate role?

As a successful experienced associate, you demonstrate exemplary communication and technical skills; you have strong working relationships with your teams and clients, a maturing knowledge of most technical areas, and are able to lead a small engagement successfully.



Senior
Associate

- 1 Work closely and directly with clients
- 2 Develop specialized technical expertise
- 3 Supervise multiple client assignments simultaneously
- 4 Coach and develop other professional staff
- 5 Communicate effectively with all team members
- 6 Complete the CPA exam or other equivalent certification

Senior Associate

The time you spend as a senior associate (senior) is a key period in your career.

The promotion to senior associate signifies that you have successfully built a solid foundation for your future growth as a public accountant. As a senior, you're the cornerstone of our client engagement teams. While ensuring client satisfaction and appropriate execution of engagement plans, you're a coach and advisor to your team members and the conduit through which most communication travels. It is your role to ensure information is transferred efficiently and appropriately.

In this role, you develop and demonstrate deep knowledge of the technical issues and their application in your chosen discipline(s). You also help manage engagement economics, bringing potential change orders to the attention of clients, your manager, and your partner. During your time as a senior, you will complete all parts of the CPA exam pursuant to earning your professional credentials as a certified public accountant.

As a senior, you work more closely and consistently with your clients than at any other level within the firm. As such, you should be actively listening and processing client

information with an eye toward identifying additional service opportunities that will help your clients become more efficient and grow their businesses. You also help manage the expectations of managers, partners, and clients about the timing of engagement projects, and coordinate with team members to adjust for any schedule changes.

How will you know when you have mastered the senior role?

You're ready to move on to the role of an experienced senior when you can supervise several client assignments simultaneously, successfully coach and develop other professional staff, and have passed all parts of the CPA exam or other equivalent certification requirements. Senior associates may not proceed to the experienced senior role until they've passed the exams.



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Never do I feel lonely or unsupported in both my professional and personal life.

Experienced
Senior Associate

1

Focus on practice growth

2

Coach, inspire and develop others

3

Manage engagements (including client service, economics & profitability)

4

Licensed CPA or other equivalent certification (JD or enrolled agent)

5

Specialized expertise in one or more practice areas

Experienced Senior Associate

The experienced senior role is a point in your career where you're fine-tuning the engagement management skills you learned as a senior.

As an experienced senior, you successfully tackle larger and more complex engagements, and develop specialized technical expertise in one or more areas or industries. You're responsible for implementing solutions, as well as actively identifying areas where we should be expanding services and providing additional value to each client. You're also expected to:

- ◆ Define and manage project economics.
- ◆ Participate in discussions with clients about change orders.
- ◆ Contribute to the learning and development of less experienced staff through mentorship.
- ◆ Actively participate in technical in-house trainings.

You're responsible for planning, monitoring, and completing several engagements simultaneously, in addition to taking on a stronger leadership role.

At this point in your career, practice growth is becoming a more prominent part of your contribution.

This includes identifying new services for existing clients, the continued growth and maintenance of your external professional network, and working on business development opportunities. You contribute to external content, such as composing blog articles or conference presentations and similar activities.

How will you know when you have mastered the experienced senior role?

As an experienced senior, you're ready to move on to the role of manager when you're a fully accredited CPA, JD, or enrolled agent, and when you can successfully supervise several large, complex client assignments simultaneously, serve as a technical expert in your chosen niche(s), and are actively and consistently contributing to our business development efforts.



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What makes me want to come to work everyday is the people.

Manager

1

Efficiently execute client engagements with a focus on improved client service, economics & profitability

2

Actively expand business development activities

3

Demonstrate leadership in chosen area(s) of specialization

4

Develop & implement firm-wide initiatives

5

Successfully mentor and develop professional staff

Manager

Sensiba's Managers are responsible for much of the leadership.

Managers are licensed CPAs or equivalent licensed professionals (JD or enrolled agent). As a manager, you actively pursue self-development opportunities while remaining current on required continuing professional education.

For example, you take ownership of client assignments, serve as a teacher, mentor staff members, and contribute to the conception and execution of firmwide initiatives as well as our business development efforts.

Managers are responsible for meeting client service expectations, identifying and vetting key technical issues, and ensuring clients understand the complete scope of their accounting, tax, and business issues. Your role includes:

- ◆ Building, directing, and maintaining empowered teams.
- ◆ Anticipating issues, planning for their resolution, and ensuring appropriate and timely execution.
- ◆ Managing engagement budgets, communicating change orders with clients, and securing written approval.

- ◆ Identifying client needs and opportunities to serve them more effectively.
- ◆ Developing more efficient processes and expanded services, using the talents of other internal (or external, where appropriate) specialists.

While your primary role is to facilitate the efficient execution of client engagements, you're also expected to actively manage a growing network of professional peers whose talents and services are relevant to your client base. Additionally, you'll begin to actively mine these relationships for new business opportunities.

How will you know when you have mastered the manager role?

You're ready to move on to the role of senior manager when you're a proven leader; you play a significant role in our business development efforts, you have a solid record of exceeding client expectations, and you successfully

and consistently cultivate a high-performance team. Your promotion from manager to senior manager also hinges on a demonstrated desire and ability to enter the firm's partnership.



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I think Sensiba brings a really unique culture to the public accounting mix.



Senior
Manager

1

A leader in the firm and the profession

2

Key contributor to the firm's business development efforts

3

Ensure client satisfaction and loyalty

4

Successful coach and mentor

5

Focus on practice growth

Senior Manager

As a senior manager, you're a proven leader.

You develop client solutions while maintaining empowered and motivated teams that assist in the delivery of these solutions. You foster and nurture long-term relationships with clients' senior management, contribute significantly to our business development efforts, support the partners in identifying ways to enhance and grow the firm, and serve as a mentor and role model to staff and less experienced managers.

You're responsible for leading a profitable and functional practice. You ensure exceptional client service by setting a positive example for team members and support our growth by identifying and consistently attracting and serving new clients. You pursue self-development opportunities while remaining current on required continuing professional education. You're a technical leader in your chosen area(s) of specialization and participate in internal and external initiatives that elevate your specialty area(s).

How will you know when you have mastered the senior manager role?

You're ready to become a partner when you're not only a proven leader within the firm, but also in the public accounting profession and your chosen niche(s). You're willing to proactively manage the firm's risks while consistently providing exceptional solutions to problems. You must be a technical expert, maintain a high level of client satisfaction and loyalty, have a strong affinity for business development, and consistently inspire, develop, and maintain high-performing teams. Senior managers moving to the partner role complete a partner-in-training program.



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I've really enjoyed and appreciated that I had the ability to choose my own career path.



Director

- 1 A trailblazer within the firm and profession
- 2 Develops people, while leading and motivating others
- 3 Anticipates client needs and provides proactive consultation
- 4 Non-practice staff career pathway (HR, IT, Marketing, etc.)
- 5 Has a voice in firm management
- 6 Excellent technical knowledge and quality of work
- 7 Leads internal training efforts
- 8 Non-traditional designations/ certifications are highly valued (Engineer, Data Analyst, CISA, CISSP, IIA, PMP)

Director

As a Director, you are a valued member of the leadership team.

Many valuable, high-performing employees don't necessarily want the buy-in, commitment, or liability that comes with being a partner, so we've created the director career path. We believe that by offering flexibility in our roles, we'll retain the highest caliber of talent and maximize our employees' career satisfaction.

Whether you're leading a marketing or finance team or a specialized niche, serving clients or staff, our director path provides opportunities to develop your craft and excel in your career.

Directors at Sensiba are subject matter experts, with relevant certifications in their areas of expertise or chosen specialization. They may focus on delivering impact with clients, developing people, or growing services, depending upon their individual skills and aspirations.

Regardless of their chosen focus area, directors are highly skilled in their field and have the capacity and desire to take our firm and services to the next level.

No matter where you are or what you've accomplished during your career, whatever lies ahead will be unique to you. Rather than a one-size-fits-all approach to planning your future, Sensiba empowers you to personalize a career plan in a way that balances your individual strengths and passions with the strategies of the firm.

Please reach out to your performance manager or the Human Resources department for more details.



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We are delighted to offer the Director role as a non-traditional career pathway for ambitious, dedicated leaders who may not desire to become a Partner.

Partner

- 1 Leader of the firm and the profession
- 2 Technical expert within niches
- 3 Build great relationships
- 4 Ensure client service quality
- 5 Strong focus on business development and firm growth
- 6 Develop and inspire high performing, loyal teams

Partner

Congratulations — as a Sensiba partner, you're now an owner of the firm.

Alongside your fellow partners, your focus is on increasing our market share through active business development, ensuring the quality of our services, and developing high performing teams. Your leadership and the example you set in your specialty practice will define the group's success.

While you have one or more areas of deep technical expertise, your primary role is to promote a seamless delivery of services to our clients, contributing to their success. Additionally, you strive to find ways to better serve our community while building strong relationships within your business network.

Being a partner means you've demonstrated the dedication and personal drive to be the best in our profession, and you have credibility as a leader who inspires long term client and staff loyalty. This personal drive to be the best, coupled with strong business acumen and leadership skills, propels our firm forward with endless possibilities for growth.

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I've been so fortunate to have had mentors here that have been so supportive.



Family. Community. Firm.

From giving back to our communities to working together with integrity and respect, Sensiba is passionate about our value-based culture.

Come check us out and see
how you can fit right in!



