



# Straight Thoughts, Straight Talk

*"Serving Andersen Alumni Worldwide"*

2026

Vol. 19 No. 1

## Editorial

Warren Turner — Editor

That trust was earned through shared experience and a clear standard instilled early in our careers: Think Straight. Talk Straight. It was not a slogan—it was a discipline, a discipline meant to carry forward through the rest of our days. Years and titles may separate us, but the foundation remains. It shows up in how we approach problems, speak plainly, and hold ourselves accountable. Our Association exists to sharpen one another—to reconnect, to learn, and to celebrate the accomplishments of fellow alumni who still live the standard. Iron sharpens iron. Our cohort is stronger when we show up together.

Join me in congratulating Alumnus Mark Vorsatz and his team at Andersen Global on the firm's Initial Public Offering (IPO) on December 17, 2025. The firm officially listed on the NYSE under the symbol ANDG.

Warren Turner

Lastly, we need your help to further strengthen and maintain our Andersen Alumni network. Please leverage our Social Media Presence and [LIKE our Facebook page](#) and [JOIN our LinkedIn network](#), and lastly you can [FOLLOW us on LinkedIn](#) as well.

**As Always Think Straight Talk Straight...**

**Warren Turner**

Editor

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## Alumni on the Move

Andersen Alumni Association



Congratulations to the Following Alumni and Best Wishes in your new roles.

## Alumni on the Move

<a href="#">Alaleh Jenkins</a>	<a href="#">David Gadecki</a>	<a href="#">Jim Fowler</a>	<a href="#">Phil Kangas</a>
<a href="#">Amanda Popolare</a>	<a href="#">Dawn Huff</a>	<a href="#">John Kinzer</a>	<a href="#">Rafe Brown</a>
<a href="#">Andy Kitzmiller</a>	<a href="#">Denise Holland Dresser</a>	<a href="#">Juan Diaz</a>	<a href="#">Ron Kozlin</a>
<a href="#">Anthony Bigornia</a>	<a href="#">Derek Carlson</a>	<a href="#">Karina Braun</a>	<a href="#">Ron Pachura</a>
<a href="#">Ashoo Gupta</a>	<a href="#">Dominic C. Canuso</a>	<a href="#">Kevin Malone</a>	<a href="#">Samantha Fawcett</a>
<a href="#">Aziz El-Tahch</a>	<a href="#">Ed Philbin</a>	<a href="#">Kevin Skinner</a>	<a href="#">Sandra Lamartine</a>
<a href="#">Brian Ellis</a>	<a href="#">Edward Codispoti</a>	<a href="#">Kyle Sauers</a>	<a href="#">Scott Smith</a>
<a href="#">Chad Handshy</a>	<a href="#">Edward Pitlik</a>	<a href="#">Laura Behr</a>	<a href="#">Shante Carter</a>
<a href="#">Chip Corboy</a>	<a href="#">Eric Heffernan</a>	<a href="#">Lauren Kuminka</a>	<a href="#">Steve Bennet</a>
<a href="#">Chris Deal</a>	<a href="#">Eric Verity</a>	<a href="#">Marie Washburn</a>	<a href="#">Stuart Sim</a>
<a href="#">Chris Kraft</a>	<a href="#">Eric Wainscott</a>	<a href="#">Mark Lefever</a>	<a href="#">Sue Hohenleitner</a>
<a href="#">Chris Stead</a>	<a href="#">Felix Wu</a>	<a href="#">Mark Siemek</a>	<a href="#">Sylvia Metayer</a>
<a href="#">Christopher Frank</a>	<a href="#">Gerald Kozel</a>	<a href="#">Mary Holt</a>	<a href="#">Thierry Delaporte</a>
<a href="#">Connie Valencia</a>	<a href="#">Greg Lavin</a>	<a href="#">Matt Brickey</a>	<a href="#">Todd Thompson</a>
<a href="#">Cory Pace</a>	<a href="#">James (Jim) Rojas</a>	<a href="#">Matt Jordan</a>	<a href="#">Tom Hitselberger</a>
<a href="#">Dabie Tsai</a>	<a href="#">Jason Bailey</a>	<a href="#">Maxwell Kagan</a>	<a href="#">Tom Munley</a>
<a href="#">Dan Ford</a>	<a href="#">Jeff Hazeltine</a>	<a href="#">Melissa Stone</a>	<a href="#">Tom Sullivan</a>
<a href="#">David Araldi</a>	<a href="#">Jessica Ross</a>	<a href="#">Michael Toscano</a>	<a href="#">Tracy Terrell</a>
<a href="#">David Brolsma</a>	<a href="#">Jim Agar</a>	<a href="#">Paul Swart</a>	<a href="#">Tres Thompson</a>

Andersen Alumni Association

## Congratulations and Best Wishes Andersen Group Inc.

**Andersen Alumni Association** — Former Arhtur Andersen Enterprise Group Manager, Founder of Andersen Alumni Association and Partner Cardinal Points Group

December 17, 2025 was a historic day for Alumnus Mark Vorsatz and the entire team at Andersen Group Inc. ("Andersen") as they rang the bell at the New York Stock Exchange with a successful initial public offering. A 23 year journey in the making, Andersen is now listed on the New York Stock Exchange (NYSE) under the symbol "ANDG."



Alumni can watch Mark's interview with the NYSE as he lays out the Firm's 2026 game plan by clicking [here](#)

*Warren R. Turner*

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*Warren Turner* is fractional C-Level Executive and partners with technology OEMs and their channel ecosystems to help business owners and leadership teams drive profitable growth, transformation, and strategic clarity. His work spans M&A, branding, talent, and new business development, supported by globally taught methodologies he has authored to help leaders build durable, high-performing organizations. In 1998 he founded the [Andersen Alumni Association](#)™

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# **Beyond the Gym & Budget: Five Resolutions for Richer Relationships in the New Year**

**Ralph Schonenbach** — Former Consultant Andersen Business Consulting, Founder and CEO of Meerkat, Inc.

As the calendar flips to a new year, our thoughts often turn to personal goals: fitness, finances, new skills. But what about the intricate web of connections that truly enrich our lives? This year let's broaden our view and dedicate some intentional energy to our relationships – with ourselves, our inner circle, and our wider community.



Here are five resolutions to foster deeper, more meaningful connections in the year ahead:

## **1. Nurture Your Inner World: The Foundation of All Connections**

It might seem counterintuitive to start a "relationship" resolution with yourself, but it's foundational. Your mental and physical well-being directly impacts your capacity to connect, empathize, and engage with others. You can't pour from an empty cup. This year, prioritize sleep, mindful moments, regular exercise, or hobbies that genuinely recharge you. When you feel centered and whole, you bring a more vibrant, patient, and present version of yourself to every interaction.

## **2. Relationship Housekeeping: Declutter & Rebalance Your Connections**

Just like a closet needs tidying, our relationship landscape benefits from a refresh. Take a moment to reflect: Are your relationships balanced? Do you consistently find yourself being the proactive one, always reaching out or making plans, while receiving minimal reciprocation? It's time for a reset. Prioritize those relationships that feel reciprocal and energizing. For those that feel out of balance, consider having an honest, open discussion about your needs and expectations. Sometimes, a difficult conversation can lead to a stronger bond; other times, it clarifies where to best direct your precious energy.

### **3. Welcome Fresh Perspectives: Expand Your Circle**

Our existing relationships are invaluable, but new voices bring new ideas, challenges to our assumptions, and unexpected joy. Make a resolution to meet new people this year. Join a club, volunteer for a cause you care about, attend local events, or simply strike up a conversation with someone new in your daily routine. Adding fresh perspectives to your social mix can broaden your understanding of the world, introduce you to new interests, and spark invigorating conversations.

### **4. Practice Intentional Kindness: Sprinkle Joy Unexpectedly**

The power of a small, unexpected gesture cannot be overstated. This year, embrace more random acts of kindness. Surprise someone with a thoughtful reach-out, a handwritten note, or a small favor they didn't ask for. Make a conscious effort to offer genuine compliments more frequently. Be the friend, colleague, or family member you wish to have – attentive, supportive, and kind. These little acts accumulate to create a significant positive impact on your relationships and the world around you.

### **5. Elevate Your Community: Be a Beacon of Support**

We are living through a challenging period, and many people are experiencing stress, isolation, or hardship. Make it a resolution to be more aware and conscientious in your community engagement. Look beyond your immediate circle. Engage with people who look like they could use a helping hand, a kind word, or a listening ear. This isn't about grand gestures; it's about being present, empathetic, and willing to connect with genuine care. Lifting up others not only strengthens community bonds but also enriches your own sense of purpose and connection.

These resolutions aren't about adding more tasks to your plate; they're about cultivating a richer, more connected life by intentionally tending to the relationships that matter most.

## *Ralph Schonenbach*

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*Ralph Schonenbach* is an entrepreneur, author, and relationship expert with over two decades of global experience. As the author of [\*Relationships Matter\*](#), he offers practical strategies to foster meaningful connections, combining deep personal insights with actionable advice. With a strong consulting, leadership, and product development background, Ralph has helped individuals and organizations enhance their networks and achieve lasting success. Passionate about personal and professional growth, he enjoys writing, international travel, and meeting new people, continuously advocating for the power of relationships in creating impactful opportunities.

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## Choosing Authentic Connection in a Noisy World

**Warren Turner** — Former Arthur Andersen Enterprise Group Manager Founder of Andersen Alumni Association™ and Partner at Cardinal Points Group

Today, we are all caught up in life's busyness and chaos. Signals are louder, messages are faster, and it is increasingly difficult to separate what is real from what is manufactured. False actors exist. Artificial intelligence can imitate insight, credibility, and even familiarity—but it cannot replace judgment, character, or earned trust.

What has not changed is the value of authenticity.

Trust is not built through algorithms or volume. It is forged through simple, intentional actions—taken consistently over time. That discipline was ingrained in us early. It shaped how we evaluated information, how we spoke with clarity, and how we showed up—especially when it mattered.



In 2026, alumni engagement does not require a title, a committee role, or a major time commitment. It requires presence, discernment, and the willingness to engage directly. Participation may look like:

- Posting a job opening or sharing an opportunity before it becomes public
- Referring a fellow alum with confidence, context, and firsthand knowledge
- Vetting resources—advisors, service providers, partners or solutions—so others can engage with clarity and trust

- Making thoughtful introductions where there is genuine fit, not convenience
- Contributing thought leadership grounded in real experience—not noise
- Sharing major career milestones: new roles, promotions, board appointments, or entrepreneurial ventures
- Encouraging an alum stepping into a new opportunity or navigating change
- Showing up—to events, conversations, and one-on-one connections

Each of these actions cuts through distraction.

Each interaction strengthens the cohort and

Each exchange compounds trust.

The Andersen Alumni Association provides the platform. But the strength of the Association is created—and protected—by alumni who choose clarity over spin, substance over speed, and relationships built on credibility that endures.

Iron sharpens iron.

And a cohort of trust is built—one authentic interaction at a time.

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*Warren R. Turner*

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Warren Turner is fractional C-Level Executive and partners with technology OEMs and their channel ecosystems to help business owners and leadership teams drive profitable growth, transformation, and strategic clarity. His work spans M&A, branding, talent, and new business development, supported by globally taught methodologies he has authored to help leaders build durable, high-performing organizations. In 1998 he founded the Andersen Alumni Association™

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## Regrets

**Todd Dewett** — Andersen Alumnus, author and speaker

Yes, you want them. Just stay with me.

It's such a stained, tainted word, right? To regret is to feel bad about something that you did or were a part of doing. It could be a missed opportunity, a mistake, a failure, or a moment where you revealed yourself to be too selfish or ambitious or uncaring.

People who say they don't have regrets are either boring and uninteresting or full of it.

First, is it possible to be safe enough, boring enough, careful enough to never have a regret? Simply based on the random nature of life, no way. Even the most prepared, thoughtful, and careful person will end up with a few regrets.

Second, most people are just lying. Regrets imply failure and we're trained to deny failure at all costs. That's of course sad, since failure drives learning and is essential to eventual success. So, given the stigma, we deny regrets and tell others we have lived something closer to a flawless life as opposed to a more imperfect regret-filled life.

Bunk. It's normal to have regrets. Research suggests that most adults have 3-4 major regrets (and lots of minor ones). And I suggest it's good to have regrets! Kinda. Think of it this way:

If you have the minimum possible number of regrets based on safe boring behavior, well that's common – enjoy being mediocre. This is 1-2 major regrets. Maybe one happened due to your actions. The other one was random.

At the other extreme, if you have a very above average number of regrets, let's say 5-6 or more, you've got issues. That's clearly too much. You're a good candidate for therapy and / or coaching (aren't we all...). You may in fact have trouble staying employed. Bigtime decision making is challenging for you and figuring out why sooner than later would be smart.

However, if you're in the middle with 3-4 major regrets – that's normal. The real question is what have you learned? The people in this group who choose to think, learn, and grow – they prosper. The rest of them end up in the 5-6+ group eventually.

Think of it like marriage. The divorce statistics are horrible. Over 50% of first marriages fail, over 60% for second marriages, and over 70% of third marriages. Scary, but try to focus on explaining successful second (or even third) marriages. In short, these are people who chose to learn, grow, and make better decisions. As a result, this wise group makes better choices about the people they marry, and they

thoughtfully engage that person far more productively than they did in the last marriage.

Regret is often just a type of failure. Use it, don't be merely stigmatized by it. Look in the mirror and really think about why it happened, how you contributed to it happening, and what you'll do differently moving forward.

Marriages, leadership decisions that impact many, career decisions that might make or break you – they are all the same at some level. The harder you push to excel and move forward, the more likely a regret might emerge. You're imperfect, not a genius, tired, have bad moments, etc. – regrets happen!

But if you learn from them, you just might become a better, more successful person. Long live regret.

*Dr. Todd Dewett*

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*Dr. Todd Dewett* is one of the world's most watched leadership personalities: a thought leader, an authenticity expert, best-selling author, top global instructor at LinkedIn Learning, a TEDx speaker, and an Inc. Magazine Top 100 leadership speaker. His recent book "Dancing with Monsters" is available on [Amazon](#). Todd can be reached at [todd@drdewett.com](mailto:todd@drdewett.com)

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# Executive Search: Insights on Bridging HR and Recruitment

**J. James O'Malley** — Former Andersen National Director of Experience Recruiting, Jim is Managing Director at Kensington International Executive Search

The executive search industry is often enriched by professionals who previously excelled in corporate roles, particularly within the human resources (HR) field. This dual perspective equips them with a unique understanding of recruitment dynamics. I count myself and several of my colleagues among these seasoned professionals.

During my time in HR, I not only developed robust infrastructures for strategic workforce planning but also honed a deep appreciation for the intricacies of quality recruitment. This foundation has significantly shaped my approach to executive search, offering valuable insights into fostering stronger partnerships between HR and recruitment firms.

## A Unique Transition: From HR to Executive Search

Reflecting on my career, I would emphasize how my HR experience has informed my approach to executive search. Most of my career has been spent on the other side of the table. As an HR executive, I worked with numerous executive recruiters, from large firms to specialized boutiques. That experience gave me a solid understanding of what clients expect — their issues, concerns, and priorities. At all the firms I have worked for, this client-centric mindset is a cornerstone of our methodology. When we built our retained search capability, we focused on our clients' expectations, this includes offering a fee structure that is more performance driven than our competition.

## Building Effective HR-Search Partnerships

I believe the relationship between HR and external recruiters thrives on strong communication and execution. Here are six key strategies to optimize collaboration:

1. Clearly identify any areas requiring confidentiality during the search process.
2. Provide timely feedback, ideally within 48 hours, on all aspects of the assignment.
3. Schedule candidate interviews promptly and share feedback without delay.
4. Share information about internally or externally sourced candidates for a comprehensive evaluation.
5. Offer candidates detailed insights into the company's culture to facilitate informed career decisions.
6. Establish a communication strategy to track search progress, marketplace intelligence, and next steps, with weekly check-ins as a standard practice.

Communication is the foundation of successful partnerships, and these steps foster mutual understanding and efficiency.

### **The Rise of Internal Executive Recruitment: Opportunities and Challenges**

As many organizations build in-house recruiting teams to streamline hiring processes, we see both potential and pitfalls. The success of internal executive search capabilities varies widely. While some organizations achieve notable results, others struggle due to a lack of clear strategy, unrealistic expectations, or poorly defined responsibilities. We advise companies to evaluate in-sourcing versus outsourcing by considering five critical factors: cost, output, speed and focus, cultural alignment, and strategic impact. Both approaches have merits, but they must align with the organization's broader goals and resources.

### **The Role of Culture in Recruitment**

When discussing cultural alignment in hiring, we acknowledge that this can sometime be a challenge for external recruiters. In-house recruiters often have a natural advantage in understanding company culture. However, experienced search firms work diligently to bridge this gap during the intake process. And many of us go a step further by providing additional on-boarding support. We warn our clients against firms that fail to prioritize cultural insights. If external recruiters aren't asking the right questions about your culture, it's a red flag. Look elsewhere for a partner who will. I am proud of my dual expertise in HR and executive search, which exemplifies how cross-disciplinary experience can elevate recruitment practices. By fostering open communication, prioritizing cultural understanding, and offering tailored solutions, we demonstrate the potential for transformative partnerships between HR and search firms.

*J. James O'Malley is a Managing Director with Kensington International and a seasoned executive with over 30 years of experience. He is an expert recruiter, providing top talent for leading private equity, healthcare, professional, and financial services firms. His search work includes C-suite executives and Board of Directors. Jim has served Private Equity and their portfolio clients across all industries in addition to his background with Management Consulting firms, Architecture, Engineering, Accounting, Tax and Law firms in addition to IT, Healthcare, Operations and Supply Chain consultancies. He also helps large Commercial, Consumer and Private Banks with their hiring needs. Jim can be reached at: [jomalley@kisearch.com](mailto:jomalley@kisearch.com)*

*J. James O'Malley*

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# How to Get the Most Out of Your Executive Advisor

**Jennifer Eggers** — Andersen Alumnus and Founder & President of LeaderShift Insights®

After more than 30 years advising senior executives, I've noticed something: a handful of clients consistently get outsized value from me — not because they're better leaders, but because they show up differently. They approach their advisor the same way they approach a high-stakes business challenge: prepared, intentional, and focused on outcomes. And because of that, their progress accelerates faster than anything a "traditional coaching model" could deliver.

If you're thinking about working with an executive advisor — or you've already made the investment and want to make sure you get every ounce of value out of it — here's the truth in kitchen-English: You get out what you put in. And with a good advisor, you can get a lot.

## The Leaders Who Get the Most Value Come Prepared

The best clients don't show up asking, "So, what should we talk about today?" They show up with something real on the table.

They send me materials in advance — presentations, strategy docs, emails to their board chair, a draft team structure — not because I need homework, but because they want to use our time to move something forward, not just "reflect."

For example:

- A new business unit president once sent me his entire org chart and asked, "How do I restructure this to actually deliver on the strategy my boss expects in the next 18 months?"  
That's not a theoretical question. That's advisory work.
- Another leader prepping for a high-stakes meeting with her boss and her team asked me to role-play different opening frames so she could land the message with confidence and credibility.  
Again — advisory, not theory.
- I've had more than a few clients walk into a session ready to talk through how to exit a poor performer with dignity, or how to develop a high-potential leader who needs a very different kind of support.

When you come prepared with something specific — a situation, a decision, a draft, a relationship dynamic — I can roll up my sleeves and help you build the plan, the message, or the approach. That's the advantage of having an experienced advisor who can think with you, not just ask how you *feel* about the problem.

## The Second Group Who Gets Exceptional Value: The Ones Who Take Goals Seriously

This may sound obvious, but you'd be surprised how many leaders set coaching goals and then never look at them again.

The most successful clients treat their goals like a strategic plan for their own leadership. After we debrief their assessment and stakeholder feedback, they get incredibly clear about what they need to shift and why it matters. Then they actually *use* those goals to guide every session.

If a leader needs to strengthen how they create alignment, we mine their calendar to find opportunities to practice that skill — on Thursday's product review, in next week's board pre-read, or in a conversation with a direct report who always seems out of sync.

If someone needs to get better at leading through ambiguity, we don't talk about "mindset" for an hour. We pick a real situation where ambiguity is causing friction, and we build the playbook to lead through it.

The leaders who make the biggest leaps don't treat goals like décor. They treat them like commitments.

### **One Story That Says It All**

Years ago, I worked with a senior leader stepping into a role where the stakes were incredibly high — new business model, new team, and a board watching closely.

On day one, he said, "Jennifer, I want you inside the real work with me." And he meant it. He sent me drafts of strategy decks before they went to the CEO. He looped me into tough personnel decisions. He came to every session with a clear outcome in mind. When we set goals, he treated them like marching orders, not suggestions. He wasn't looking for a purely Socratic coach; he wanted an advisor in the trenches with him. He grew faster than he thought possible — and his organization felt the impact within months. That's the difference preparation and intentionality can make.

### **If You Want More From Your Advisor, Do This**

#### **1. Show up with something specific.**

A situation. A decision. A relationship dynamic. A draft. A concern. A hoped-for outcome.

#### **2. Send context in advance.**

Presentations, notes, emails, team structures, meeting agendas — whatever will help your advisor get up to speed so your session is about action, not downloading.

#### **3. Take your goals seriously.**

Treat them like commitments. Use them to focus your time. Look for real opportunities to practice.

#### **4. Be willing to role-play.**

The board conversation. The team message. The hard conversation with a direct report. Reps matter.

## 5. Be open to challenge.

A good advisor won't just validate you. They'll push you — with data, with feedback, with real-world experience.

### The Bottom Line

A strong executive advisor will give you more than reflection. They'll help you think, plan, communicate, restructure, influence, align, and navigate disruption — with speed and clarity.

But only if you use them fully.

**If you're ready to get the most out of an executive advisor, call us. It's what we do.**

*Jennifer Eggers*

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**Jennifer Eggers** is a President of LeaderShift Insights, Inc., c-level advisor and author of International Best-Seller, "Mastering The C-Suite Mindset: The senior leaders playbook to build a c-level mindset, command respect and lead an enterprise." The book is based on 30 years of patterns observed while working with and coaching C-Suite leaders across 17 countries and over 20% of the Fortune 500. She works with leaders and organizations going through disruption to improve their capacity to adapt.

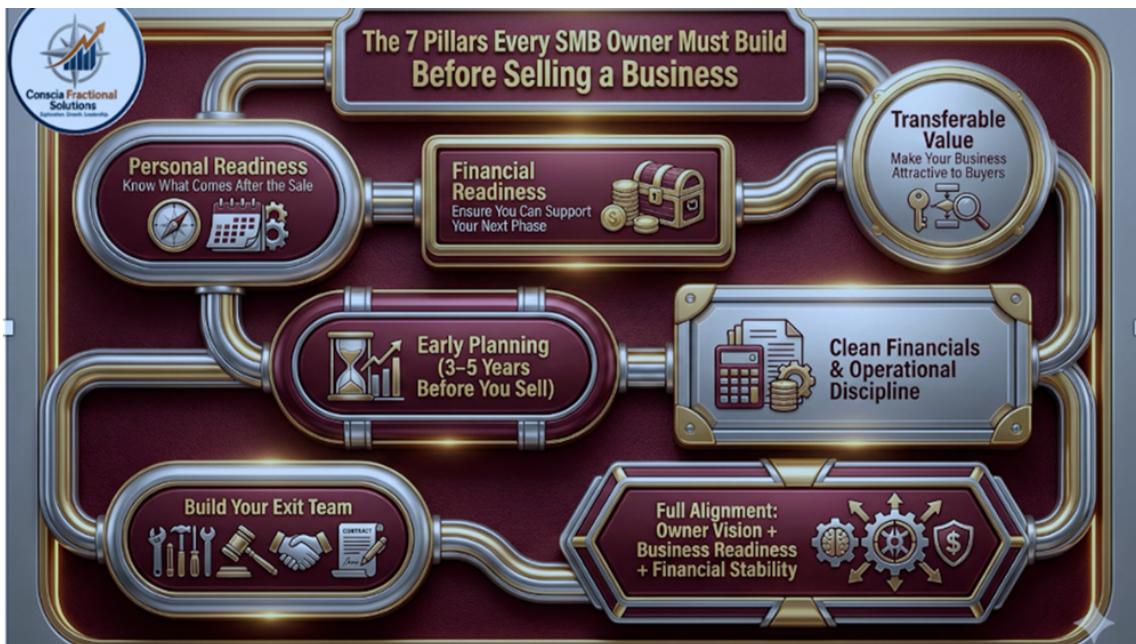
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# Your Future Is Calling: The 7 Pillars to Master Your Business Exit

Robb Thomas — Former Arthur Andersen Bankruptcy/ Turnaround Consultant

**The most important transaction of your life requires the most deliberate plan.**

Building a successful business is a monumental achievement, but the eventual sale is often the most significant financial event an entrepreneur will ever face. Too often, owners wait until an offer arrives, missing years of critical preparation time that could have maximized their value and mitigated taxes.



At The Fractional Frontier, we believe preparation is the ultimate value-driver. We've distilled the essential steps into **The 7 Pillars Every SMB Owner Must Build Before Selling a Business**. These pillars ensure your exit is not just a transaction, but a strategic, legacy-fulfilling achievement.

## **Pillar 1 Personal Readiness: Know What Comes After the Sale**

The financial value of a sale is only useful if it supports your life goals. This pillar focuses on defining your "why" before you focus on the "how."

- **Highest Priority: Define Your "Why" and Use a Personal Financial Plan.** Get brutally honest about your motivations for selling (freedom, a new venture, retirement) to strengthen your position in negotiations. Work with your financial advisor to **quantify the net proceeds you need** to live the life you want. This becomes your financial target, or your "number."

- **Important: Assess Your Wealth Surplus.** Determine how much wealth, if any, will be left at the end of your life *after* meeting your financial goals. This factor informs and unlocks the potential for advanced tax mitigation strategies.

***Once your personal compass is set, you can align your financials to meet your goals, which brings us to Pillar 2...***

### **Pillar 2 Financial Readiness: Ensure You Can Support Your Next Phase**

Tax mitigation and long-term wealth strategy are the core elements here, designed to maximize your take-home proceeds and secure your future.

- **Highest Priority: Implement Pre-Transaction Tax Mitigation Strategies.** There are far more opportunities to save in taxes *before* a transaction than after. Starting early allows you to use sophisticated strategies like gifting and strategic structuring to preserve more of your business value. Work with your team to conduct a **Tax Mitigation Analysis** to model the potential tax savings of each strategy.
- **Important: Develop a Post-Sale Wealth Preservation Strategy.** Once the sale proceeds are received, the focus shifts to strategic asset allocation, investment management, and **legacy planning** to ensure your wealth lasts and continues to grow according to your long-term values.

***These financial foundations need years to mature, emphasizing the importance of Pillar 3...***

### **Pillar 3 Early Planning (3-5 Years Before You Sell)**

This is the window for strategic positioning, ensuring you have the maximum leverage when it's time to sell.

- **Highest Priority: Establish Investment Banking Relationships Early.** Developing rapport with investment bankers months or years in advance provides invaluable guidance on **market conditions** and helps you identify which parts of your business require strengthening to appeal to buyers.
- **Important: Commit to a Proactive Sale Process.** A proactive sale, led by a seasoned investment banker, involves strategically creating **competitive buyer tension** to optimize price, terms, and cultural fit. This is always superior to reacting to an unsolicited offer.

***While you plan the timeline, you must simultaneously build the core attribute buyers seek transferable value...***

### **Pillar 4 Transferable Value: Make Your Business Attractive to Buyers**

Buyers pay a premium for a business that can run without the owner. This is about transforming "owner-dependent" value into "**transferable**" value.

- **Highest Priority: Assess and Close Sellability Gaps.** A sellable business is one with **clean financials**, documented and repeatable systems, transferable client relationships, and a strong management team. Identify and fix any area where the business is too reliant on you—a key factor for attracting serious offers.
- **Important: Prepare a Quality of Earnings (QoE) Report.** Engage a CPA to conduct a QoE. This report rigorously aligns your financial statements (emphasizing EBITDA, or earnings before interest, taxes, depreciation, and amortization) to validate your earnings and financial sustainability.

***Transferable Value is rooted in the meticulous detail of your operations, which requires strong operational discipline...***

#### **Pillar 5 Clean Financials & Operational Discipline**

Buyers hate surprises. This pillar is about ensuring a smooth due diligence process by tidying up your legal and financial records in advance.

- **Highest Priority: Get Your Legal House Ready Through Reverse Due Diligence.** Hire a seasoned M&A attorney to conduct a **reverse due diligence** on your own company. This identifies and remedies potential issues related to contracts, IP, compliance, or ownership structures *before* they can reduce your value.
- **Important: Ensure Financial Transparency and Consistency.** Make sure your internal accounting practices are consistent, transparent, and defensible. Clean financials instill confidence, which translates directly into favorable deal terms.

***No owner can tackle these complex issues alone; you need a coordinated team of specialists...***

#### **Pillar 6 Build Your Exit Team**

Selling a business requires a coordinated group of specialists. Your success depends on the synergy of this team.

- **Highest Priority: Establish a Financial Advisor Relationship (The Head Coach).** Choose an advisor who specializes in business exit planning. They serve as the "**head coach**," coordinating the strategic conversations and aligning the efforts of the other professionals (CPAs, attorneys, bankers).
- **Important: Assemble and Coordinate Your Core Collaborative Team.** Bring together your key professionals—financial advisor, M&A attorney, CPA, and investment banker—to ensure unified,

thoughtful, and coordinated advice across personal, legal, tax, and business matters.

***The final pillar brings all components together to ensure your exit is executed with confidence and control...***

### **Pillar 7 Full Alignment: Owner Vision + Business Readiness + Financial Stability**

This is the final checkpoint, ensuring all parts of your plan are in harmony and preparing you for the crucial negotiation phase.

- **Highest Priority: Develop a Protocol for Handling Unexpected Buyer Inquiries.** Decide in advance how you will vet the buyer, control the flow of confidential information (a slow reveal), and manage the initial conversations to protect your leverage and value.
- **Important, but Lowest Priority: Learn Negotiation Basics.** While your investment banker will lead the process, a basic understanding of deal flow and common buyer tactics will help you stay calm and avoid being surprised when the stakes get high.

### **Your Next Step**

Exit planning doesn't need to be overwhelming. The best time to start is now, taking the highest priority action in each of these pillars.

*Rob Thomas*

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*[Robb Thomas](#) is a Seasoned Fractional CFO with over 25 years of hands-on experience across SaaS, healthcare, real estate, and service industries. He is the Author of *The Fractional CFO Playbook* a no cost copy of which can be downloaded [here](#).*

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# **The Real Crisis Isn't AI. It's Integrity. Why leaders must reimagine integrity as wholeness in a divided, disrupted world**

**John Blumberg** — Andersen Alumnus and author of *Return On Integrity*

Leaders at the top don't need another trend report. You can feel it in real time: the nation's division doesn't stay "out there." It walks through the front door every morning. It shows up in team meetings, hiring decisions, client relationships, board expectations, and the quiet fatigue of people trying to stay productive while avoiding one more cultural land mine.

And then there is AI. Not as a tool. As an accelerant.

We haven't chosen these times; these times have chosen us. The question is whether we will deliver a response - or default to a reaction.

AI is not simply changing workflows; **it is changing the rate of change.** It is exposing what organizations have always tried to manage with performance, compliance, and culture slogans: the deep human need to belong, to matter, to be safe, and to be seen. When those needs go unmet, division doesn't require ideology. It requires only pressure.

**Whisper of Integrity:** *The sole pursuit of more results in a soulless destination of less.*

The leadership dilemma right now is not that you lack strategies. It is that most organizations are trying to solve a wholeness problem with fragmented tools. Policies. Programs. Values posters. Training modules. More "alignment." Another initiative to "drive engagement." It can all look impressive and still leave people internally split.

Because the crisis you are navigating isn't primarily political, technological, or operational.

**It is integrity.**

Not the version of integrity most of us inherited. Not integrity as a moral badge. Not integrity as "being good." Not integrity as "never messing up." Not integrity as compliance, perfection, or image management. That old definition quietly teaches people to split: to perform, to hide, to posture, to judge, to shame, **and to fear being found out.**

That is not leadership. That is survival. And survival is expensive.

Integrity, in its deepest sense, is not a standard you enforce. It is a state you live from. Integrity is whole. Entire. Undiminished.

**It is an interior integration that becomes an exterior way of leading.**

When leaders reduce integrity to right versus wrong, organizations become moral courtrooms. People learn what is safe to say, what is risky to admit, what to hide, and how to stay out of trouble. The culture can become compliant on the surface and quietly cynical underneath.

Reimagined integrity is different. It doesn't begin with behavior. ***It begins with wholeness.*** And wholeness has a telltale sign: people can show up without splitting into parts - the part that performs, the part that pretends, the part that withholds, the part that complies outwardly while quietly quitting inwardly.

Here is why AI matters so much in this conversation: ***AI will magnify whatever is already true in your culture.***

If you have trust, AI can extend it. If you have fear, AI will automate it. If you have clarity, AI will scale it. If you have fragmentation, AI will accelerate the fracture.

Technology and machines do not have core values; only humans do. AI can make processes more productive, but it cannot make a workplace more human.

**That requires leaders who choose wholeness - and invite wholeness.**

AI doesn't just disrupt business models. It reveals human models. It shines a light on the gap between stated values and lived values - between what leaders say matters and what leaders actually reward.

Most leadership teams underestimate the subtle drift created by speed and measurement. In a world that can measure almost everything, the "what" can start driving the "how." Metrics can become the new core values if leaders don't intentionally anchor measurement to values first. When results are rewarded without reverence for how those results are achieved, good people drift under pressure - and eventually, cultures do too.

**Whisper of Integrity:** *Goodness is never achieved at the expense of another.*

This is where personal responsibility becomes unavoidable. Integrity is not primarily an organizational project.

**It is a leadership practice.**

Leaders can't outsource wholeness to HR, or Marketing's branding and communications. Core values are not a veneer. They are not a campaign. They are not a poster. They are the foundational design of leadership itself, and they demand more than a few hours of attention. They demand your full attention - ***because they demand all of you.***

And this is the paradox: in times of division and disruption, leaders often reach for more control when what is most needed is more depth.

Depth is not softness. It is strength. Depth is what allows you to deliver a response rather than a reaction. Depth is what allows you to hold paradox without collapsing into polarization.

**Depth is what allows you to make hard decisions without becoming hardened.**

Reimagining integrity as wholeness does not remove accountability. It restores it. It creates the only accountability that can endure: the accountability of alignment between who you are, what you value, and how you lead - especially when pressure rises.

What does Return on Integrity look like in practice? It looks like leaders who tell the truth sooner - because they are not punished for being human. It looks like teams that can name tension without needing an enemy. It looks like decisions made from clarity, not reactivity. It looks like measurements and rewards that are consciously shaped by values, not allowed to quietly replace them. It looks like cultures that don't outsource their conscience to policy.

And it looks like leaders who are willing to do the inner work first - because they know the condition of the organization cannot exceed the condition of the leadership.

**Whisper of Integrity:** *Integrity is not about taking you somewhere ... although it will.*

*It is about opening your eyes right where you are.*

So here is the invitation: before you ask people to navigate AI, uncertainty, and cultural division, ask a more foundational question: **Are we leading from wholeness - or from fragmentation dressed up as competence?**

If you choose the old definition of integrity, you will eventually pay for it - in talent, trust, health, and meaning. But if you reimagine integrity as wholeness - whole, entire, undiminished - you won't just "manage change." You will become the kind of leader who can remain integrated while everything around you accelerates.

In a disrupted world, that may be the most strategic advantage left.

*John Blumberg*

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**John Blumberg** is a champion for integrity in an age dominated by performance metrics. As a national keynote speaker and author of four transformative books, including the renowned "[Return On Integrity](#)" series, his mission is to distill clarity from the noise and foster authentic leadership. As always, I'd love for you to share your thoughts! We could all benefit, if you would be so kind to share your thoughts email me at [John@BlumbergROI.com](mailto:John@BlumbergROI.com)!

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## New Book Release: Garden Adventures: The Tales of an Arctic Fox, A Daddy-Long-Legs and their friends

**Peter Warner** — Andersen Alumnus

Full of heart, humor, and surprising twists, Garden Adventures tells a story of courage, friendship, and the magic that can bloom in the most ordinary places. It begins in a quiet English garden where animals and insects live side by side: Orabella and Winston, two lively parakeets; Cassian, a wise old fox; Cornelius, a brave daddy-long-legs with an injured wing – just to name a few.



When Charles, the owner of the house and garden, rescues an arctic fox, a new magical chapter begins. From cozy tea times beneath a monkey puzzle tree to a daring journey deep underground, the garden friends discover how far courage, kindness, and friendship can take them.

Along the way, you'll meet many wonderful characters:

Edgar, the snail who keeps losing his home. Lucan, the thoughtful tortoise. Corkabus, the mightiest spider in the world. Raw, the glowing firefly. Troy and Isaac, Cornelius' curious grandchildren. And there is even a dinosaur or two.

As friendships are tested, new bonds are formed, and bravery is needed, the garden becomes a stage filled with magic, warmth, and adventure.

Garden Adventures is a heartwarming story for anyone who loves animals, imagination, and the special kind of magic that appears when friends stand together.

Wishing you a wonderful reading experience – and thank you for being part of this journey.

The book is available on [Amazon](#).

*Peter Warner*

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**About the Author:** [Peter Warner](#) is a first-time author who, until May 2023, worked in a Professional Services Firm. During countless evenings and weekends spent travelling extensively — often amid flights and delays — he found solace in writing. Inspiration for his debut book came from a house he once lived in, which had a 'cold room' inhabited by spiders and insects. In the garden, a beautiful Monkey Puzzle tree was visited daily by a pair of green parakeets, while an old red fox often slept beneath it. These small details sparked the idea for Garden Adventures. The story took shape thousands of feet in the air, as Peter wrote during his many journeys. Writing became his sanctuary — a place of complete freedom. The characters he created became his companions, their lives intertwining with his as he brought their world to life.

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## Renew or Reconnect

**Ed Maier** — Former Andersen Partner

Happy New Year to all of you! I hope you had a wonderful Christmas and are looking ahead to what you will accomplish in 2026!

As you open the New Year and ponder the goals you set for yourself, why don't you consider the following as one possible goal? Is there a person from your near or distant past that you knew very well but that you have not seen or heard from in a good amount of time? Have you drifted apart because changes in life, work or social circles no longer include them--perhaps from something as simple as a move to a new location? Could the reason you have not reconnected be that your parting was over a negative or acrimonious reason? If you have experienced a situation like this with someone, why not take the first step to reconnect with them?

If you parted amicably with the one with whom you wish to reconnect, your step can be as simple as sending a text or an email seeking to reconnect.

On the other hand, is the person you think about someone with whom you had a split that was less than friendly? Are you concerned that if you reach out to them, it will be awkward or uncomfortable. But how are you going to know that if you don't give it a try? Time is a great healer of wounds. And, after all, this suggestion is not about realigning yourself with someone you never respected or liked. It is simply about rekindling a relationship that, for whatever reason, may have soured over the years and caused you to lose contact. If you have not had regular contact with someone over a long period of time, it is a simple first step to send an email or a text that says something like this: "I thought about you recently and wondered how you are doing? I hope you are well. Would you be interested in having a call some time to reconnect? I would certainly enjoy doing that."

If you think this would be a good idea, but are uncertain how to begin the process, consider these possible re-engagements:

- Is this someone that you worked with and admired, but you have just lost touch over the years? Not all these conversations have to be focused on someone with whom you have had disagreement or dissatisfaction. It might very well be that the passage of time has just distanced you more than you have realized.
- Is the person someone you remember with whom you might have had an unfinished conversation or meeting? One possible opening might be: "I remember the last time we met, we were discussing "this matter of import between us''. I never followed up to see how it was resolved. Would you care to re-open the conversation, or if not, just reconnect?

- Was there anger between the two of you that caused you to drift apart? How has the passage of time affected that anger? When you reflect on the situation, was the anger even real in the first place? “I remember when we last spoke, we had a pretty strong disagreement on the issue of...”. In retrospect, our relationship means more to me than being clouded by one issue. I would like to re-engage no matter what the outcome of that item was.

And remember, your re-opening message does not need to be a complicated one. It doesn’t even need to relate to the prior connection that was broken. The message doesn’t have to be eloquent or long. And it is okay if the other person doesn’t respond, responds cautiously or is not ready to respond. Your sincere attempt to reconnect is still meaningful, regardless of the outcome.

As we approached the holidays recently, I had a couple of situations arise which provoked me to begin thinking about this. There have been some past friends and colleagues that—for whatever reason—time, distance, change in circumstances, disagreement, frustration at the time—I have not made a connection in many years. They weren’t people I had “split” with in any way. They are just folks with whom I have lost touch. But after such a long period of time, I can assure you that I was just a bit dubious about starting a conversation again. After all, what if, in fact, I had hurt or injured them in some fashion? Has the passage of time altered their perspective about our relationship in such a way that they would not want to reconnect? Would they be at all interested in reconnecting? It turns out that none of my concerns were real. Since recognizing these situations, I have re-opened a dialogue with some that I have not had contact with for a few years. It has been very satisfying and rewarding to do so.

Reconnecting is not hard to do. It is just that sometimes taking the first step to do so is the most challenging. What if they don’t want to reconnect? When you think about it, it is no big deal really. If you didn’t have a connection for a long time and still cannot make a connection, you haven’t lost anything. You are still at breakeven. So, what do you have to lose? The opportunity to have a successful reconnection far outweighs the risk of failure. Go for it!

*Ed Maier*

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As always, I am interested in your thoughts. Feel free to write to me at [edmaier46@gmail.com](mailto:edmaier46@gmail.com). And, if you enjoy my writing, you can read more of it in my book ***Think Straight, Talk Straight***, which you can find on Amazon right [here](#).

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## Why Customer Experience Optimization Requires Cross-Functional Accountability

**Jim DeLoach** — Former Andersen Partner and Founding Managing Director at Protiviti. He is the author of several books and a frequent Forbes and NACD contributor.

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CX governance demands transparency in data collection, AI reliability in customer-facing applications and reputation risk management

Customer experience shapes brand perception and loyalty, but gaps prevent many organizations from optimizing performance effectively. Jim DeLoach of Protiviti examines findings showing that while 47% of executives view CX as extremely important, only 17% optimize it well, revealing a challenge that extends beyond marketing to encompass cross-functional accountability, data privacy compliance, AI governance and reputation risk management across customer-facing and back-office processes.

Customer experience, or CX, embodies a sharp focus on customers, across both business-to-consumer (B2C) and business-to-business (B2B) business models. It covers all actions aimed at meeting the needs of customers. It encompasses the processes that interact with them directly or indirectly with the intention of fulfilling their expectations, providing ease-of-doing-business and maintaining their loyalty. Over time, studies have indicated that CX affects customer loyalty more than brand, product or price.

CX drives business growth by shaping brand perception and loyalty with each customer interaction. From a strategic standpoint, a differentiating CX creates the multiplier effect of customer loyalty, which is the compounding, exponential growth that results from a satisfied customer's long-term engagement with and advocacy for a brand, yielding authentic referrals. For this reason, sustaining a distinctive CX is a business imperative, requiring executives to adapt quickly, seamlessly connect experiences, and update customer-facing and back-office processes to align them with the evolving expectations of both customers and employees. Agility is the name of this game.

The University of Oxford and Protiviti recently conducted a survey to understand business leaders' perspectives on the future of customer experience. The survey of 251 company board members, C-suite executives and other business leaders was conducted in March and April across North America, Europe and Asia-Pacific (APAC). Following are key findings:

- Nearly half (47%) of global executives are of the view that CX is extremely important to business success, but only 17% say their company is extremely effective at optimizing its performance.

- Almost three-quarters (70%) say they are confident that their company's leaders have a deep understanding of the needs, preferences and behaviors of the customers they serve.
- About two-thirds (64%) are confident in their company's ability to derive strategic and actionable insights from customer data and feedback.

When it comes to the overall customer experience, global business leaders seem confident they are getting it mostly right; however, their responses also reveal areas for improvement, particularly around their company's ability to optimize the effectiveness of CX performance.

### **The CX opportunity gap**

The University of Oxford and Protiviti recently surveyed 251 company board members, C-suite executives and other business leaders across North America, Europe and Asia-Pacific to understand business leaders' perspectives on the future of customer experience. The findings reveal a significant gap between CX aspirations and reality:

Nearly half (47%) of global executives view CX as extremely important to business success, but only 17% say their company is extremely effective at optimizing its performance. This 30-point opportunity gap between what leaders value and what they achieve presents a significant improvement opportunity.

Regional perspectives vary considerably. APAC business leaders express far more optimism and confidence in their CX strategies than their European counterparts, with North American executives falling in between. The opportunity gap ranges from 13 percentage points in North America to 43 points in APAC.

When asked where they excel most, executives ranked brand promise and personalization at scale first and second. As for where organizations fall short, omni-channel experiences and digital touchpoints topped the list. The good news: A strong majority (70%) of business leaders indicate they are confident their companies have a deep understanding of customer needs, preferences and behaviors. Armed with this awareness, it becomes a matter of execution from a channel and digital standpoint.

Regarding resources and readiness, two-thirds of business leaders assert they are confident their organization has the resources needed to manage effectively and improve CX performance. Over the past two to three years, 69% report an increase in investment in marketing resources, while 73% report increased spending on tools and technologies designed to enhance CX performance. Looking ahead, optimism grows: 85% expect increases in technology investment over the next two or three years.

A majority (57%) of business leaders report being confident that AI will improve their company's ability to advance its CX journey, with nearly a quarter saying AI will be either "impactful" or "extremely impactful" over the next two or three years. Surprisingly, those over 50 years of age were more bullish (64%) on AI than those under 50 (46%).

## **Closing the CX optimization opportunity gap**

The Oxford/Protiviti CX survey findings indicate that there is a CX optimization opportunity gap requiring the attention of business leaders over the next several years. It also suggests that not all leaders view CX as critical to their success; those leaders likely represent companies having little to no competition, a captive market or a business model involving little or no direct customer interaction. For example, they likely include monopolies and essential services (e.g., utility and telecommunication companies, healthcare and government services), businesses with non-customer-facing roles (e.g., data processing, warehousing and logistics) and B2B services (e.g., specialized manufacturing, cloud storage, and back-end software and infrastructure that compete on features, reliability and cost).

As for sectors prioritizing CX, a multipronged approach is needed across all facets of the CX lifecycle to close the optimization opportunity gap. Following are seven tenets to consider:

An “everyone is responsible” mindset with a focus on the “moments of truth” is a good start. Whether the model is B2B or B2C, market players must figure out what end customers want and drive their goals with an emphasis on the experience moments that matter — the “moments of truth.” Achieving growth through CX requires involvement from all functions, not just marketing. A unified vision aligns the organization with an obsessive customer focus. Data and analytics help identify needs, guide product and service design and inspire new approaches. Platforms and technology enable large-scale change through capability building and improved operations. Success is dependent on a full team buy-in.

CX is enhanced when customers can interact with a brand through multiple channels. If effectively integrated, physical stores, websites, mobile apps, social media and call centers offer a seamless experience without disruptions or loss of context. Information, preferences and history are consistent and accessible across all channels. Customers beginning an interaction on one channel (e.g., researching a brand’s offerings online) can continue it on another (e.g., purchasing in-store or via mobile), making their personal journey in interfacing with the brand more flexible and seamless. Consistent messaging and support strategies across omni-channels ensure that branding, communications and service levels remain consistent regardless of how or where the customer chooses to engage. Integration of data collected from various channels allows businesses to tailor recommendations, offers and communications to individual preferences and behaviors as well as facilitate faster issue resolution.

In effect, omni-channel strategies provide businesses with a holistic 360-degree view of customer interactions, helping them understand needs, pain points and preferences. The concept of anytime, anywhere service provides customers the freedom of choice in determining their preferred channel based on convenience, urgency and comfort, whether it is self-service online or face-to-face support. Omni-channel platforms make it easier to track and reward customer activity across all channels, encouraging repeat business and brand advocacy.

AI is revolutionizing CX personalization. The first signs of change in customer preferences are subtle. Market leaders gain advantage when they recognize those signs early and are positioned to adapt to change. By leveraging data and advanced analytics to tailor interactions, recommendations and services to individual customer preferences and behaviors in real time, AI is making personalization more effective. AI-powered recommendation engines can suggest products, content or services based on customer activity and historical data, enabling websites and mobile apps to adjust their layout, messaging and offers automatically for each visitor, creating a unique experience every time. AI-powered chatbots and virtual assistants provide instant, personalized support by understanding customer queries, accessing their history and offering tailored solutions 24/7. AI can analyze customer feedback and social media posts to gauge satisfaction and sentiment, helping brands respond with empathy and precision.

Digital touchpoints should meet customers where they are — online, offline or on mobile. These touchpoints often represent the first interaction customers have with a brand. A well-designed website or app can create a positive first impression that encourages further engagement. More importantly, the quality of digital interactions shapes customers' perceptions of the brand, influencing their overall experience and loyalty. Touchpoints provide opportunities for customers to give feedback, enabling brands to listen and respond to customer needs promptly with emphasis on instant resolution, if possible. Embracing new technologies and trends at digital touchpoints to create unique experiences that resonate with customers is a sure sign of innovation in the market.

CX innovations and enhancements keep the process evergreen. Managing CX is an ongoing process. Feedback mechanisms with customers can offer information about possible improvements to CX. Data analysis and predictive analytics support timely feedback, which may influence customer satisfaction and loyalty. Customer-facing AI applications provide personalized interactions, identify issues proactively and automate tasks to support efficient and relevant customer service. It is essential that these systems are properly trained to align with management's guidelines and maintain reliability in addressing common customer inquiries. As organizations evaluate these models for readiness and legal compliance, centers of excellence have emerged, and AI has been integrated into major content platforms.

Incentives underpin a customer-centric culture of shared accountability. They motivate employees, align organizational priorities and foster a culture that prioritizes customer satisfaction and loyalty. When designed thoughtfully, incentives encourage and reinforce behaviors and actions that prioritize customer needs and the delivery of exceptional service. They can be used to empower employees to identify and resolve customer pain points before they escalate; break down counterproductive silos and enhance collaboration across teams; and encourage suggestions for improving processes, products and services that positively impact CX performance.

Based on the company's goals and known customer preferences, appropriate incentives should be implemented to align everyone who matters to the desired outcomes and drive process or technology

improvements. Incentives tied to shared CX metrics encourage every function to contribute to the overall customer experience.

Outcome metrics include satisfaction ratings, retention rates, repeat business and net promoter scores.

Process metrics include first contact resolution, customer effort scores, customer churn rates, customer lifetime value and average resolution time.

The incentives structure should support a seamless operating model from the customer's perspective.

Compliance with laws and regulations governing customer interactions and data is table stakes. Whether general or industry-specific, data privacy regulations have proliferated across the planet and must be complied with to retain market permission to play. Wherever the company operates, everyone supporting CX directly or indirectly must be trained in data security and transparency compliance matters. Customer-facing processes and market offerings must support a compliant CX. Potential risks should be assessed and mitigated. For CX leaders, the end game is clear: Build transparency and trust with customers, manage reputation risk and avoid the embarrassment of fines, penalties and lawsuits.

### **Looking to the future**

CX will remain of vital importance in many sectors. Clear communications, transparency, easy account navigation, proactive updates, respect for preferences, personalization and world-class data management, all coupled with a commitment to continuous improvement, will enhance the customer journey. Timely and relevant messages delivered at points of need will be essential. A clear vision to align multiple parts of the organization toward a customer-centric focus will lay the foundation. Customer-focused data and analytics should facilitate a timely understanding of evolving needs and the design of relevant processes, products and services. AI and other technologies and platforms will drive further innovations and enable scalable growth through improved capabilities, responsible deployments, focused performance measures and established accountabilities for results.

For CX to be successful, everyone who matters should be on board. The bottom line: Customers will expect choice, and the companies that offer them integrated channel options are most likely to succeed.

*Jim DeLoach*

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*Jim DeLoach*, a founding Protiviti managing director, has over 35 years of experience in advising boards and C-suite executives on a variety of matters, including the evaluation of responses to government mandates, shareholder demands and changing markets in a cost-effective and sustainable manner. He assists companies in integrating risk and risk management with strategy setting and performance management.

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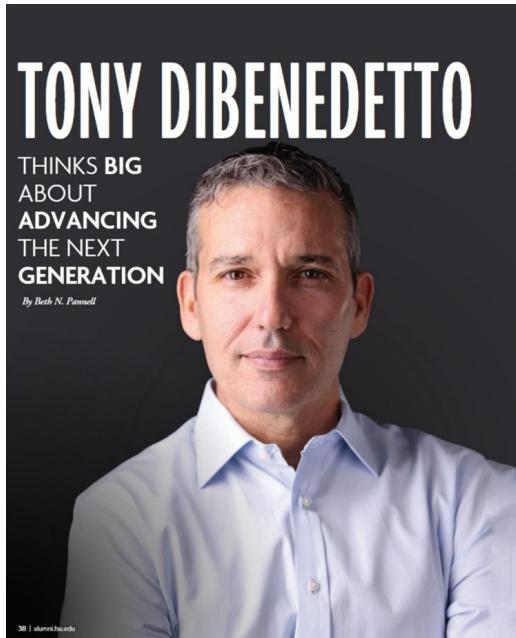
## Alumnus Tony DiBenedetto Thinks Big about Advancing the Next Generation

Florida State University Alumni Association

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It was a simple, but career-shaping question in seventh grade that put Tony DiBenedetto (B.S. '87) on a life-changing trajectory. *What do you want to be when you grow up?*

DiBenedetto was raised by his grandparents and suffered the sudden loss of his grandmother at age 12. Taken in for the summer by a family friend, John Lilly not only asked that pivotal question — but when DiBenedetto said he was interested in going to space, Lilly explained that computers ran NASA and encouraged him to explore the relatively new technology.



"In 1977, I couldn't tell you what a computer was," said DiBenedetto. "It wasn't prolific in our everyday lives, and I was like, 'yeah, I'm going to get into computers.' From seventh grade on, whoever would listen to me, I would say that I was going to do computers."

He didn't touch a computer until high school, when he was given an early TI99 computer and taught himself programming. But thanks to the encouragement and coaching he received over the next several

years — sometimes from unlikely places — he never let go of that vision.

### **Finding His Home at Florida State**

A spring break visit during DiBenedetto's senior year of high school left a lasting impression. Although he considered playing baseball at a smaller school, that visit, combined with FSU's programs in advanced math and computer science, ultimately drew him to Tallahassee.

As a first-generation college student who had experienced a challenging childhood and lived in about 15 different homes, DiBenedetto said he quickly found sources of support at FSU. His time at Florida State was shaped by advocates such as the Career Center's Dr. Bob Reardon and mentors such as Jeff Douglas and Pearly Rosier.

"He acted like I was his younger brother from the minute we met," DiBenedetto said of Douglas, a staff member at the Student Disability Resource Center computer lab where DiBenedetto was assigned work-study. "He was coaching me on all the dumb things I was doing and teaching me to be a young professional at 18."

While Douglas was like an older brother, Rosier served as a mother or grandmother figure. DiBenedetto had to work to pay his way through school, so he also held a job at the Career Center where Rosier worked. She took him under her wing and parented him throughout his time at FSU and beyond.

### **A Career Built on Gratitude and Mentorship**

DiBenedetto was part of the first class to graduate with a Management Information Systems (MIS) degree from the FSU College of Business — a program that combines business courses with technology. But his connection to FSU didn't end at graduation.

His dream job at Arthur Andersen led him to recruit FSU students, and DiBenedetto continued this talent pipeline into Tribridge, a technology company he later co-founded with Brian Deming and fellow Nole Mike Herdegen (B.S. '85, MBA '91). Over the years, DiBenedetto helped recruit thousands of FSU students and maintained strong ties with then Career Center Director Myrna Hoover and the university's career placement team.

"One of the cool things about my career is that I've been working with Florida State the whole time," DiBenedetto said. "I can trace so many of the relationships I have through the university. My gratitude for Florida State is really at an 11 on a scale of 1 to 10."

### **Giving Back—and Thinking Big**

As a high school senior, DiBenedetto had a pivotal moment when he received several small scholarships during an awards night. Overwhelmed with gratitude for his guidance counselor and school community,

he promised himself that one day, when he could, he would give back.

After college, DiBenedetto started to make good on the promise he made himself by volunteering with the YMCA, the Boys and Girls Clubs and other organizations focused on developing entrepreneurs and the startup community in Tampa Bay. Over time, those early efforts formalized into a nonprofit he launched in 2016 with FSU alumna Jennie Treby (B.S. '95): Think Big for Kids.

At that time, DiBenedetto was leading the sale of Tribridge and serving on several tech boards, where CEOs were discussing a growing talent shortage. "I kept saying, 'Why are we not looking inside of our own country at all the kids that aren't going to college or these kids who don't have help?'" DiBenedetto said. "We have a large percentage of the population that's getting lost, and we have an opportunity to develop them."

Think Big for Kids is a three-pillar program that starts in middle school and guides underserved youth through career exploration, mentorship and career readiness until they land their first job. The hands-on program helps disadvantaged kids move from living in poverty or struggling to make ends meet to earning a livable wage — serving as both a solution to the talent gap and a reflection of DiBenedetto's deep gratitude for the mentorship he once received.

"A lot of people have asked me, 'Why start the program so early?' and that's because they still have a lot of hope," said DiBenedetto. "At age 12, 13, 14, they still believe they can do anything, and I wanted to tap into that energy a little bit."

As of June 2025, Think Big for Kids has served more than 8,500 students in six cities and is on track to surpass 10,000 by the end of the year. DiBenedetto's goal is to expand the program nationwide to reach hundreds of thousands — if not millions — of students.

### **The CARE Program: Coming Full Circle**



DiBenedetto became CEO of Appsplace in 2022 and continues to serve on the board of five technology companies. In addition to founding Think Big for Kids, he is always seeking more ways to formalize his philanthropy.

In 2023, DiBenedetto and his wife, FSU alumna Shannon DiBenedetto (B.S. '94, B.S. '94), established the Anthony and Shannon DiBenedetto CARE Summer Bridge Endowed Fund. In 2024, they pledged \$1 million to create the Think Big Endowment Fund at the College of Business, designed to encourage broader support for first-generation students.

These gifts support FSU's Center for Academic Retention and Enhancement (CARE), which provides orientation, critical support and academic programming for first-generation students—those who often face the same challenges DiBenedetto once did.

"When I saw what Dr. [DeOnté] Brown was doing with the CARE program, I was like, 'this is perfect.' What happened to me informally has now become formal," DiBenedetto said. CARE students, the majority of whom are financially challenged and working through school just like DiBenedetto did, graduate at an 87% rate — significantly higher than the national average.

DiBenedetto encourages fellow alumni to support programs that matter to them. For him, the connection with CARE is deeply personal and impactful. "I really encourage other people who love Florida State to give to the CARE program because the CARE program can work in all the different colleges — not just the College of Business."

## A Legacy That Lasts

DiBenedetto is no stranger to professional recognition. His accolades include induction into the FSU College of Business Hall of Fame and the Ernst & Young Florida Entrepreneur of the Year® Award in Technology. Earlier this year, DiBenedetto received the prestigious Horatio Alger Award of Distinguished Americans, for which he is especially proud because it recognizes overcoming an obstacle, achieving a level of success and giving back—a combination that honors the full arc of his life story.

When asked about his accomplishments as an entrepreneur, DiBenedetto credited much of his success to building strong, collaborative teams and being comfortable with risk.

*“I grew up completely in a risk environment. Things were always uncertain... but it made me super comfortable with two things, risk and communication.”*

He also believes his ability to understand people's gifts and help them grow has helped him succeed. Just as someone once saw his potential and pointed him toward a future he couldn't yet imagine, DiBenedetto is now paying it forward.

By supporting FSU students through CARE and building a broader pathway through Think Big for Kids, DiBenedetto is investing in the next generation of dreamers, doers and leaders. “We went the endowment route because we believe the CARE program is going to be helping kids for a hundred years. We're going to be long gone, and that money will keep working for those students,” he said. “It creates a legacy that lasts multiple lifetimes.”

Sometimes, all it takes is one person believing in you, one piece of advice, one small opportunity, or one meaningful “thank you” to change a life.

*Tony DiBenedetto is a technology executive, entrepreneur and philanthropist with over 35 years of experience in business innovation and high-impact growth. He is the Executive Chairman of [Appspace](#), a SaaS-based unified workplace experience platform. He is also the founder and chair of [Think Big for Kids](#), a nonprofit organization that is breaking the cycle of poverty by providing middle and high school students with career exploration, mentorship, and job readiness and placement. Coincidentally Tony is married to a fellow Andersen Alumnus [Shannon \(McElheney\) DiBenedetto](#)*

*Florida State University Alumni Association*

## The Difference Between a Leader and a Martyr

**Gary Thomson** — Andersen Alumnus and currently a Managing Director at Thomson Consulting

Leadership can be challenging and sometimes frustrating, as managing partners often find their people hesitant to follow where they want to go. This can create a conundrum: should they just move ahead, and hope others will follow, or should they exhibit patience and wait for their people to catch up?

The answer lies somewhere in the middle. As a leader, you must always be one step ahead, but if you are too far ahead, you risk losing people's trust and willingness to follow. And more times than not you end up doing it yourself. When you do this, you cross into exhibiting martyr-like syndromes. It often sounds like, "People aren't following me. I've tried, I've tried, and I've tried. And I'm not getting people to move."

So, are you leading? Or are you being a martyr? Are you just one step ahead or you so far ahead people can't appropriately see or understand your vision?

One challenge managing partners face is balancing, pushing forward and waiting to lead. It's not always clear whether a roadblock is there to test their ability to knock it down or whether they need more patience. Leaders must determine whether their people aren't following because they're not ready or because they need to you to show determined leadership and knock down the roadblocks that often get in the way.

When your team is not moving in your desired direction, it's a chance to dig deeper and discover why. Is it a message for us to wait? Are they not ready, and must we do something different to get them to follow? Or is it a message that says I have to show determined leadership?

The key to balancing pushing forward and waiting to lead is understanding why the resistance is occurring. Is it because there's a lack of clarity around where they're trying to go? Or have they tried something like this before and failed? These are the kinds of questions that leaders must ask themselves and seek advice and feedback from their peers and advisors.

Firm leaders sometimes feel embarrassed to look under the hood and see what's happening; this is where outside feedback becomes vital. Often it takes the experience of someone like me who can express it from an advisory standpoint. You know, those times that I went through similar things and what I would do the same or what I would do differently.

So, next time you face resistance or think your team doesn't want to follow you, ask yourself, do I want to be the martyr, or is there another way for me to exhibit leadership and not be frozen in place?

Are you facing issues with getting your team moving in one direction? Contact me today to see how an outside perspective from someone who's been in your shoes can help.

*Gary Thomson*

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**Gary Thomson** is founder and Managing Partner of Thomson Consulting LLC, which helps professional services firms, primarily accounting firms, in the critical arenas of leadership development, succession planning, personal coaching, M & A, strategic planning, culture, leadership planning and innovation.

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## Four Books for Better Habits in 2026

**Louis Gump** — Andersen Alumnus, Author and partner in the Executive Operations practice at TechCXO

As team members within the world of Andersen, we all experienced an environment that has long valued training, methodology, and excellence.

As another year begins, this is a great time to start strong. One of the most effective ways to do that is by taking a closer look at our habits.

Over the years, many thoughtful books have explored how habits are formed, sustained, and strengthened. The topics covered in them are not necessarily MECE (Mutually Exclusive, Collectively Exhaustive) but they do have many merits!

Here are four that continue to stand out for many of us (with links to more information about each):

[The 7 Habits of Highly Effective People](#), by Stephen Covey (1989)

This is arguably the most influential book on habits of the past several decades. Covey offers a values-based framework that remains remarkably durable, consisting of these pillars: 1) Be proactive, 2) Begin with the end in mind, 3) Put first things first, 4) Think win-win, 5) Seek first to understand, then to be understood, 6) Synergize, and 7) Sharpen the saw.

[The Power of Habit](#), by Charles Duhigg (2012)

This book offers a practical look at how habits actually work, from cue to routine to reward. Duhigg helps explain why habits stick and what it takes to change them sustainably.

[Grit](#), by Angela Duckworth (2016)

Often framed as a book about success and resilience, Grit is also a study of long-term habit formation. Duckworth's blend of passion and perseverance shows how consistent behaviors compound over time.

[Atomic Habits](#), by James Clear (2018)

In this modern classic, Clear focuses on how small, incremental changes build into powerful results, offering actionable insight into how habits evolve and can reshape identity over time. He emphasizes the habit loop of cue, craving, response, and reward, along with the idea of getting 1 percent better every day as a driver of transformative change.

Whether it's a book or a single well-chosen article, starting the year by learning more about how habits form can pay dividends all year long.

Here's a simple way to apply learnings from these books, other research, and your own perspectives:

- Pick one habit
- Make it small enough to do daily
- Track it for 30 days

There are, of course, many other excellent books on this topic, and I welcome further recommendations.

Whether you pick up a book, revisit a familiar framework, or simply reflect on your daily routines, this is a great time to recommit to continuous improvement through intentional, sustainable habits. And as you do that, please consider reflecting on a prior trip to St. Charles or other training centers, where you learned something of lasting value.

Happy New Year!

*Louis Gump*

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[Louis Gump](#) is a business builder, transformational leader, and pragmatic optimist. Following his experience at Andersen Consulting, he held senior executive roles at leading companies including The Weather Channel, CNN, and Cox Communications, and served as CEO of multiple digital media ventures. Today, he is a partner at TechCXO, where he works with leaders of high-growth companies as a fractional CEO/COO, executive coach and frequent speaker. Louis is also the author of the award-winning, best-selling book [The Inside Innovator: A Practical Guide to Intrapreneurship](#), published by Fast Company Press in March 2024.

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## Don't Wait to Add This FREE LinkedIn Feature to Your Profile

**Wayne Breitbarth** — Andersen Alumnus and CEO-Power Formula LLC (Author of "The Power Formula for LinkedIn Success: Kick-Start Your Business, Brand and Job Search")

Have you added the Featured section to your profile yet?

I am simply confounded by how many people I help with a [one-on-one virtual consultation](#) have not taken advantage of this powerful section. And even those who have added it, many of them haven't included their most current and important information.

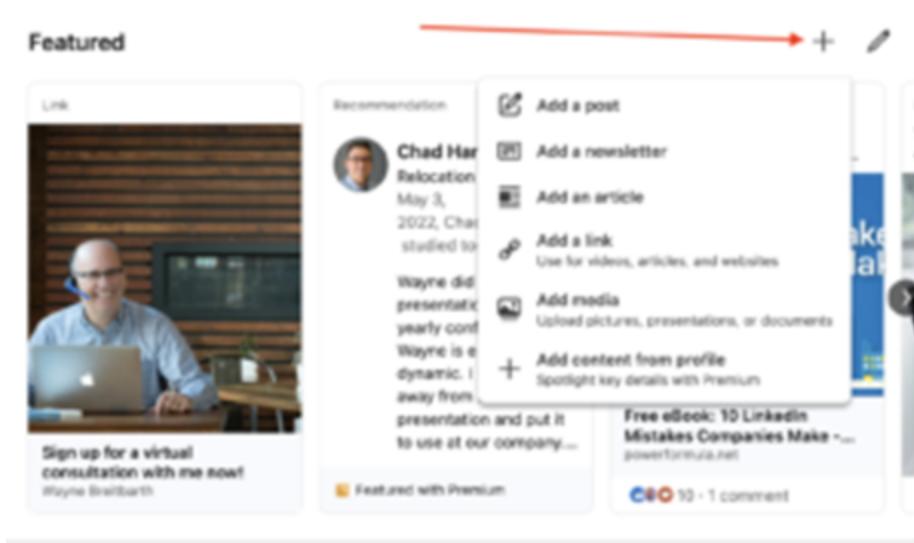


I often refer to this feature as the carousel of your best stuff. It's a can't miss visually and the easiest, most functional way to drive people from your profile to your website. In addition, you can upload your most important documents or media files. It works kind of like the old-school slide projector, but instead of clicking to bring up the next slide (document), you slide left to unveil more and more goodies about you and your company.

How do I get the Featured section and how does it work?

Loading it on your profile is super simple. On your profile, click the blue *Add profile section* bubble, then the down arrow next to *Recommended*, then *Add featured*, and then click the plus sign.

## Featured



You can then select any of the six types of items and put them in your Featured section (LinkedIn post, LinkedIn article, LinkedIn newsletter, link to a webpage, download a media file or if you have a premium account, LinkedIn profile content). LinkedIn will then take you through the specific steps for adding the item you choose.

The items are loaded with a title and description that you choose, along with a thumbnail visual of the item to grab the reader's attention. LinkedIn does not allow you to adjust or change the visual. Therefore, if you don't like the way it appears, you may want to feature a different item.

By default, they display in the order you loaded them, but you can rearrange them so the best two are always up front. Simply click and drag the item using the hamburger icon (four horizontal lines) that appears after you click the pencil in your Featured section. Play around with this. I think you're going to find it works as intuitively as anything LinkedIn has ever come out with.

What should I feature in my Featured section?

You should feature the kind of content you wouldn't want your target audience to miss and things you can't explain or adequately emphasize with words alone. Here are some examples of what you may want to feature.

Business Growth

- PDF file or presentation of your products and services
- Videos of people using your product or service
- Written or video testimonials
- Case studies

- Job openings

### Looking for Work

- Resume (written or video)
- Presentation of important accomplishments or recommendations
- Examples of your best work

### Improving Personal Brand

- Articles you wrote or were mentioned in
- Links to important projects or samples of your work
- Information about your favorite nonprofit
- Alumni news

### Increasing Nonprofit Impact

- Annual or impact reports
- Articles highlighting awards and honors
- Signup sheet or link to volunteer page
- Videos previewing upcoming events or a wrap-up of completed events
- Press releases

### Wayne Breitbarth

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[Wayne Breitbarth](#) is a nationally recognized LinkedIn consultant, speaker, and trainer. I have helped more than 100,000 business people—from entry level to CEO—understand how to effectively use LinkedIn. **SPECIAL OFFER** If you'd like me to help you capitalize on this and other money-making LinkedIn strategies, plus provide an in-depth critique of your LinkedIn profile, [sign up](#) for a one-hour, one-on-one virtual consultation with me for the significantly reduced rate of \$197. Book your personal session today at <https://www.powerformula.net/one-on-one-linkedin-consultation>.

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## Andersen Alumni Association

Membership perks • Sponsors wanted • Socials

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### Alumni Sponsors Wanted

Andersen Alumni Association is proud not to charge annual alumni dues and relies rather on strategic sponsorship to fund operations. Given advances in technology and alumni mobility Andersen Alumni Association is seeking a few additional qualified sponsors. If you think your company may benefit from a strategic partnership with the Association please email [Admin@andersenalumni.com](mailto:Admin@andersenalumni.com) for more information.

## Social Media

Social Media is a great way for us to stay connected.

- [Follow us on LinkedIn](#)
- [Like us on Facebook](#)
- [Join our LinkedIn Group](#)



### Lenovo

Andersen Alumni Association has partnered with Lenovo to provide our members with savings when purchasing top quality PCs, tech and accessories from Lenovo.

[Explore your savings](#): <https://www.lenovo.com/us/en/andersenalumni>



### International Travel - MedjetAssist

Medjet provides reduced annual rates for its Air Medical Transfer membership program on a voluntary purchase basis to North American members affiliated with Andersen Alumni Association. Medjet provides single point coordination for the safety and protection of organizational clients and individuals/families as they travel for personal or business reasons - domestically and abroad. Medjet also offers an optional membership upgrade branded as Medjet Horizon that provides (among multiple membership benefits) a 24/7 Crisis Response Center for Travel Security and Crisis Response consultation and coordinated in-country services. Persons from the U.S., Canada or Mexico can visit Medjet at [www.Medjet.com/Andersen](http://www.Medjet.com/Andersen) or call 1.800.527.7478 or 1.205.595.6626. Reference Andersen Alumni if calling. Enroll prior to travel. Reduced Medjet annual membership rates for persons from North America under age 75 start at \$250. Multi-year and short-term rates are also available. Rules and Regulations available online and provided with Member ID cards.

[Learn more / Enroll](#): <https://www.medjet.com/Andersen>



### **Message from LinkedIn - Update Feature**

Reprint: Communication received by Andersen Alumni Association

Thank you for your continued dedication to your Groups! (Andersen Alumni Association Group Page) Based on member feedback, we have invested in improving the ways that our members can engage in meaningful conversations within safe and healthy communities like yours. In our latest update to Groups, members will be able to easily message anyone in the group without message limits and will have the flexibility to control which messages they accept or privately decline. Members will receive a notification about their message requests just like they would with a regular message and continue the conversation with a single click of "accept". Thank you for your commitment to keeping your community safe and productive. To learn more about this update, visit our help center. Sincerely, The LinkedIn Team