

Association Comparative Analysis

As a prospective member of a CPA firm association, there are a number of questions you should ask to help you evaluate one versus another. Here are some to get you thinking:

1. What is your minimum size firm/largest/average?
2. (If you are among the largest): What issues would my firm need to consider as one of the largest firms in the association?
3. As an \$X million firm, what would be my annual dues?
4. Do you have any other fees to join?
5. What about back end/termination fees?
6. What services do you provide included with dues – be specific
7. What services do you provide a la carte? Cost?
8. What is the average partner income of your member firms? What was it three years ago?
9. Tell me where the association stands on the “association” versus “network” debate?
10. On a scale of 1-100, with 1 being minimum and 100 being maximum, identify the degree to which the association has played a role in the success of your member firms in the past three years.
11. Describe the kind of firm that you want in your association.
12. How many firms have joined in the last 3 years? How many have left? How many have been asked to leave?
13. What is the average tenure of your firms?
14. Is attendance at the association meetings mandatory? How many firms normally attend?
15. Are there any member firm participation criteria? What is expected of member firms? Are there any penalties for non-compliance?
16. What is the governance structure?
17. Are you a for-profit or not-for-profit company?
18. What is the dues formula for US members? What about initiation fees?
19. What is the policy/requirements/dues/differences for Canadian firms? Mexico? Outside North America?
20. What are the policies for leaving, and what are the exit fees, if any?
21. Are there any other annual fees expected outside of “Dues?”
22. Are there referral fees between member firms? Or between firms and the association?
23. Do you allow member firms to be a part of another association of firms?
24. Do you have an International network? If so, elaborate.
25. Are there any requirements and/or desires for a firm to change it’s name or actively market the name of the association as part of the marketing effort?
26. In your view, what differentiates your association from others?

27. Is there geographic exclusivity? If so, what market do I own – how is that determined?
28. How are conflicts between members resolved?
29. Provide a one-paragraph description of the purpose of the association.
30. Identify the Top 3 strategic goals of the association in order:
 - Training
 - Networking
 - Leadership Development
 - Cross selling / referrals
 - International opportunities
 - Grow a national practice under the association's name
 - Marketing assistance
31. Are there any major strategic changes planned or being discussed for the next 24 months?
32. How many paid staff are on the payroll?
33. What is the annual budget of the association?
34. Are there any particular initiatives that the association is involved in that would increase my liability as a firm? Please elaborate – what are the opportunities? Why does the association feel this is worth the risk? Are all firms involved?
35. Are there any legal actions pending against the association currently? If so, explain why a prospect should not be concerned about it.
36. Do you have industry groups? Which ones? Are they required or a la carte?
37. What are the three initiatives in the past two years that you feel have been of most value to your member firms?
38. What are your communications vehicles – how will we know what is happening within the association and across member firms?
39. What else do you want prospects to know about that isn't identified here?
40. Please list the names and numbers of the managing partner of four member firm references to the association.



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