



**Rootworks member  
faces complete firm  
transformation with  
confidence...with a little  
help from his friends**



## The Back Story

Dylan Zsebe, CPA, Managing Partner at Zsebe and Associates, PA has been a long-time member of Rootworks. And while over the years he has used the resources provided under membership, he admitted: "It wasn't until the end of last year that I really started to take advantage of all the value our membership offers. This year, we are committed to being intentional about changing the way our firm does business."

The motivation to engage with Rootworks on a deeper level came about, in part, after Dylan purchased his partner's share of the firm. "I had a lot to do, and I knew I would benefit from ongoing coaching. There is no one else out there who offers the level of coaching support that Rootworks does—there is no expiration date, so you are never left on your own to figure it out. It's like having a team of friends backing you up."

Dylan also attributed part of his newfound motivation to something he heard at the Rootworks annual Inspire conference. One of the keynote speakers, also a firm owner, presented a concept that resonated with him deeply. "He talked about making your firm your number one client. When I heard that, it just clicked. To get the results I wanted, I had to carve out time on a regular basis to work on my business."

And that is exactly what he did. By connecting fully with the Rootworks coaching team, Dylan Zsebe is on a solid path to firm transformation and business success. And facing change isn't as scary, according to Dylan, when you have a little help from your friends.



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## The value of coaching with no expiration date

Energized by his new role as managing partner and with a clear focus on fully implementing the Rootworks business model, Dylan jumped into coaching immediately. "As a member, I don't have to make this journey alone—ever. I think that is what stalls a lot of firms' progress in making big changes—they are out at sea with no one to guide them in the right direction. I have a partner [the entire Rootworks team] supporting me, and that keeps me motivated and on track."

After just a few calls with his coach, Dylan began seeing positive results—specifically in the areas of client experience and firm productivity. Directed by his coach, a few initial key initiatives were to: 1) become more intentional about the type of clients he onboarded and 2) offer products to serve clients efficiently and profitably.

"I went from a mindset of taking whatever clients came in the door and doing one-off engagements to totally transforming how I work. Within the Rootworks structure, I can now deliver a rich client experience while creating strong revenue streams."

Coaching has also helped Dylan differentiate his firm. "Instead of being like every other CPA firm, producing balance sheets and income statements, I've learned to educate prospects and show them dynamic views of their business using vetted Rootworks solutions like Fathom. This takes the relationship to an exciting new level and makes closing the sale easy."

Also on the advice of his coach, Dylan now schedules time to work on his firm. "Every Friday, I set aside two hours to focus on firm priorities—whether it's an assignment from my coach or setting up a new billing system. This is a non-negotiable appointment on my calendar."



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## A little professional advice...

With regular coaching calls and follow-up, Dylan is well on his way to implementing the complete Rootworks model and making positive change on many levels. "Having that one-to-one contact with a coach who guides me step-by-step through the process and holds me accountable for getting things done is invaluable."

Dylan's advice to the profession is to find this same level of support—to no longer try and go it alone. "There are all kinds of workshops and products for our profession that promise positive change, but they all have an end date. And once you complete the program, you are back to being on your own. Real change takes time, years sometimes. With Rootworks, you have peace of mind knowing there is coaching support for your entire journey."