



The Best Accounting Firms to Work For | Best Small Firm: GMS Surgent

In Pennsylvania, an emphasis on education

For the No. 1 Small Firm to Work For in the country, GMS Surgent, learning is a major differentiator. "We consider ourselves to be an education-based firm," said partner Lauren Adamski.

One reason education is so important to the firm is that it shares part of its name with a major provider of continuing education. "One of our partners, Jack Surgent, founded Surgent CPE," explained Adamski. "Even though it's separate, that filters down to us ... so we strive to stay ahead of the curve on new tax laws and planning opportunities, and because of that, I think our technical expertise is ahead of other firms our size."

With just five partners and under 25 staff, leveraging each individual's expertise allows the firm to punch above its weight in serving its broad base of local and national clients in industries ranging from technology, construction and real estate to manufacturing and professional services. "We all get along very well," she said. "We all lean on each other's skill sets to be better as a team than we are as individuals."

It's not just its employees that GMS Surgent aims to teach. "It's educating our clients, too," Adamski said. "There are still accountants out there who gather information, make journal entries, and then hand it back with no explanation; rather than just patching it up, we try to work with whoever's developing the numbers throughout the year to improve their quality all along. ... It's harder to teach someone than to do it yourself, but in the long run it's better for everybody."

Family first

That emphasis on education runs through much of what

GMS Surgent does — and one key lesson that the firm teaches staff is the importance of work-life balance, particularly as employees get older and start families.

"We think it's really important to stress that family comes first — if it's your child's Halloween parade, don't talk to us about a client — go see your kid," Adamski said. "At all levels, even with younger staff, we make sure they understand that you've got to put family first." In pursuit of equilibrium between work and personal life, the firm takes a broad definition of "family," she noted. "If there's something that you love that's part of who you are, you keep that front and center. You have to get your work done, obviously, but that balance is important."

The education theme extends to its recruiting efforts, where the firm aims to engage with young accountants as close to the start of their academic careers as it can. "We have the best success with home-grown employees, so we try to get them as early as possible," Adamski explained. Most of GMS Surgent's employees come to the firm straight out of school, and with its preference for home-grown staff, it is working to develop even closer relationships with nearby colleges.

Developing staff right from the start has helped with retention. "We don't have people leave us for other accounting firms," she said. "And when people do leave us, they're not going to public accounting. They're going to a family business or working for a company."

School's out

Of course, you can't always be learning, and GMS Surgent gives employees plenty of chances for recess.

"We try to have an internal event every month,"

Adamski said — in September, it was a barbecue in the firm's back parking lot, and for November, it will be a trip into Philadelphia to participate in a charity event in the morning, and then take a tour of the Eagles' stadium. ("We're still coming off our Super Bowl high," Adamski admitted.) Other events have included a very popular "Ugly Christmas Sweater Contest," and a day of competitive axe-throwing.

Besides group activities, the firm also rewards staff individually — and puts in the work to learn how to do it right. "If someone's going on a trip, for instance, we try to come up with something, a little perk, such as concert tickets for a band they like," Adamski said. "It requires time and effort, because you have to know what they like and who they're going with and so on. But I think that's more appreciated than, 'Here's a hundred bucks.'"

The firm has also learned that not every much-touted trend will apply to them; for instance, their staff are not as eager for remote work as expected. The firm has all the technology in place for working from home, and on its half-day Fridays in the summer and on other days, it also allows employees who live in Philadelphia to go into the shared workspace it maintains in the city, rather than take the train out to its headquarters in Devon. "But even having the ability to do that, there are very few people who do it," Adamski reported. "They've said they just like coming in better, they like the interaction and being able to walk down the hall and get an answer."

"I thought we were all going to be in the office less and less, but so far it hasn't turned out that way," she concluded. "People really like coming into the office."

— Daniel Hood