



# REDEFINING SUCCESS IN ACCOUNTING

## CONVERSATION WITH A TOP 100 INFLUENTIAL LEADER



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# How Vulnerable Leadership, Smart Resourcing, and People-First Culture Build Sustainable Firms

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Featuring insights from  
Randy Crabtree, CPA  
Co-Founder & Partner,  
Tri-Merit Specialty Tax Professionals

Accounting Today's 2025 Top 100 Most Influential People in Accounting



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## 1. Introduction

The accounting profession is at an inflection point. Talent shortages, burnout, rapid growth demands, and increasing complexity have forced firm leaders to rethink what success truly means.

In this edition of the CPA Talk Series, Randy Crabtree, CPA—co-founder of Tri-Merit and one of Accounting Today's Top 100 Most Influential People in Accounting—shares hard-earned lessons from over 30 years in public accounting. Drawing from personal adversity, leadership missteps, and long-term firm building, Randy offers a powerful framework for creating firms that are not only profitable but resilient, human-centered, and built to last.

This eBook distills the most actionable insights from the conversation into a practical guide for CPA firm leaders seeking sustainable growth without sacrificing their people.



## 2. The Moment That Changes Everything

### Why People Must Come First?

Early in his career, Randy experienced a defining moment that shaped his leadership philosophy. Working at a small CPA firm, he realized he was being treated not as a person, but as a billable hour.

That realization led him to walk out mid-day and never return.

This experience planted a core belief that would later define his firm-building approach:

**Firms don't succeed because of systems alone—they succeed because people feel valued, trusted, and heard.**



Many accounting firms still unintentionally operate with a productivity-first mindset, assuming long hours and personal sacrifice are the price of success. Randy challenges this assumption directly. In his view, when firms prioritize utilization over humanity, they lose engagement, creativity, and eventually, talent.

## 3. Vulnerability as a Leadership Advantage

One of the most pivotal moments in Randy's life came not in the boardroom—but through a personal health crisis. Some years ago, Randy suffered a stroke. Overnight, he was forced into vulnerability, dependence, and uncertainty.

That experience reshaped his understanding of leadership.



Vulnerability isn't weakness—it's what gives teams permission to ask for help, innovate, and grow.

Post-recovery, Randy recognized something critical: he was not suited for the Managing Partner role he had assumed at Tri-Merit. Rather than masking this reality, he chose to address it openly—stepping down and realigning his responsibilities around his strengths.

This act of transparency did more than redefine his own career—it set the tone for the entire organization.

Key takeaway for firm leaders:  
When leaders admit limitations, they normalize learning, collaboration, and trust across the firm.

## 4. Redefining Outsourcing: From Transactional to Integrated

Tri-Merit operates on both sides of the outsourcing equation:



As an outsourced specialty tax partner for CPA firms



As a firm that uses offshore and external teams internally

Randy avoids even using the word “outsourcing.” Instead, he views external partners as fully integrated team members—onboarded the same way, held to the same standards, and included in the same feedback loops.

Whether team members are based in the U.S., Mexico, or India, they are treated as equals within the Tri-Merit ecosystem.

This dual perspective has shaped a clear philosophy:

### Outsourcing should never feel like “us vs. Them.”

It should feel like one team working toward a shared outcome.

This approach delivers three critical benefits:



Quality control remains high



Client trust is preserved



Internal teams feel supported, not replaced

## 5. Smart Resourcing Is Not a Seasonal Fix

One of the most common mistakes firms make is treating outsourcing as a short-term solution—something to “get through busy season.”

Randy strongly disagrees.

Sustainable firms build long-term resourcing strategies, not temporary fixes.



Instead of asking, “How do we survive the next deadline?”

Firms should ask,

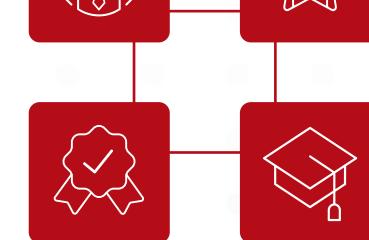
**“How do we design work so our people can thrive year-round?”**

This shift allows firms to

Reduce burnout



Increase retention



Build institutional knowledge across teams

Improve consistency for clients

## 6. The Simple Exercise That Changes Everything

To identify where outsourcing (or internal reallocation) truly makes sense, Randy recommends a deceptively simple but powerful exercise.

Each team member lists their responsibilities and evaluates them across four dimensions:

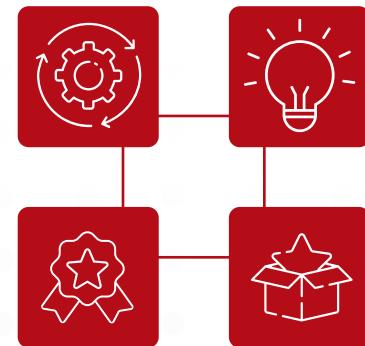


Tasks that fall into the “hate it” and “bad at it” quadrant are prime candidates for reassignment—either internally or through strategic partners.

This exercise does more than improve efficiency. It requires vulnerable leadership because it invites honesty without fear of judgment.

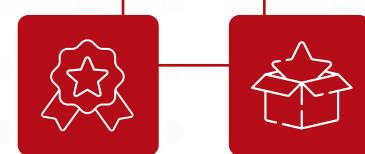
When done firm-wide, it reveals:

Skill gaps



Hidden strengths

Areas where outsourcing creates leverage, not friction



Opportunities for smarter delegation

## 7. Why Outsourcing Supports Retention (Not Just Capacity)

Retention in accounting cannot be solved by compensation alone.

Strategic outsourcing enables firms to elevate internal teams—allowing senior professionals to focus on advisory, leadership, and client relationships instead of constant execution.

Experienced professionals stay when:



- They feel challenged
- They see growth opportunities
- They aren't buried in repetitive, low-value work

Randy points to Tri-Merit's most telling success metric:

**In 18 years, with a team of ~80 people, only 10 employees have left.**



That level of retention doesn't happen by accident. It's the result of aligning work with strengths, fostering trust, and designing roles that evolve with people—not against them.

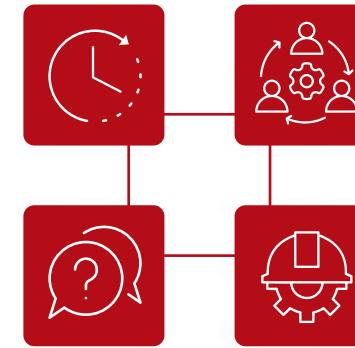
## 8. Mental Health, Burnout, and the “Answer Provider” Trap

Accounting professionals are conditioned to believe they must always have the answers.

Randy calls this the “Answer Provider Mindset.”

While well-intentioned, this mindset often leads to:

Chronic overwork



Guilt around asking for help

The solution isn't working less – it's working differently.

You cannot serve clients well if you are unwilling to serve yourself.

By building teams—both internal and external—that share responsibility, leaders free themselves to focus on what they do best. When work aligns with passion and skill, it stops feeling like work at all.



## 9. The One Action Every Leader Can Take Today

If there is one leadership habit that Randy believes has the greatest impact, it is this:

**Say**

"I made a mistake."

**Say**

"I need help."

**Say**

"I don't have the answers."



These simple statements unlock:

Psychological safety



Innovation

Risk-taking



Collective ownership

Organizations that fear mistakes stagnate.

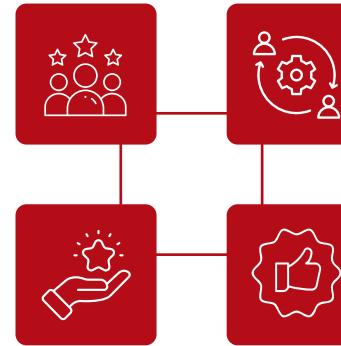
**Organizations that normalize learning grow.**

## 10. Final Thoughts: A New Definition of Success

Success in accounting is no longer defined solely by revenue, headcount, or billable hours.

True success looks like:

Teams  
that stay



Leaders who  
delegate

Cultures that  
support mental  
health

Firms where  
people enjoy  
coming to work

As Randy Crabtree's journey shows, when leaders align work with passion, build trust through vulnerability, and embrace smart resourcing, they don't just build better firms—they build better lives.



### About the Speaker

Randy Crabtree, CPA is Co-Founder & Partner at Tri-Merit Specialty Tax Professionals and one of Accounting Today's 2025 Top 100 Most Influential People in Accounting. He is the host of The Unique CPA Podcast (ranked in the top 5% worldwide) and creator of the Bridging the Gap Conference. Randy is widely recognized for his advocacy of people-first leadership, mental health awareness, and sustainable growth in the accounting profession.



## About Datamatics Business Solutions:

Datamatics Business Solutions is a technology-driven outsourcing partner or leading global enterprises. With our technology enabled accounting services, we help firms achieve their business goals with absolute ease.

With a perfect balance of a highly scalable and secure ecosystem comprising of some of the most acclaimed accounting & ERP software and human ingenuity to go with, we have been able to retain 100% of our client in over a decade of our operations.

Reach out to us for more details

USA : +1-571-297-6166 | EMEA : +44-20-3005-2151 | APAC : +91-22-6671-2001

Website : <https://datamaticscpa.com> | Follow us on Linkedin –

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