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Life counts

The team at Countplus loves changing people's lives for the better.

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As the outgoing CEO of Countplus, Phil Aris makes no bones about snooping into people's private lives. In fact, the more he pries into their lifestyles, their families, their health and their finances, the more gratified he feels. Empowered, even. After all, knowledge is power, power transforms, and Phil is all about transformation.

The professional services company, based in Sydney, is an aggregation of

18 businesses offering specialist advice in accounting, business, financial planning and property services. Scattered across Australia in 23 locations, with an employee base of 650, the businesses are run independently but collaboratively, sharing ideas and data to reap positive results for their clients. It's these life-changing outcomes that drive Phil and his team.

"Our existence is to hold the hand of our clients and take them on their journey in life in terms of their financial requirements," Phil says. "Providing great outcomes is what drives us."

Countplus was established in 2006 as a subsidiary business of Count Financial >>

and was listed on the ASX in December 2010. Collectively, the Countplus principals hold the largest shareholding in the company, while Count Financial, now owned by CBA, remains the largest single shareholder. When partnering with Countplus, business owners are encouraged to swap control for shares in the listed company, with an agreement to buy back at least 40 per cent of their company's equity at a later date.

"We are not an aggressive acquirer. It's all about quality, not quantity, with us," explains Phil. "We choose high-performance firms with good leadership and strong succession planning, who have collaborative cultures, and are confident enough to share their ideas and their war stories. They must learn from each other so all that knowledge can be used to get the best outcomes for our clients."

"In a way, we provide our clients with an office that is effectively their family. Small businesses can come to us for a broad range of services required to get them ahead in business and in their personal lives. We are not owned and controlled by big institutions, so they feel like they are being cared for in a much more personal way."

Phil, who has previously worked in managerial capacities in multinationals, both overseas and in Australia, admits he's "good with numbers". But it was the fascination for kick-starting people on a personal journey to reach financial and life goals that led him to Countplus in January 2015.

"Our clients range from mum-and-dad operations to reasonably large SMEs employing up to 100 people," Phil explains. "Sure, they want tax and accounting work done, but they also want to understand how they can better perform in their business. Sometimes they have no idea where to start. So we help them work out their objectives and provide the services needed to meet them."

To develop its own leadership strength and those of its collective business, Countplus has enjoyed a four-year

THE NEXT LEVEL

After serving as a Countplus director since October last year, Matthew Rowe has taken over as CEO from Phil Aris.



The former Financial Planning Association (FPA) chairman, and previous managing director of Countplus member Hood Sweeney, says he's inspired by the talent he has discovered among his associates.

"The more I listen, the more excited I become about how far we can take Countplus," he says.

"My colleagues have been fantastic with my transition from NED to CEO, and there's a lot of collective wisdom in the team making up the Countplus Board."

It's that example which Matthew wants to encourage through his leadership as he aspires to a culture of team before the individual. Despite having two decades of general management experience, Matthew left Hood Sweeney in 2015 to study the General Management Program at Harvard Business School in Boston.

"That was life-changing on so many levels," he says. "From how I see the role of business in the community to the way I make decisions, my views on what it means to be an effective and authentic leader, and the really key aspects of effective strategy. To be able to go back to school later in life, with experience in the real world of business, live on campus, and immerse myself in the Harvard environment, was something very special."

"In collaboration with Countplus, we facilitate the Courageous Leadership Program to develop the real leadership that enables high performance within the business. It wants leaders taking responsibility and accountability for their behaviour, knowing 'culture eats strategy for breakfast'." – Mandy Holloway, CEO, Courageous Leaders

relationship with Courageous Leaders, which offers a training program for existing and emerging managers. Up to 25 senior staff are put through intensive training every year to maintain strong leadership and develop work cultures to strengthen their relationships.

"While these firms already have solid infrastructures, we have to bring them all together to work with each other," Phil explains. "Courageous Leaders is sensational at what it does, but it also reflects well on us because we're providing the initiative."

"We also outsource our HR to People Culture and Strategy, who draw up our employment contracts and deal with any issue, and Addisons handle all our legal needs. All these excellent partners provide fantastic services, which means we don't have to build a large, centralised office."

While Phil is the first to concede he works in an industry where people are critically important, he is adamant that technology is just as vital. Countplus is

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fastidious about providing required information to its clients, linking together data feeds that reveal an immediate overview 24/7.

"We are a digital industry," he explains. "You can do all the work in the world face-to-face with clients, but that means nothing if you have systems that are too slow or clunky. There is a lot of software out there, and we need software so that our services can talk to each other. It's providing a holistic service that gives us data feeds of all our clients' activities, their bank accounts, super funds, investments, property, assets and liabilities. A decade ago that was unheard of." ■



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