

BY CRAIG M. DOUGLAS
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It's already too small. The paint is barely dry on the walls at UHY Advisors' new offices on the 38th floor of 53 State St. The accounting firm moved from 7,000 square feet on Canal Street into the new space to accommodate its growth.

UHY is now in 27,000 square feet of Class A space.

And as a bemused Carl Jenkins pointed out, it won't accommodate the overflow of employees UHY garnered from its latest acquisition.

"I guess we don't have as much space as we thought we would," said Jenkins, managing director of UHY. "We'll just have to go out and get some more."

Jenkins doesn't seem all that concerned about the conundrum, the latest faced by a company finding itself juggling exponential growth, a heated acquisition strategy and, to top it all off, a move.

A growing industry

UHY officials made the decision about a year ago to begin the search for new space to accommodate its growth as it undertook an aggressive expansion campaign into New England. The accounting industry's middle market is undergoing one of the more dramatic periods of M&A action.

For UHY, a national firm with headquarters in Chicago, that strategy has manifested itself in acquisitions that included Brown & Brown LLP in Boston last summer and Carlin, Charron & Rosen of Worcester last month. The deals put Jenkins — the former head of Brown & Brown — atop a business with more than 200 certified public accountants and \$60 million in annual revenue, making it the fifth largest accounting firm in Massachusetts.

Lynn Tan, UHY's director of facilities, said the entire process in

UHY, a firm with an aggressive expansion campaign, recently added a corporate relocation to the mix. Through words and images, we follow the firm from Point A to Point B

Growing ... growing and going

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The "before" shot: Carl Jenkins, managing director of UHY Advisors, in what will soon be his office at 53 State St. For more photos of UHY's move, see Pages 40-41.

UHY: Documenting a move

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Boston started about 14 months ago, well before UHY had even made its successful bid for Brown & Brown. At the time, UHY's local presence amounted to about a dozen people, meaning Tan had to get a rough estimate of the company's growth prospects before calling local landlords.

That challenge was only compounded when, after identifying UHY's new space, Tan had to then develop a blueprint and a robust telecommunications plan that could be up and running in little time — all with the understanding that the firm's continued growth would likely throw a monkey wrench into the mix.

"If anyone thinks they can do this on their own, it's just not going to work," said Jenkins, noting that the firm's dedicated moving coordinator, in this case Tan, allowed the rest of the company to focus on its day-to-day operations.

Getting it done

Tan managed the process in segments, with time deadlines and specific instructions for UHY's existing staff. She also brought in an outside consultant, Diversified Project Management in Boston, to walk the company through a handful of crisis-control scenarios.

Weekly meetings were held among top managers and DPM to ensure the plan was understood, updated and on track. As the moving deadline neared and construction crews worked overtime to bring the new office up to speed, UHY's staff was broken into groups with designated leaders. Tan said each team "got a lot of encouraging" in terms of purging unnecessary office furnishings and files before packing their moving crates. The weekly meetings with DPM were soon augmented by separate weekly meetings among team leaders and UHY managers.

Phil Leonard, UHY's point person

at Diversified Project Management, said the move was fairly smooth, noting that Tan and the rest of the firm's managers were both responsive and realistic from beginning to end. He said that scenario is often to be desired, as company CEOs or other senior executives try and manage a move while also dealing with their other day-to-day responsibilities.

The result is often busted budgets, wasted time and plenty of disruption to the business in question. "They expect it to be a very straightforward process, and it isn't," Leonard said.

Jenkins said concerns were constantly voiced and addressed at the weekly meetings, adding that there was considerable stress over whether the firm's service providers would have the phones and computers up and running the day of the move.

A first move of around 30 workers went off without a hitch Jan. 12. The rest of the firm was in the new space Feb. 5. Jenkins said every moving crate was unpacked and removed within five days. The computers and phones were transferred without issue.

It was largely the CCR deal that forced UHY to rethink its floorplan, Jenkins says, adding that the new State Street office was originally supposed to be around 25 percent vacant. With a 10-year lease now in effect, he said the overflow will likely be housed in CCR's existing Boston office or in another nearby location.

That UHY was able to pull off a major acquisition while in the midst of a relocation is a credit to the firm's planning and management, Jenkins says. Specifically, he tipped his cap to Tan. "Things went smooth," he said a week after the final move. "Those things always work out — they're just never simple."

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