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People in DH&S: Jule Phoenix

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It is a long way from practice development to marketing, even though it might not seem so at first. Implied in the change of terms is a fundamental change in attitude and practices. And no one has had a closer look at this shift, as it affects our firm and the public accounting profession as a whole, than Jule Phoenix. He took over the direction of practice development in Executive Office in 1974, under conditions that now seem like those thirty years ago. He retires this June as partner responsible for the firm's marketing program, leaving an organization that was scarcely in anyone's dreams just seven years earlier.

Not everyone in business or the professions can abide deep and rapid change; it throws some into confusion and leaves others behind. Let it be said of Jule Phoenix that he seems to have had built into him the right combination of qualities that enabled him to deal with the big turn that Deloitte Haskins & Sells has made over the past few years, along with the entire profession. He kept a cool head. He was never diverted from his course that he considered right for a great firm with a distinguished past and the promise of a future of continuing distinction and excellence.

When the accounting profession, under the pressure of voices in Congress, the Department of Justice and various consumer advocates, decided in 1978 to change its rules, there was considerable doubt as to where the new practices would lead. It would now be acceptable to approach the consumer advocates, decided in 1978 to change its rules, its stepfather was variously a state senator, state commissioner of agriculture and lieutenant governor. In high school Jule took part in a Dramatics club that won several awards in state competition. When he entered the University of North Carolina at Chapel Hill he continued his interest in Dramatics and speech. He also studied accounting and found it very much to his liking.

One incident during his Chapel Hill days stands out vividly in Jule's memory, and perhaps it was prophetic of his readiness to deal smoothly with new situations. Jule was the student announcer for a campus radio station panel discussion by professors. The scheduled topic one Sunday morning: "Why Japan Attacked the United States?" The date: December 7, 1941. A few minutes before the program was to go on the air, Jule and the professors heard the dramatic news that the Japanese had attacked the Pearl Harbor naval base in Hawaii early that morning. Hardly skipping a beat, the young student announcer and the faculty panelists switched the topic to: "Why Japan Attacked the United States."

"I suppose that we were the first panel discussion on the air devoted to that subject," Jule says now, nearly forty years after the event.

As a member of the Naval ROTC program at the University, Jule was deeply immersed in the navigation course. This led to his becoming the navigator on a patrol craft escort in the South Atlantic after the U.S. Navy summoned him in 1944. Later he was sent to the Pacific and he was in the Philippines when World War II ended. After a few months of duty in Florida helping to mothball destroyers, Jule was discharged from the Navy in the spring of 1946 and returned to the university for his final year of accounting studies.

How did Jule come to our firm? At the time, he recalls, "I
asked Professor Peacock at Chapel Hill which was the best firm in North Carolina, and he suggested that I sign up for an interview with H&S during its campus visit. As a matter of fact, it was the only job interview I have ever had in my life. Orin Hutchinson was the partner in charge in Charlotte then, a very big and impressive man, and he did the interviewing. A little while later he sent me a letter offering me a job. I wrote right back accepting, not knowing what I would be paid. Then he sent me a letter saying that my salary would be $200 a month. He added that normally it would have been $175 a month, but I was married.

"I started work on April Fool's Day 1947, then sat for the CPA examination in May and passed it. In Charlotte at that time the office had one partner, two managers, and perhaps twenty people all told. I got started on audits, and I sometimes found the client people calling me 'Mr. Stewart'. It turned out that Bill Stewart had been on the same engagements the year before and it took a few weeks for them to realize I wasn't Bill."

Now comes the first in a series of incidents in Jule's career with the firm that characterize him as the adaptable, willing team player. In 1950 when he was a senior accountant he was asked to become a specialist on the Excess Profits Tax of 1950 and to transfer from audit to tax work. Jule did as he was asked. He worked hard to develop his skills in tax, and by the time he became a partner in 1957 he was head of the Charlotte tax department. He remembers those days as particularly rewarding for two reasons. First, he was boss of his own operation, a situation that gave him latitude to give his best efforts as he saw fit. And second, Jule recalls the satisfaction of seeing his work directly help a client. That feeling of satisfaction from service is a great motivating force with the true professional, he believes. Jule expressed his service philosophy quite clearly in an article entitled "Reaching Out" that he wrote for H&S Reports in 1969. He put it this way:

"My advice to anyone in the firm is to take the attitude that the client you are serving is the most important client the firm has; then reach out to render service to him in every way you can. Help him solve his problems — not only the problems he has referred to you, but all the others that you can see as you go about conducting the engagement. Bring to bear on his situation all the vast resources and experience that our firm has to offer. Beyond that, reach out to develop yourself so that you can add to the sum total of the firm's services." One might say that Jule was going "Beyond the Bottom Line" way back then.

It was during his time in the Charlotte tax department that Jule gained a sense of the firm's caliber nationwide. "When I started going to tax conferences in 1951," he recalled for DH&S Reports, "I remember meeting people from all over the country for the first time. I was impressed by how well they knew their subject, and what fine qualifications the people in the firm had. And at the same time, if I learned something at the meeting that I did not know, I felt that I had not really done my homework — that there was something wrong with me."

This determination to do his best, to strive for excellence, must have been quite noticeable to those around Jule. He became a partner in the firm in 1957, ten years after joining the Charlotte office. Then, in 1958, he was asked to transfer to Executive Office to become the firm's specialist in public utilities. Jule says now, with his habitual modesty, that his only experience in public utilities was doing the payroll work at Duke Power as an assistant accountant. Nevertheless, he was game to take on the task when John Queenan, then the firm's managing partner, asked him to do so. So it was farewell to his familiar native North Carolina, goodbye to the Charlotte tax department, a move to Executive Office and a fresh start. By this time he and Anne had a full house, with three sons, ages eight, six and three. They settled in Short Hills, New Jersey, and Jule became a railroad commuter into the big city.

When asked now about his feelings on transferring abruptly from one kind of work to another, whether or not moving his home and family is involved, Jule takes a simple, forthright stand: "I have never asked for an assignment, and I have never refused one. I have always felt challenged by what I am doing. When asked to take on something new, I have always been ready to do it."

This attitude is certainly appropriate for a man who time and again has been challenged with new responsibilities. As the firm's public utilities specialist he visited all the offices that had public utilities clients, studying the issues involved in serving them, attending utilities conventions, and getting acquainted with the people in the industry. "I kept a file of notes on the people I met," he recalls, "because I am not a natural at remembering names the way some people are. I had to struggle to learn those names and remember the faces."

A few years in this position and then Jule was asked to take on an additional assignment — directing the research department in EO. He recalls that in those days most of the department files "were kept in the head of Mary Maloney," and there was a crying need for a more systematic organization. So, while continuing to fill the role of public utilities specialist, Jule also supervised the research department.

It was in the cards that a partner so versatile, and who was a willing member of a growing team, would be chosen as partner in charge of a practice office. In 1966 Jule was selected to transfer to Miami to work for a year with Hugh Purvis, who had recently merged the practice of his strong Florida firm with that of our firm, and then to succeed Mr. Purvis as PIC.

"I couldn't have had a better response from everyone in Miami for a new fellow coming in," Jule says in looking back on his early experience in Florida. "Hugh Purvis was a remarkable man and he had a fine firm, the best in the state, at the time of our merger. Hugh saw to it that I met a lot of people in town, and I needed that because I didn't know Miami at all. Later, by the way, I urged Hugh Purvis to write a history of his firm, and he finally did so. Our firm helped him bring it out in booklet form a few years ago."

"I must say that in Executive Office I had missed the client contact that I enjoyed back in the Charlotte days. So in Miami I particularly appreciated renewing this aspect of public accounting. Another thing that gave me special satisfaction was to work with an unusually talented group of younger professionals. Helping to shape their careers was one of the
highlights of those years in Miami. Among our group there, just to name a few, were Mike Cook, now a partner in EO; Cary Findlay, now the Charlotte PIC; Vic Marchese, PIC in St. Louis; Dan Norris, the Birmingham PIC; Henry Forer and Al Leiter, national industry directors for the savings and loan and banking industries respectively, and lots more.

"Some of Anne's and my best friends are still in Miami," Jule says now. "We enjoyed our seven years there, and our boys grew up there. After all, whether you like a place or not doesn't depend so much on geography. It depends on the people." He adds that if they missed anything during those Miami years it was the change of seasons to which he was accustomed in North Carolina and in the New York area.

But as it was fated to happen in the life of Jule Phoenix, the call came again for him to take on a new responsibility. This time it would be the international department in EO. During the period he was in Miami, Jule had become acquainted with a number of clients and other people involved in international business, particularly in Latin America, because Miami in the jet age had become the gateway to Latin America.

By this time in his professional life Jule must have learned that he was not destined to linger in one place for too long. In this case year one did it. After a year's concern with arranging overseas assignments, recruiting qualified staff and managers for international service and maintaining liaison between our firm and associated firms in other countries, Jule was asked to take on still another challenge. This time it was to become the EO partner responsible for practice development, or practice furtherance, as it was termed at the time.

Early in 1974 it may not have been obvious that the winds of change were about to sweep away decades of past practice in the accounting profession insofar as the rules and practices of competition were concerned. But the signs were already in the air. It was already clear that our firm, like all the other national firms, was facing stiffer competition than ever before. The ethical rules of the AICPA governing solicitation and advertising were being questioned in various quarters, among them committees of Congress, the Department of Justice and the press outside the profession. There was a strong threat of regulatory legislation unless the public accounting profession became even more competitive. And so, step by step, the profession in the mid-1970s abandoned its old restraints on advertising, promotion, solicitation and other aspects of competitive business.

The bright feather in Jule's cap today is the patient, disciplined way in which he redirected the firm's business-getting efforts through these critical years. In his time our organization swung in a wide curve from a tightly restrained posture in practice development toward an active, even aggressive, program of marketing. For instance, when Jule took over responsibility for practice development in EO, the firm was issuing each year a scant two or three booklets for outside distribution. With Jule orchestrating the cooperative efforts of many
Jule and his colleagues have played an invaluable role. "Seven and MAS subjects, Jule also saw to the production of market-
coordinating the issuance of booklets on accounting, tax dozen titles a year at first, then twenty, then thirty. In addition specialist groups produced a flow of booklet ideas and manu-
partners and managers, various departments and industry partners and managers, various departments and industry specialist groups produced a flow of booklet ideas and manuscripts that resulted in an increase in booklet production to a dozen titles a year at first, then twenty, then thirty. In addition to coordinating the issuance of booklets on accounting, tax and MAS subjects, Jule also saw to the production of marketing booklets and brochures designed to inform potential clients of our services. The most popular and generally useful of these, entitled An Introduction to Our Firm, has become a hardy perennial, going through several revisions.

The decided turn toward a marketing approach can be measured also by the number of proposals for service in which Jule and his colleagues have played an invaluable role. "Seven years ago I could count the number of proposals I had made on the fingers of one hand," Jule recalls. "Now the firm is involved in thousands each year, many of them for major companies." What used to be an extraordinary event carried out in an atmosphere of improvisation has become a regular occurrence, with the responsibilities of the practice office concerned and the EO marketing team carried out much more smoothly and with more self-confidence than before.

Perhaps the most obvious turnabout in the firm's relations with the outside world is the advertising and press relations program. When Jule came into his present position, advertising was taboo. But after the AICPA dropped its ethical barrier to advertising, DH&S engaged an ad agency, with which Jule has worked closely as a member of the firm's advertising committee. Over the past two years DH&S ads have appeared prominently in several leading business magazines and in newspapers. Likewise, from a position where issuing press releases was frowned on by the AICPA as unprofes-
sional, we have progressed to the point where the firm issues many press releases from EO each month on a variety of subjects of interest to the business world. In addition, Jule's department has assisted the practice offices in getting the firm name into the local newspapers with news of promotions, educational seminars, speeches and advice on business subjects. So DH&S faces the world in quite a different way from that of seven years ago, when Jule Phoenix took on the job of directing our practice development efforts. He plans to retire from active practice in June and devote much more of his time to golf and to his hobbies. He particularly enjoys photography and is anticipating building a darkroom in his basement workshop. On one trip to Kenya a few years ago, Jule says that he must have taken 1,000 pictures. Although he expresses regret that "not one of them is outstanding," he has the reputation for knowing his camera equipment and handling it with an expert touch. And, like many of his colleagues, he plans to be out on the golf course much more often than he could manage up to now.

"In public accounting you do not have a 9 to 5 atmosphere," Jule says. He has shown a prodigious capacity for work, coming to the office early and staying late with an extraordinary energy and tenacity. "There is always something more that needs to be done. You just can't do this work with your left hand."

Jule pays special tribute to Anne for her role in helping him achieve a number of his objectives in the firm and the profession, especially in taking their several transfers in stride, with a willing spirit. Jule points out that her taking part in many community activities has helped both of them to expand their circle of acquaintances in Charlotte, in Miami and in New Jersey. For instance, when Jule was on his first tour in EO and they were living in Short Hills, New Jersey, Anne was active in New Eyes for the Needy, a medical aid group. Now Jule is a board member of that organization. Anne's talent for organizing was quite apparent to John Queenan, managing partner of the firm in 1970, when we celebrated our seventy-fifth anniversary. At the partners meeting that year, to which wives were invited, Anne was asked to take charge of the program of ladies' activities. She carried it off in grand style, producing a memorable week of events that was much appreciated by everyone present.

As he leaves the firm this spring after thirty-four years of giving his best, Jule is bound to turn his energies in other directions, because temperamentally he is not the kind of man who can turn his fires off right away. Of course, he will enjoy a more relaxed social life because he will have time for it. As one who has loved the stage ever since he was a high school actor, he and Anne will be going into New York City more frequently now for dinner and a show — they are both fond of musicals. And travel will be high on the Phoenix agenda, because Jule's recent vacation trips to other parts of the world have whetted his desire to see more.

"As a matter of fact, we're planning on going to China in October," he says, "and we're going to take my mother along. It will be her eightieth birthday trip! We can expect Jule to come back with a first-rate collection of color slides. Wait and see.