

Title: Firm Culture in Managing Change

Increased pressure brought on by a post-recession sluggish economy, industry-wide consolidation and ever-increasing competition for clients and quality staff demand that CPA firms make strategic, operational and cultural changes to ensure a secure future. What made your firm successful in the past may not necessarily be the same formula that will lead to success in the future. Thus, creating the need for change. Properly managing change and culture is extremely challenging and time consuming; however, it's a key component to taking your firm to the next level of success and implementing a succession plan.

Major Topics:

- An overview of the current state of the CPA profession's changing landscape and predictions for the future that are necessitating timely changes in strategy and culture in CPA firms of all sizes.
- An overview of various elements, steps, and types of change management. Aligning the process to the short and long-term goals of your firm.
- A review of the top 10 cultural obstacles to change and how to deal with them effectively.
- Identifying the key dynamics that make dealing with change so challenging. How firm leaders can better overcome passive and active resistance to new change and culture initiatives.
- Most firm leaders focus on strategic and tactical plans to ensure change versus the human side of the process. How failing to address the human and cultural side of change can be costly to your firm and how to address and overcome these road blocks.
- Examples of positive changes taking place at progressive and successful firms.

Learning objectives:

- Communication techniques in moving from the planning stage of change management to the personal commitment stage to implementation.
- Dealing with expectations and reality to integrate change into the firm.
- Creating a Change Management Plan and the role of the Firm leaders in implementing this process.