



## **AAM Updated Strategic Long-Range Plan**

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## INTRODUCTION

AAM's strategic long-range plan describes a desired vision and what will be essential to achieving that vision. It is grounded in **core ideology** and driven by an **envisioned future** that realizes the full potential of AAM's ability to support its stakeholders and the industry. AAM's commitments are articulated in **goals** that declare the outcomes or attributes the organization intends to achieve. **Objectives** represent key metrics affecting AAM's ability to achieve the goal and articulate the direction in which these issues must be moved. **Strategies** will describe how AAM plans to commit its limited resources to make its vision a reality.

In the future, AAM will not be able to be all things to all people, but it must be different things to different people as the plan evolves to meet the needs of a constantly changing professional environment. Therefore, underlying this plan is the adoption of an ongoing process of planning and thinking strategically, designed to ensure relevance of direction and action over time.

In developing this strategic plan, a framework for planning was utilized, based on a model that organizes conversations about the future into four distinct planning "horizons." Tecker Consultants has found the use of this framework to be a powerful tool. It helps organizations in prioritizing and executing outcomes as well as in ensuring relevance of an organization's long-range direction over time.

**Envisioned future.** The "four planning horizons" framework consists of crafting a comprehensive strategic direction based on the balance between what doesn't change--the timeless principles of the organization's core purpose and core values (core ideology) -- and what the organization seeks to become within a 10- to 30-year horizon--what would be possible beyond the restraints of the current environment. The 10- to 30-year horizon is characterized by the articulation of an envisioned future--a BAG (big audacious goal)--and a vivid description--what it will be like to achieve the goal.

**Critical factors.** The articulation of the envisioned future guides the organization as it considers the factors that will affect its ability to achieve its goals. Building foresight about the 5- to 10-year horizon--assumptions, opportunities, and critical uncertainties in the likely relevant future as well as emerging strategic mega-issues--suggests critical choices about the potential barriers the organization will face. This foresight also suggests the responses the organization will need to consider in navigating its way toward achievement of its 10- to 30-year goal, or BAG.

**Strategic plan and operational planning.** The linkage continues into the 3- to 5-year horizon through the development of a formal long-range strategic plan, in which the organization articulates the outcomes it seeks to achieve for its stakeholders. How will the world be different as a result of what the organization does? Who will benefit, and what will the likely results be? Further, the articulation of strategies will bring focus to AAM's annual operational allocation of discretionary resources. Action plans, checkpoints, and milestones will be developed through a process of operational planning, indicating AAM's progress toward each goal in every planning year.

A strategic long-range plan is not intended as a substitute for an annual program or operating plan. It does not detail all the initiatives, programs, and activities the organization will undertake in the course of serving its membership and the industry, nor can it foresee changes to the underlying assumptions on which key strategic choices were based. Instead, the strategic plan identifies what AAM is not doing today, but must be doing in the future to be successful. Consequently, the strategic plan implies change--doing new things or doing more or less of current activities to ensure successful outcomes.

**Ongoing Re-evaluation.** Strategic planning for AAM should become the methodology for the organization's operations. If it is successful, this process will not have yielded a plan to be placed on the shelf, but will have served as a catalyst for the "process of planning strategically," at all times and at all levels throughout the organization. In order to achieve its vision, AAM must not look at strategic long-range planning as a one-time project that produces a milestone document of its best thinking at the moment. Instead, AAM must adopt strategic planning as an operational philosophy of ongoing re-evaluation of the critical knowledge bases that form the framework of its world, including:

- Sensitivity to member needs, insight into the future environment of the industry,
- Understanding of the capacity and strategic position of the organization, and
- Effective analysis of the ethical implications of policy and program choices.

AAM's strategic long-range plan represent a compass the organization will use to guide its work over the next five years. Each year of its life, the plan will be updated based on experience or new circumstances or as new opportunities or challenges emerge. In 2013, AAM should author a new strategic long-range plan based upon the new environment expected to exist in a rapidly evolving world.

## 10-30 YEAR PLANNING HORIZON

### ~ CORE IDEOLOGY & ENVISIONED FUTURE ~

**Core ideology** describes an organization's consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two notions: **core purpose** – the organization's reason for being – and **core values** – essential and enduring principles that guide an organization.

**Envisioned future** conveys a concrete, but yet unrealized, vision for the organization. It consists of a **big audacious goal** – a clear and compelling catalyst that serves as a focal point for effort – and a **vivid description** – vibrant and engaging descriptions of what it will be like to achieve the big audacious goal.

#### CORE IDEOLOGY

##### Core Purpose:

To help firms and members achieve professional growth and success.

##### Core Values:

- Continual learning
- Innovation – proactive forum for the exchange and discussion of ideas
- Sense of community – belonging to a group of diverse members who share similar aspirations and responsibilities
- Elevating “our role”/belief in the values
- Professionalism and integrity
- Education – provide programs to help our members succeed and grow. Programs and services enhancing skills and knowledge and promoting thought leadership.
- Enjoyable experiences – passion, engagement, reward in the experience
- Knowledge Sharing – exchange of ideas; share expertise and insights and ideas for the benefit of others.
- Networking – building relationships for mutual benefit
- Leadership – proactive, stance in the establishment of best practices for our profession; strategic, innovative, forward thinking
- Connect – fostering an environment of community; facilitating a mutually beneficial networking experience
- Appreciate – recognizing member contributions

#### ENVISIONED FUTURE

##### Big Goal:

Be essential to the success of CPA firms and accounting marketers and influential to the future of the accounting marketing profession

##### Supporting Statements:

- Partners will insist that marketing and business development professionals be AAM members
- Every week, AAM members will find value in their membership
- All AAM members will be versed in accounting legislation, trends and updates
- We will be a resource for small firms, in addition to AICPA's PSpC

- We will achieve and continuously elevate the position of information, knowledge and thought leadership in the accounting marketing profession.
- We will be the go-to source for accounting marketing insight, innovation and thought leadership
- AAM will have a strong senior membership presence
- For relevant accounting issues that impact our members and firms, AAM will have a relevant response
- AAM members will be valued and compensated fairly in their organizations
- Regulatory bodies, associations, state societies, media, members and firms, etc. will come to AAM as the accounting marketing resource
- AAM leadership and members are top of mind for speaking opportunities, media opportunities, white papers, and university teaching opportunities
- Education event and products become the 'go-to' standard
- AAM will achieve an 'ideal' member profile: number of firms, number of members, quality/level of membership
- We will be called upon to speak and write as thought leaders
- We will set/establish standards for marketing roles in CPA firms
- We will raise visibility for marketing functions in CPA firms.
- We will demonstrate that marketing is essential to a CPA firm's success

*AAM's strategic long-range plan must be based in part on a projected view of the future environment of the industry and the relevant world at large. **Foresight** about the relevant future is what will make the long-range plan strategic. **Building foresight** requires a look at three levels of future orientation - **current conditions**, which represent our view of what exists today, **trends**, which reflect what conditions we can see today and the predictions we can make about what direction the conditions will move in, and **assumptions**, which reflect our beliefs about what will happen or how things might be in the future, not necessarily based on what we see today. When conditions change, strategy needs to be adjusted. An annual review of this thinking will help the association ensure the ongoing relevance of its strategy.*

### **Demographics/Society**

1. Continued globalization
2. Increased flexibility with work/life balance and blending
3. More experienced marketing directors attaining partner/principal status
4. Increased number of business development professionals
5. Increased number of "experienced" accounting marketing professionals
6. Higher levels of consideration for a career in accounting marketing and business development
7. Continue to be a need for cultural diversity in the way we market and communicate our services to future employees and the market.
8. Demographic changes in firm leadership
9. Increase in the size of firms
10. Focus on growth and Business Development

### **Science/Technology**

1. Communications, information and responses will continue to be quicker and driven by client preferences
2. Increase in use and integration of communication channels
3. E-based tools will continue to drive introductions but will not replace relationships
4. Technology will allow us to better measure results/activities and increase accountability
5. Data driven marketing and prospecting will allow us to analyze purchasing behaviors
6. The ongoing expansion of media channels will reduce control over information in the market
7. Continue to be more info, more channels for communication furthering a need for stratification – filter message through clutter.
8. Technology will continue to affect buying behaviors of customers
9. There will be an increase of non-traditional networking

### **Government/Regulatory**

1. International convergence of standards
2. Major shift in the worldwide economic climate

3. Capabilities gap between regulatory requirements and firm capabilities to implement
4. Increase in government regulations leads to potential increase of services
5. Increased accountability of accounting professionals and firms

#### **Industry Structure/Competition/Global Business Climate**

1. The current global economic crisis will dramatically impact the way our clients do business, how we serve them and the accounting industry overall.
2. International alliances will continue to grow in importance to increase competitiveness.
3. Globalization will continue to introduce new risk exposures.
4. Global business issues such as IFRS, XBRL and enhanced business reporting will impact the way we do business.
5. Increase of regulations and standards will be more than an accounting issue
6. Merger and acquisition activity will continue to increase
7. Firms will need to specialize to remain competitive
8. Recruiting will no longer be a top issue (quality versus quantity)
9. Outsourcing could be less of a hotbed issue
10. Shift in governance of firms, from partnership to corporate (president/CEO) structure
11. Increased focus on succession
12. Increased focus on international business
13. Increase in niche boutique firms
14. More national and international firms
15. International reporting standards will be in effect
16. Increased competition between firms at all levels
17. Increased pressure on marketing ROI and results

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~ 3-5 YEAR PLANNING HORIZON  
OUTCOME-ORIENTED GOALS ~

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*Goals are outcome-oriented statements that represent what will constitute the organization's future success. The achievement of each goal will move AAM towards the realization of its vision. The goals are not in any order of priority. Every goal will need to be accomplished if the organization is to fully achieve its vision.*

*On the next pages, each goal is accompanied by a set of objectives, which represent key issues affecting AAM's ability to achieve the goal and articulate milestones against which to measure progress.*

**GOAL #1 – PROFESSIONAL COMPETENCY**

Industry professionals and member firms will benefit from educational programs and individuals will be recognized for their competency in accounting marketing.

**GOAL #2 - KNOWLEDGE AND INSIGHT**

AAM will be a comprehensive source for its members to access industry trends and indicators.

**GOAL #3 – COMMUNITY AND NETWORKING**

Members will grow and succeed through forums that allow for the exchange of ideas and experiences

**GOAL #4 – MEMBER VALUE**

All members will receive value through engagement, interaction and satisfaction.

**GOAL #5 – INDUSTRY LEADERSHIP**

AAM will be the universally recognized authority on accounting marketing issues, trends and best practices.

**GOAL #6 – IMPROVE OPERATIONS**

AAM will streamline operations to implement ways of becoming more efficient in maximizing use of resources (money, staff, and volunteers).

**GOAL #1 – PROFESSIONAL COMPETENCY**

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Lead Committee(s): Education

**Goal:**

Industry professionals and member firms will benefit from educational programs and individuals will be recognized for their competency in accounting marketing.

**Objectives (listed in priority order):**

1. Complete, distribute and promote Marketing Role and Salary Survey.
2. Coordinate, integrate and enhance the deployment, promotion and communication of educational efforts.
3. Improve and enhance on-line educational programming (using membership survey data) to increase AAM revenue.
4. Consolidate online educational resources into an easy-to-access format. Create and maintain online education library.
5. Re-develop of AAM Speaks! Program.

Consider for 2011:

- Expand educational support to AAM state chapters to improve the quality and quantity of training programs.

## **GOAL #2 – KNOWLEDGE AND INSIGHT**

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Lead Committee(s): Communications

### **Goal:**

AAM will be a comprehensive source for its members to access industry trends and indicators.

### **Objectives (listed in priority order):**

1. Develop communication strategy to distribute collective wisdom and relevant industry developments to members utilizing 1 email blast per week, AAM web site, and other social media tools.
2. Develop a think tank of industry professionals to feed hot topics and current information to the association.
3. Develop methods to enable members to stay abreast of current issues and address.

Consider for 2011:

- Study viability of developing a professional journal for members that may also be offered/sold to others.

### **GOAL #3 – COMMUNITY AND NETWORKING**

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Lead Committee(s): Conference, Membership, Education, Chapter Resource, HQ

**Goal:**

Members will grow and succeed through forums that allow for the exchange of ideas and experiences.

**Objectives (listed in priority order):**

1. Increase opportunities for firms and members to network on local, regional, and national level.
2. Identify ineffective programs and determine cross-purposing potential.
3. Increase opportunities for members and firms to access best practice and education among different firm demographics, experience levels and geo-location.
4. Develop mentoring program delivered thru multiple channels (focused on skill set).
5. Identify and leverage membership connections to other alliances.
6. Identify and leverage membership connections with alliances to increase networking opportunities with domestic and international accounting marketers and firms.

#### **GOAL #4 – MEMBER VALUE**

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Lead Committee(s): Conference, Membership, Chapter Resource, Education, HQ

**Goal:**

All members will receive value through engagement, interaction and satisfaction.

**Objectives (listed in priority order):**

1. Increase member satisfaction through the Summit by offering content relevant to attendee levels and roles, affordable costs, providing networking opportunities across levels and roles.
2. Increase membership by targeting managing partners, Canada, and chapters.
3. Develop new solution for Discussion List (online community).
4. Stress volunteering on committees as a membership benefit.

**GOAL #5 – INDUSTRY LEADERSHIP**

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Lead Committee(s): Board

**Goal:**

AAM will be the universally recognized authority on accounting marketing issues, trends and best practices.

**Objectives (listed in priority order):**

1. Solidify relationship with AICPA.
2. Develop process for Identifying and disseminating key emerging issues.

## **GOAL #6 – IMPROVE OPERATIONS**

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Lead Committee(s): Headquarters, Board, Chapter Resources

### **Goal:**

AAM will streamline operations to implement ways of becoming more efficient in maximizing use of resources (money, staff, and volunteers).

### **Objectives (listed in priority order):**

1. Review organizational structure (roles & responsibilities) and investigate utilizing task forces to achieve strategic projects.
2. Develop Chapter Manual outlining roles of staff, and providing resources for chapters.
3. Develop Policy & Procedure Manual
4. Restructure sponsorship and advertising prices, policies and opportunities.

*A SWOT analysis is an effective way of gaining insights regarding an organization's assets and liabilities and also to identify what's happening in its external environment, When performed on an annual basis, it can assist in identifying areas for development and can be the basis of the organization's strategy for future advancement.*

**Strengths:**

- Educating new members – best practices
- Networking opportunities
- Education
- Conference
- Recruitment of new members
- Resource pool of expertise at all levels
- Roundtable conference calls – firm size and seasoned marketers
- Number of senior members, though a challenge to maintain
- Unified passion amongst members
- Discussion List usage
- Clearly defined niche for combined information in marketing/accounting
- Program expansion – more educational offerings/value
- Commitment from the board of directors
- Strong membership growth
- Education needs to new marketers
- Networking needs are met for all
- Program expansion
- Willingness to share
- Fortified resource pool
- Conferences
- Unified impression of passion and energy
- Educating new accounting marketers
- Networking opportunities to members
- Growth in membership
- Continually keeping current programs 'fresh'
- Willingness to share
- Number of leaders at senior level firms
- Knowledge
- Conference
- Recruiting new members
- Members
- Financially stable
- Education
- Seasoned marketer roundtables
- Firm size roundtables
- Commitment for being better – vision for the future
- Members willing to step up
- AAM HQ
- Membership numbers
- Networking/best practices
- Education offerings
- HQ, volunteers experts/professionals
- Have both an internal and external perspective
- Seasoned professionals

- Marketing within the profession is new
- Clear niche
- Trusted advisor relationship – not end-delivery

**Weaknesses:**

- Who is our client – the firm or the member?
- Possible gravitation in membership from individual to firm?
- Educating and retaining experienced people – ongoing
- Association should be thought leaders – how can we push relevant information to those who need it?
- Need to strengthen our ways/frequency of communicating information – members and industry (alliances – Leest, Stimpson)
- Number of members versus committee/task needs
- Resources and support at cmte and HQ levels
- Need more focus and execution plans
- Not promoting accounting marketing as a whole
- More accounting training and senior marketer education is needed
- AAM communication
- Lack of integration in communication
- Brand definition and communication
- Poor execution
- Relationships and collaboration within peer organizations
- Limited chapters/geographic connections for all members
- Lack of market analysis
- Accountability of volunteers
- Protection of sacred cows
- Processes in place for decisions
- Educating and retaining experienced marketers
- Collaboration w/AICPA, et al; thought leadership
- Lack of mentor program
- Not serving the needs of firms without marketing professionals
- Learning best practices from other associations
- List serv searches
- HQ resources
- Formalized orientation process for committee chairs/board/members
- Draw more to volunteers and create task forces
- Execution
- Promotion
- Better focus
- Conference location selection process
- Need faster decisions
- Need more thought leadership
- Need to better communicate the organization's core values to the membership
- We are a volunteer organization
- Losing senior talent
- Need more educational opportunities/choices
- Need to align with more CPA societies and other organizations

**Opportunities:**

- Better educate members about not only the marketing aspect, but the accounting profession in general.
- Educate members that knowing the full picture IS important.

- Large and growing experience base within the membership
- Lead the association as a knowledge-base organization
- Clear outline of what can be brought to the table at the various levels (i.e. – director, manager, associate, etc.) – similar to the past AICPA document from about 15 years ago.
- Look for an opportunity to teach our employer the role and expectations of marketing. Increase awareness.
- Serve firms without marketing professionals
- Emerging workforce market
- Restructuring governance (task forces)
- Shift to growth market
- Define industry best practices
- Collaboration