




Buying in: Engaging staff and driving change in a CPA firm

Martha Banner



A photograph of two young women with long blonde hair, one in profile and one from behind, talking at night. They are wearing dark jackets with fur-lined hoods. The background is dark with some green foliage and a soft light source.

Take a minute
to connect with
your neighbour

#QBConnect | WiFi: QBConnect

CPD Process

In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

Today's speaker



Martha Banner

National Manager, Cloud Practice Development

Grant Thornton LLP

@mnbanner

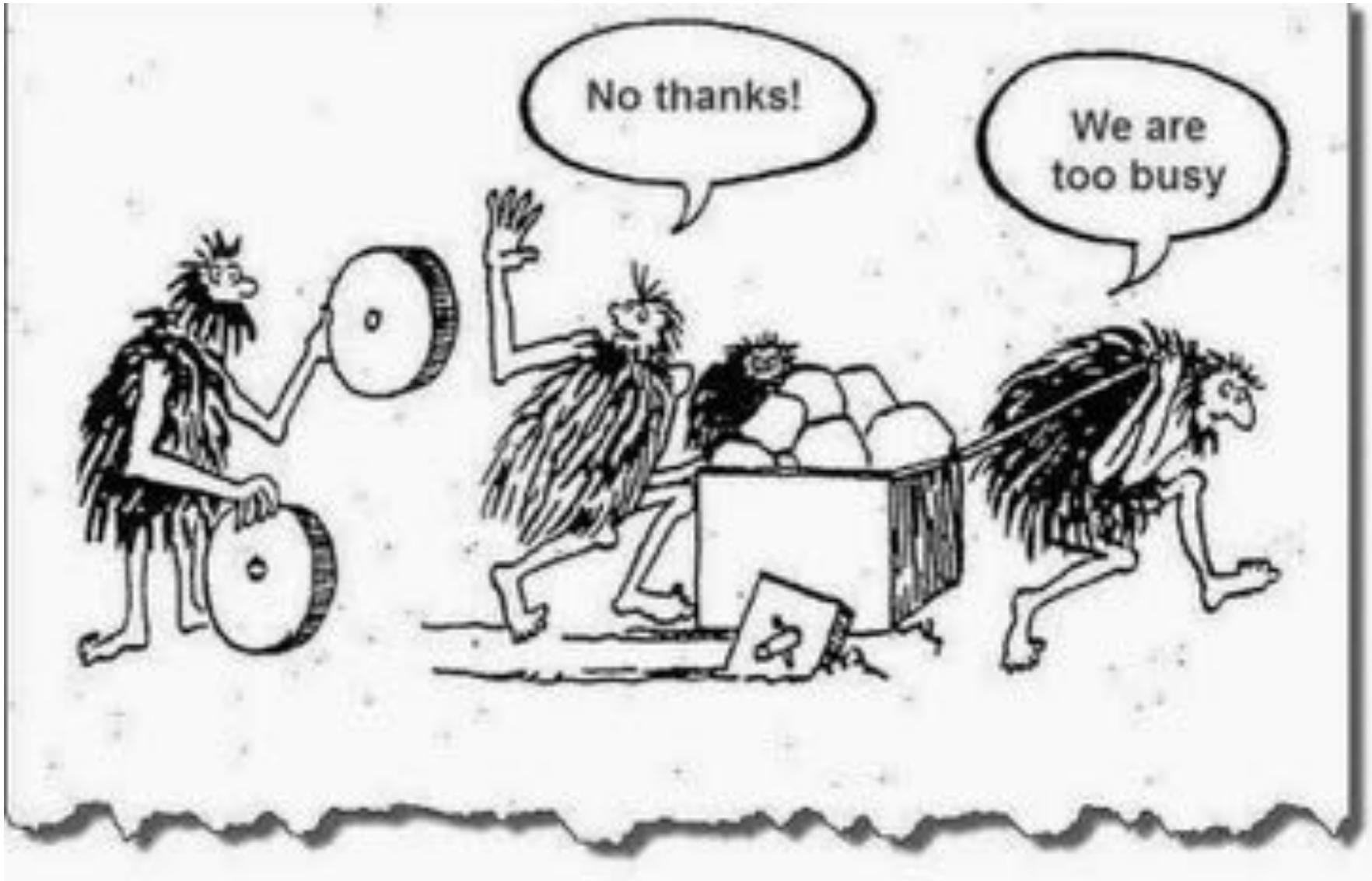
Agenda

Defining Change

Change Framework

How to Deal with Resistance





What is change management?

Change management is managing the PEOPLE side of a new process, tool, technique or service.

Framework for change

Identifying stakeholders

Vision creation

Define outcomes and goals

Change leaders

Measurement

Adapt and change



Identifying stakeholders

Partners

Managers

Staff Accountants

Clients



Vision creation

Possible Questions:

What do you hope to achieve?

How do you hope to be perceived?

What impact do we want to have on our clients, team and community?



Define outcome and goals

Tier One Goals Examples

Convert 10 clients into cloud within 6 months internally.

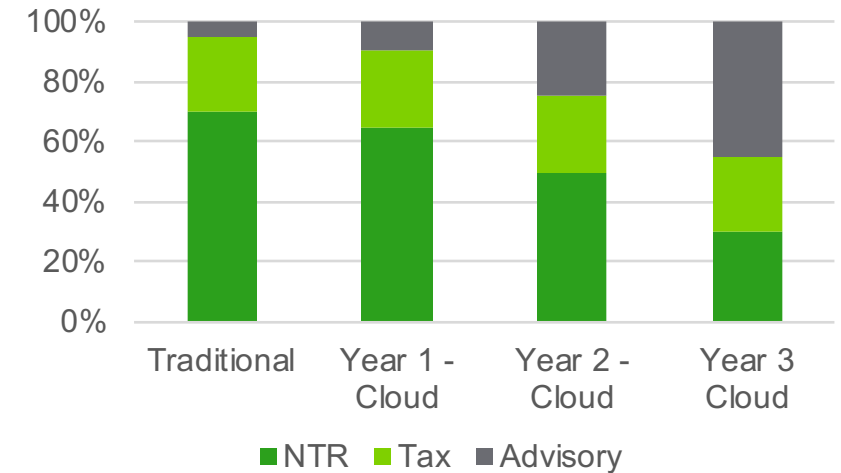
Tier Two Goals Examples

Explore and implement 2 third party applications within 12 months.

Tier Three Goals Examples

Provide quarterly KPI reporting for 5 clients within 2 years.

Change in Work Type by %



Change leaders

Open and willingness to embrace something new

Inspires others to action

Effective communicator

Resilient



Measurement

Review progress on at least a monthly basis

Goals and outcomes aligned

Colleague engagement



Adapt and Change

It will not be perfect

Flexible mindset

Learn from the mistakes or failures

Revisit to adapt and change



Resistance

Not my client.

Cloud is unsafe – what about security?

Was not great before.

I have no time to change.



Recap



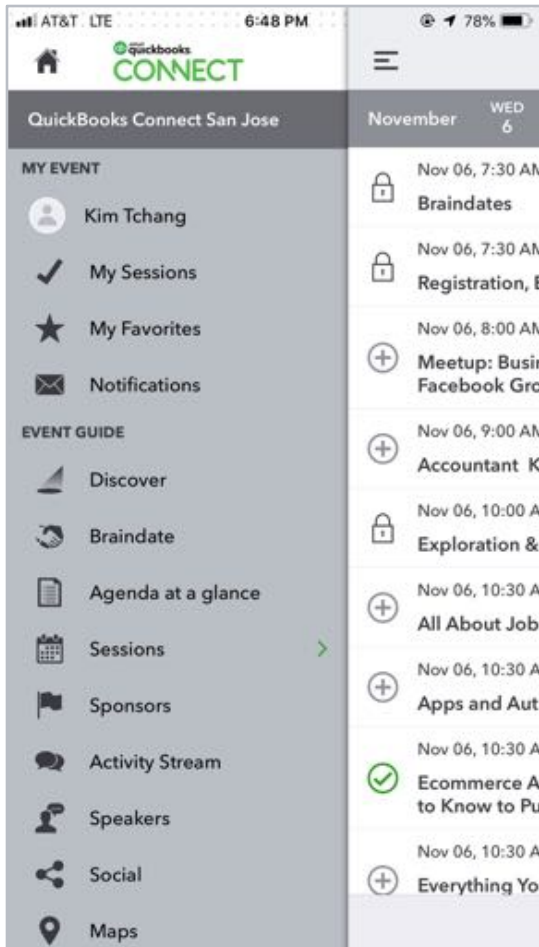


Questions?

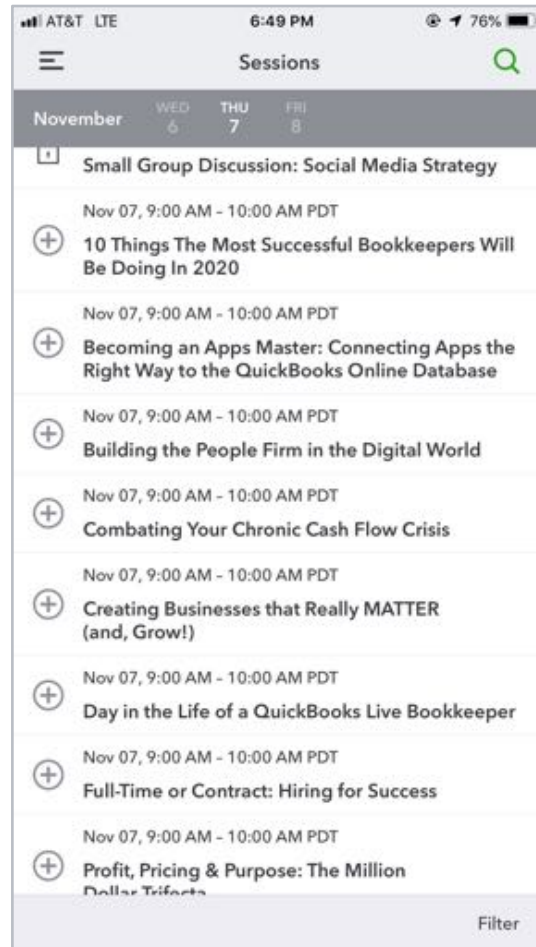
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

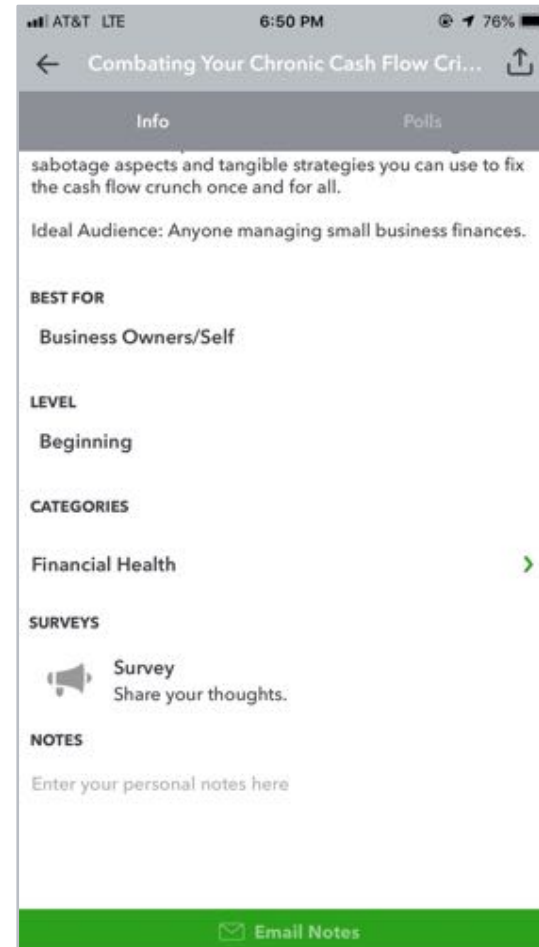
1. Select Sessions



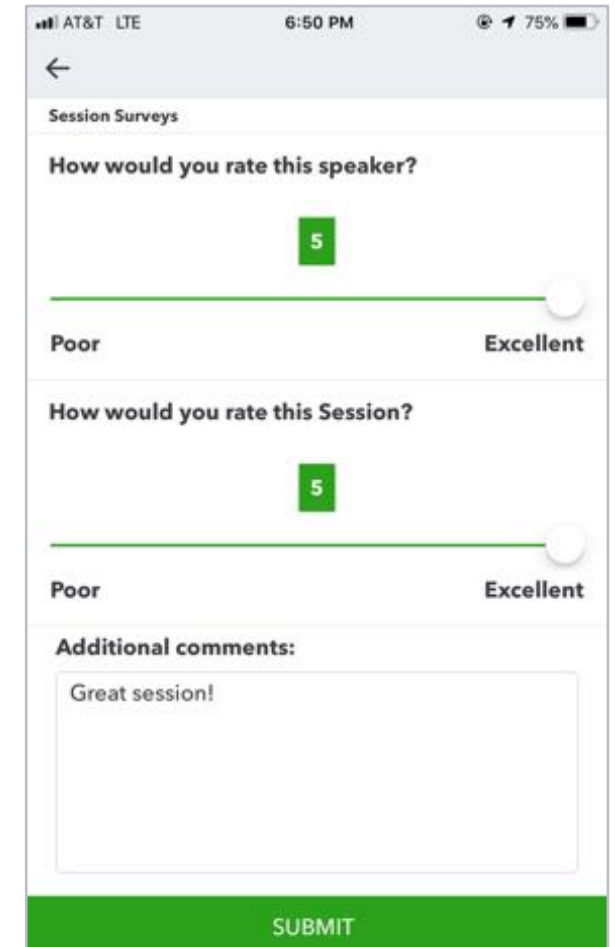
2. Select Session Title



3. Select Survey



3. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://can.quickbooksconnect.com/agenda/>

The screenshot displays the QuickBooks Connect agenda for December 10, 2023. At the top, there are navigation links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. Below this, the date 'December 10' is highlighted, with 'December 9 Accountant Day' and 'December 11' also visible. A 'Print Agenda' button is located in the top right corner. A descriptive paragraph follows, stating: 'Attend breakout sessions to learn strategies to grow your business, how to hire and build an ideal culture, tips to improve your financial health and more. Connect with peers and experts for one-on-one learning. More information coming soon.' Below this is a search bar labeled 'Search for sessions'. A 'Filters' section contains buttons for 'Organizational Culture', 'Life & Business Skills', 'Technology Training', 'Business Growth', 'Advisory', and 'Financial Health', along with an 'Expand all +' link. The main content is a list of sessions with their times and titles, each with a '+' icon for expansion. The sessions listed are: 7:30-9:00 am: Registration, Breakfast & Exploration; 8:00-8:45 am: Meetup: New to Networking; 9:00-10:00 am: Morning Keynote; 10:00-11:00 am: Exploration & Connection; 10:15-11:00 am: Meetup: Women in the Workforce; 11:00 am-12:00 pm: Breakout Sessions. The 'Breakout Sessions' section is expanded to show details for 'Creating Your Small Business Culture'. The details include a description: 'Many solopreneurs and small business owners feel like they don't have time to work on their company culture (or that they even should). Instead, they spend most of their days working in their business rather than "on" their business. In this session, you will receive tips on how to reduce stress, improve productivity, and improve your personal fulfillment all through the nurturing of your crew, your clients, your fans, AND yourself!'. It also lists the 'Ideal Audience' as 'Business owners looking to enhance their culture.', 'Best for' as 'Business Owners/Self Employed', 'Speakers' as 'Tania Madanes', 'Location' as 'Room 201 CDEF', 'Track' as 'Organizational Culture', 'CPD Hours' as '1', and 'Level' as 'Introduction'. Below this, two more sessions are listed: 'Understanding Personalities for Better Communication' and 'How to Use QuickBooks for Your Small Business: Introduction', both with '+' icons.

 **CONNECT**

OWN
THE
FUTURE
FUTURE