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the links between the relative success of CPA firms and their approach to professional development.

Jul. 21, 2016



The **Ohio Society of CPAs** (OSCPA) is teaming with **CPA Trendlines Research** and **Michael Ramos + Associates** to conduct an extensive study of CPAs' learning plans, attitudes and behaviors. The partnership is part of an effort to uncover the top trends and best practices in professional development in the tax and accounting industry.

The study, already underway and in the preliminary reporting stages, is examining the links between the relative success of CPA firms and their approach to professional development.

Professional tax and accounting practitioners are invited to join the survey at: <https://www.research.net/r/CPE16>

“Recent studies have focused on individual preferences for CPE and professional development,” said Josh Goldman, CAE, vice president, learning, OSCP. “We wanted

to take a different approach by focusing on the return on investment a growth-

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“When it comes to professional development, most firms leave huge amounts of money on the table. The key is NOT to shop for cheaper CPE,” said Michael Ramos, principal, Michael Ramos + Associates. “Instead, firms should take a more strategic approach to how they manage their learning function and demand a higher return on their spend just like they would from any other investment. The survey shows more successful firms are moving in this direction.”

Preliminary results are already showing that the top priorities for continuing professional development this year are led by tax issues.

“Tax preparation and tax planning for individuals and for businesses is at the heart of what CPAs may be best known for,” said Rick Telberg, president and founder of CPA Trendlines Research. “And with the uncertainties looming in a presidential election year, CPAs know they can’t afford to miss a beat.”

### **Research Focus & Findings:**

- Qualitative analysis of the essential ingredients for firms to succeed this year
- Comparison of ranking professional development by topics for this coming year
- The rationale’s of those choosing essential skills or specialty areas to focus as a growth driver
- The gap between alignment of critical success factors and professional development
- Comparison of hi-performing and low-performing professional service firms regarding:
  - Learning agenda focus
  - Culture of innovation
  - Alignment of learning programs to firm’s future, strategy and vision
  - Engagement by senior leadership in learning programs

- Performance multipliers for working with the best professional development

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