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Chris Horne • Jun. 23, 2017



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As advancing technology and generational shifts transform the accounting profession, forward-thinking firms who are looking to attract and retain top talent are increasingly recognizing the value of a comprehensive learning curriculum. By developing a firm-wide learning vision, you can ensure your staff not only remain CPE compliant, but also possess the skills necessary to enable success for your firm now and in the future.

In today's ever-changing tax and accounting environment, implementing a learning strategy and fostering a culture of growth is arguably one of the most important undertakings for future-ready firms. Here, we take a look at why.

Addressing the generational shift

More than one in three American workers today are millennials, and, as of the first quarter of 2015, have surpassed Generation X to become the largest share of the American workforce.^[1] Millennials are eager to learn and have a thirst for knowledge. In fact, career progression, professional development and frequent feedback are among the top priorities for this group.

"All generations in the workplace need to learn, develop, share and teach, but millennials, especially, expect it," says Jex Varner, a consultant with the AuditWatch

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You can be brilliant technically, but if you are unable to listen to and understand the client, communicate effectively and see things from their viewpoint, you are probably going to have a difficult time showing what you know technically and using that ability and knowledge to solve clients' problems," says Varner.

The pitfalls of short-sightedness

Even amidst the immense change facing the profession, many firms take a short-sighted approach to learning because they worry staff will leave for other opportunities. Experts argue otherwise.

"Sometimes employers think, 'I'm going to invest in training and then my associates are going to leave'," says Shawn O'Brien, Senior Consultant and Business Development with AuditWatch. "Well, the problem with this thinking is, if you don't invest in the training, what if they stay?"

Further, many do not realize the accounting profession can prove to be a small world.

"A lot of times when associates leave, they go work for potential clients. You want to treat them right because then you have a potential client you might cross paths with again. Or they might go work with a client you already have. In that case, you want somebody competent to be working for that client," says O'Brien.

Building a successful curriculum

If you are ready to build a comprehensive learning curriculum, it is important to remember that one size does not fit all. However, taking these three phases into account can lay the foundation for success.

1. Use the past to inform the future.

Think about what your firm has done in terms of learning/education within the past

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into the annual evaluation process to ensure you have input from team members at every level.

“Where I think firms don’t always make the connection is what courses have been taken or what courses should be taken compared with the competencies needed for each level within a firm,” O’Brien says. “As an example, I’ve seen firms that may send a number of people to the same conference. Conferences are good; they are great for networking, but did the firm need to put all their eggs in one basket? Or could they have sent them to five different [conferences] for the same spend and part of what the attendees bring back is knowledge sharing across the firm?”

3. Develop a learning plan.

The ultimate goal, of course, is to develop a personalized, multi-year growth plan for your staff. If you do not have a learning and development director, it might be good to consider adding that role. You may also want to consider turning to an outside training and consulting team to assist in the process.

“Start with the creation of a needs assessment and then figure out how to fill those gaps between the needs and the current training offered. To me, that’s the flow of how I create a curriculum plan,” said O’Brien. “After that, it just takes some proactive work — by a learning development director or somebody who is assigned to it as an audit person or a tax person — to work through their evaluation process, through mentoring. This is how we are going to lay out your next 12 months.”

In the end, your firm’s learning plan should support your overall strategic goals. Firms that embrace the power of learning and follow best practices when implementing a comprehensive learning curriculum are those that are best positioned to address the changing landscape of the profession.

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^[1] R. F. (2015, May 11). Millennials surpass Gen Xers as the largest generation in U.S. labor force [Web log post]. Retrieved from <http://www.pewresearch.org/fact-tank/2016/05/16/millennials-match-baby-boomers-as-largest-generation-in-u-s-electorate-but-will-they-vote/>

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