



**PrimeGlobal**

*The Association of Advisory  
and Accounting Firms*



EUROPEAN FEDERATION  
OF ACCOUNTANTS AND AUDITORS  
FOR SMES

# **ROLE OF PAOS – ATTRACTING / RETAINING / UPSKILLING SMP MEMBERS**

May, 2023





# PrimeGlobal

- **306** advisory & accounting firms
- **940+** locations worldwide
- **Top 3** association globally – combined revenue \$4.3 bn
- **Diverse membership** small, medium and large firms
- **Our Strategy**

*Ensuring member firms remain relevant and competitive so they provide the advice their clients need now and in the future.*

*We will partner with reputable organizations which enhance our position in the profession*



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Professional accountancy organizations (PAOs) play a crucial role in attracting, retaining, and reskilling their small and medium-sized practices (SMPs) members. Here are some ways in which PAOs can support their SMP members:

1. Attracting SMP Members:

PAOs can attract SMP members by creating an environment that fosters professional development and growth opportunities. They can offer access to training and certification programs, provide networking opportunities, and establish relationships with universities to promote accounting as a career.

2. Retaining SMP Members:

To retain SMP members, PAOs can provide ongoing support through mentoring programs, continuing professional education, and access to technical resources. They can also offer advocacy services to protect the interests of SMP members and help them navigate regulatory and legislative changes.

3. Reskilling SMP Members:

To reskill SMP members, PAOs can offer training and certification programs that focus on emerging technologies, such as artificial intelligence and blockchain. PAOs can also provide resources to help SMPs stay up to date on regulatory changes and best practices.





**Attractive**

**Meaningful**

**Flexible**



**Attractive**

**Meaningful**

**Flexible**

**WE HATE ACCOUNTING!!!**


WE HATE ACCOUNTING!!!

WE HATE ACCOUNTING!!!








**Marlies Vervoordeldonk** • 2nd  
 Joanknecht | Strategy | Policy & Support | Marketi...  
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Workation part I | First day at the office of **Alberto De Giorgi** and **Giorgio De Giorgi** in Milan. During the weekend I explored Milan and its surroundings, the upcoming days I work from here for **Joanknecht**. Thanks for the warm welcome!

[#workation](#) [#Milan](#) [#primeglobal](#) [#connections](#)  
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# TOP TIPS FOR SUPPORTING DEI IN THE WORKPLACE



**PLAY AN ACTIVE ROLE**



**BE A PROUD ALLY**



**IMPROVE YOUR UNDERSTANDING**



**FIND CONNECTIONS WITH COLLEAGUES**



**IMPROVE WORKPLACE COMMUNICATION**



**BE PASSIONATE AND SPEAK OUT**

The screenshot shows the AICPA website interface. At the top left is the AICPA logo. To the right is a search bar with 'AICPA.org' and a search icon. Below the logo is a navigation menu with dropdown arrows for 'Topics', 'Career Guidance', 'CPE & Learning', 'Certifications', 'News & Advocacy', and 'Membership'. A breadcrumb trail reads: 'AICPA > Topics of Interest Overview > PCPS > PCPS Human Capital Center (HR Resources) > PCPS Diversity and Inclusion Toolkit'. The main content area is split into two columns. The left column is titled 'PCPS Human Capital Center' and is currently empty. The right column is titled 'PCPS Diversity and Inclusion Toolkit' and features a large image of three diverse people: a Black woman, a man with glasses and a beard, and a white woman, all smiling.

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OF STUDIO DE  
GIORGI E ASSOCIATI  
APPOINTED  
PRESIDENT OF FCM**



// You can be whatever you want with accounting //

Watch Janiya ▶



Article

What's so great about accounting?



Article

Accountants are the New Avengers



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“ Growing up not knowing any accountants, ***I equated a career in accounting with book keeping***, but the upcoming climate reporting disclosure requirements reiterate that it is much broader.





## EFAA Publishes Guidance for SMPs on Sustainability Reporting Assurance (EFAA)

ENVIRONMENTAL SOCIAL RESPONSIBILITY

May 10, 2023

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# B CORP WORKBOOK

European Federation of Accountants has continued its commitment to and medium-sized accountancy (s) by publishing a guide on Reporting Assurance.





# WELLBEING AT PRIMEGLOBAL

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IAB PRESS INTERVIEW

**BUSINESS OPPORTUNITIES**



## IAB: Building a strong culture in a hybrid workforce

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### Carpenter Box has Viral Success on TikTok with 1.5 Million Views

TECHNOLOGY  
August 3, 2022 - Carpenter Box

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This is a thought leadership article from PrimeGlobal member firm [Carpenter Box](#) on how they successfully utilized the powers of digital marketing recently when they created a TikTok video to promote the business' recruitment campaign to younger people. And it's gone viral!

Got a success story to inspire others? Why not [submit an article](#).





*“Empowering and equipping business and accounting professionals with leading-edge tools is the start, you need to upskill them with additional knowledge and techniques and develop their ability to think more innovatively and better lead clients through change”*

**Donny Shimamoto, CPA, CITP, CGMA at MGA**



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# Leadership Development Program

## Become an Effective Leader

PrimeGlobal has developed a range of leadership programs. Developed in conjunction with well-known public accounting leadership consultants and faculty, there are two distinct tracks to address critical points in career development. Learn about each of leadership programs below and start your journey today.

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DISCUSSION FORUMS / MY FORUMS

AH

**Technology - EMEA & NA**

About this forum

**NJ** Nathan Jang Posted 11 days ago

**Feedback on Audit Dashboard and Sharefile**

We are currently utilizing Sharefile for sending / receiving client files and for the client file request workflows. Has any firms looked at or used a product...

Audit Software Technology

2 0

**JP** Jonathan Phillippe Posted 11 days ago

Question

**New Cloud Software Policy**

What policy do other firms have in place to help direct the process of selecting new cloud based products. How much involvement is given to IT and when in the process. Are you always given administrative access to the products for ongoing review, or just during initial setup?

Firm Policies Technology

**JP** Jonathan Phillippe Posted 11 days ago

Technology - EMEA & NA Question

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What policy do other firms have in place to help direct the process of selecting new cloud based products. How much involvement is given to IT and when in the process. Are you always given administrative access to the products for ongoing review, or just during initial setup?

Firm Policies Technology

2 0

**2 Comments**

**RG** Robert Green Replied 11 days ago

What sort of cloud software are you discussing? Depending on the purpose, IT's involvement may be limited to extensive. Trying to understand the nature of why

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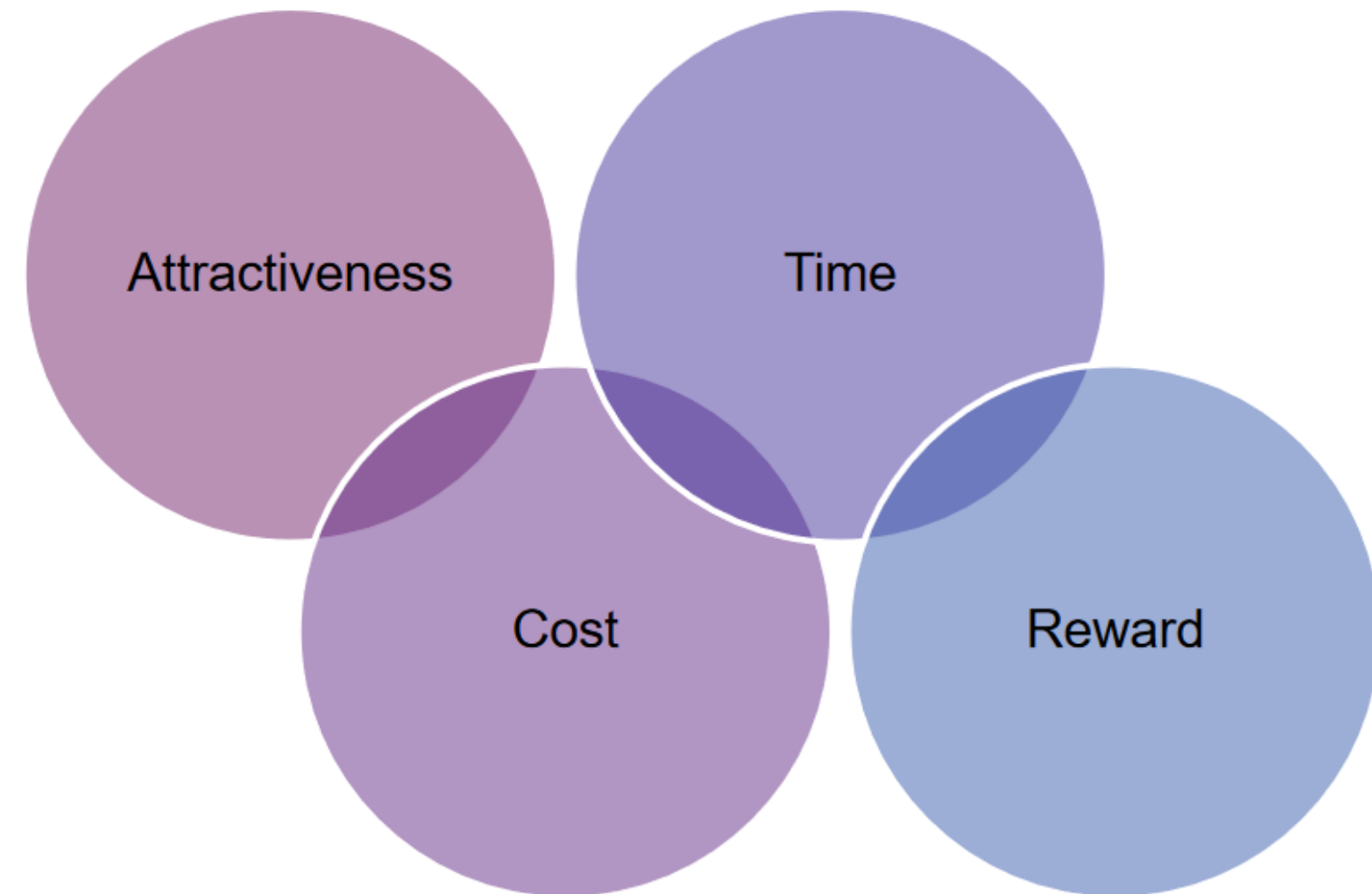
# Work in Partnership

We must address the **ecosystem** of **attractiveness, cost, time, and reward** as a barrier to entry into the profession.

**This includes** CPA firms, universities and the regulatory community.

We will create a dialogue on the broader issues impacting the attractiveness of the CPA profession and creating positive and measurable change.

*Timing: Communications by spring 2023 and ongoing*







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The background is a composite image. On the left, a portion of the Earth is visible, showing city lights at night. On the right, there is a bokeh effect of colorful, out-of-focus lights in shades of yellow, orange, and purple. The text 'Thank you' is centered across the middle in a large, bold, white sans-serif font.

**Thank you**