



Embracing Change

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of learning to stay ahead.**

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Leslie Balmforth

Partner in-Charge of Learning and Development, Aprio

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Whether caused by new technologies, tighter regulations or global events, adaptation is necessary to stay relevant in a competitive industry. Among CPA firms, where mergers and acquisitions are commonplace, change often is reflected by adding a new partner to a name plate.

But sometimes, it is more organic — an internally driven shift in the philosophies and culture of a firm. For Aprio, a name change two years ago symbolized the firm's emphasis on bringing technical expertise, deep engagement and genuine care to client work. In fact, the name Aprio was chosen because it means "head and heart."

Previously known as Habif, Arogeti & Wynne LLP, Aprio's commitment and vision extends to its employees to provide them with the best team-member experience. Learning and development plays a critical part of that re-imagined experience.

In recent years, the firm launched Aprio University to help employees advance their careers. Today, the firm continues to make impressive investments in learning and development.

"We invest in our clients' success by investing in our own," Aprio's Partner-in-Charge of Learning and Development Leslie Balmforth says. "We know our learning and development spend per full-time employee is significantly higher than the industry average. This reflects a deliberate investment we started back in 2015, when we were strategically planning for 2020. We knew that providing our associates with the most rewarding career experience and development opportunities would be key to achieving future growth."

AICPA conferences also aid in fueling that growth, as well as the firm's competitive position. "With the help of a variety of industry-specific AICPA conferences, Aprio has been able to acquire the technical astuteness and critical skill sets necessary to build a competitive advantage in the industry," Leslie confirms.



Top-notch learning content

Aprio University consists of curriculum-based learning programs focused on technical, leadership, advisory, management, communication and technological programs. All this is supplemented by a full-time technical trainer and an online library of 700+ courses and webinars, offered through the university's LMS platform. Aprio incorporates gamification and virtual reality to further motivate and engage learners.

Aprio often combines its own programs with AICPA conferences to further its commitment to continuous learning. For example, AICPA ENGAGE combines seven conferences into one annual event, offering a wealth of learning opportunities to help attendees navigate industry change, from tax reform to automation and evolving client needs.

"The content of ENGAGE is amazing," Aprio's Vice President of Human Resources Larry Sheftel about his firm's participation says. "The cross-section of topics

allows our employees to choose the areas where they will receive the most benefit, and the speakers are some of the best around."

Aprio employees from many areas of the firm attended the 2018 ENGAGE event — from tax, audit and business development to IT, HR and operations.

"The amount of information and networking that goes on during the ENGAGE conference is invaluable," Larry continues. "The sessions are always informative, but with 3,000+ attendees, it's also a great place to network. To hear first-hand what is going on with the profession, and what changes are coming, allows us to be more proactive and less reactionary. We bring that knowledge back to the firm, and we are able to make the strategic changes necessary to push the firm forward."



Energizing experiences

In addition to ENGAGE, the firm sent key team members and executives to the 2018 Women's Global Leadership Summit. This an annual AICPA event is devoted to enhancing the skills and potential of women leaders in the financial community.

Among those chosen to attend the Summit was Aprio's tax manager, Mary Kathryn Williamson, a CPA who began with Aprio as an intern more than four years ago. Today, she is on the firm's Women's Steering Committee, Excelle, which supports and encourages female growth within Aprio.

"The AICPA is a trusted source for learning about women's issues and how they relate the profession," Mary Kathryn says. "I was so excited to go to the Women's Global Leadership Summit, because I'd heard about it during the past couple of years, and I always wanted to be selected to attend."

At the Summit, she experienced over three days of interactive sessions and networking opportunities with over 600 leaders from across the country. The event is designed to help women succeed and advance in the profession.

"It was amazing to be there, surrounded by all these other women who are in the same industry. There was an energy in the room. It was nice to see women who have made it to the next level, or to the partner level, or the CEO level," Mary Kathryn says.

"The speakers were so inspiring as they talked about their journeys," Mary Kathryn continues. "I wanted to hear their stories, how they got where they are today, the challenges they faced, and how they were able to succeed despite the hurdles. I kept thinking: 'That could be me.' Listening to the CEO of KPMG, Lynn Doughtie, tell her story, drove home the message that, if you keep your eye on the prize, you can do it."

Firm fellowship

Mary Kathryn says Aprio was also an event supporter at the Summit. “Supporting the AICPA conference reinforces Aprio’s commitment to women in our firm and our belief in their growth. It allows our female leaders to come back and share their experiences with other women, and to use their insights to transform our Excellence program throughout the year,” she says.

Mary Kathryn also found it interesting to speak with other attendees to learn how they were implementing their women’s programs, as well as who they chose to represent their firms at the conference. “Many were very surprised that we brought our associate-level staff to the event, but we looked at it as an opportunity to share a great experience together,” she says.

Tax Partner and Co-Chair of Aprio’s Women’s Excellence Committee Jessica Hussain agrees. “By sending a diverse group with different levels of experience and expertise to the Summit, we were able to capitalize on what resonated with them, so they could share their experiences and key takeaways with other women in the firm in a subsequent forum,” she says. “We also wanted to provide an opportunity to accelerate the growth and

development of our high performers and the Leadership Summit was a great venue for that.”

Jessica notes that Aprio’s CEO Richard Kopelman also attended. “It’s really important for men to hear the same messages that women are hearing, especially as it relates to things being done, worked on or developed in the industry. It enables us to all work together to improve diversity.”

At the Summit, Mary Kathryn dined with Richard while discussing how to bolster the firm’s sponsorship program, which includes mentors and coaches to help employees reach and sustain their goals. She says the exchange reflects Aprio’s willingness to explore new ideas.

“Our culture is extremely entrepreneurial,” Mary Kathryn says. “Even though there are more than 400 people working for our firm, if you have an idea, they want to hear it, no matter what level you’re at. Anytime our CEO hosts a meeting, he says, ‘I’m open to ideas, please come to me.’ ”

New perspectives

Mary Kathryn found the conference's breakout sessions to be eye-opening. "I was able to learn more about unconscious bias, diversity and inclusion and sponsorship, and how different firms implement training programs for them," she says.

One of the most fascinating sessions to her was one on unconscious bias, a key cause of gender inequity today, led by Researcher Siri Chilazi of the Women and Public Policy Program at the Harvard Kennedy School.

To demonstrate this bias, Siri referred to a case study where attendees were provided with two profiles, one male and one female. When asked who would be more successful, more often than not, the male was chosen as most likely to succeed – even when the names on the résumés were swapped.

"I didn't really realize how impactful unconscious bias could be," Mary Kathryn says. "It goes back to how our brains developed as children, the environment that we were brought into, and how that affects your unconscious bias. You're often not even aware you have it."

"The Women's Global Leadership Summit completely exceeded my expectations. I've never been around that many female CPAs. It demonstrated that the industry is different: It doesn't look the way it used to anymore."



Staying relevant amid rapid change

Having a strategic learning partner is critical, given the rapid change in the profession. For example, to deal with the onslaught of changing tax laws, Aprio employees participated in the AICPA Tax Reform course, on-site or via webcast for remote workers.

“Our learning and development department was on top of the training we’d need in that area,” Mary Kathryn says. “Our goal was to be the frontrunner when it came to informing our clients and team members about the changes, and to have those conversations early in the game, so they would be well-prepared.”

Aprio’s responsiveness to new types of training is an example of the firm’s commitment to learning and development. “As a manager, if we see our associates and interns need more training on something, we

are 100% encouraged to ask for that to ensure we are staying on top of any relevant changes that are happening, especially in the tax world where more and more processes are being automated.”

“Considering the amount of change and disruption that is happening in our industry, we’ll continue to look to the AICPA, especially when it comes to technology changes in the tax and audit field and how AI will impact our business,” Mary Kathryn says. “They provide us with the latest and greatest in the accounting profession, so we can stay ahead in a competitive industry.”



About Aprio

Aprio is a full-service, CPA-led business advisory firm, based in Atlanta, GA. Started 65 years ago, the firm has 500 employees and also operates in New York, Birmingham, AL, and Sarasota, FL.

Aprio is recognized as a **Top 100 Accounting Firm** in the United States, and was selected four consecutive years as **Best of the Best Firm** by *Inside Public Accounting*. In addition, the *Atlanta Journal-Constitution* named Aprio as a **Top Workplace**, for two years in a row. As part of its commitment to its clients and staff, Aprio makes training a priority and has a team solely focused on learning and development.



For more information

The AICPA and its Women's Initiatives Executive Committee (WIEC) promote and support the success of women to advance the profession. For further information, visit aicpa.org/womenlead.

In addition to the Women's Global Leadership Summit, the AICPA offers over 60 conferences and workshops every year. Each event helps you and your team stay ahead of emerging trends, earn valuable CPE and network with peers and leaders across the profession.

Join Aprio and make a stand for women as a supporter of the AICPA Women's Global Leadership Summit Nov. 6–8, 2019, in San Diego. Becoming a supporter allows your organization to send multiple registrants and show your support for diversity and inclusion within the profession. Visit bit.ly/becomeasupporter for more information.

Jump into the conversation on Twitter using the hashtag [#AICPAWomenLead](https://twitter.com/AICPAWomenLead).



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