2018-2021 MICPA Strategic Plan

The Michigan Association of Certified Public Accountants
Introduction

The MICPA Board of Directors began its process for creating an enhanced strategic plan for 2018-2021 at the May 2017 Board meeting. The ideas created there were discussed at the Executive Committee's Strategic Plan Retreat in August 2017 along with observations from the CPA profession's overall perspective, to give the Executive Management Team the basis for enhancing the current plan for the coming three years. The process respects that the Strategic Plan is volunteer led and staff driven.

The result of this process is contained in the five initiatives in the 2018-2021 MICPA Strategic Plan: Membership, Advocacy, Sponsorships/Business Development, Learning and Non-CPA Membership. The fifth initiative, Non-CPA Membership, is new for the 2018-2021 period to emphasize the external forces driving change in the profession and how the MICPA must respond to stay relevant.

An overview of each initiative is as follows:

- **Membership**: MICPA is looking at finding resources for member recruitment opportunities not previously utilized, performing research that could open the doors for new member categories, and planning to utilize marketing methods to best engage the ever-changing population. The membership plan also addresses creating opportunities for members to connect with peers through Connect (also called the Hub), utilizing videos to show at firms and companies, and enhancing methods for identifying and growing the succession of the profession through the next generation.
- **Advocacy**: MICPA has its eye on the development of relationships with appropriate members of the state legislature, while planning for and anticipating changes leading up to the November 2018 state elections. MICPA will continue to be involved in projects with state government that support the CPAs unique perspective and contribute to Michigan's prosperity.
- **Sponsorships/Business Development**: Revenue generating activity will be measured and benchmarked to make the most of the exponentially influential mantra of the MICPA. Sponsors will be communicated with to ensure that the expected value is what the sponsor experienced. Longer term contracts will be pursued.
- **Learning**: The Future of Learning and Best Practices in Adult Learning are the focus for the future. This plan concentrates on unique offerings, new speakers, new learning techniques and efficient use of resources to continue the quality of programming our attendees have come to expect. In addition, the CPE Tracker will provide enhanced intel by showing MICPA what third party education is being taken and new vendors for our Association to explore.
- **Non-CPA Membership-How to expand the relevant market**: A fifth initiative has been added to separately identify the actions to be taken by the MICPA in determining how to integrate non-CPAs working in the profession into the MICPA as members.

2018-2021 MICPA Strategic Plan

Initiative: Advocacy

To enhance the voice of the profession in Lansing, build relationships, create resources, contribute to the State of Michigan's growth and show value to members/public through successes

Risks considered: Upcoming elections and change in governor and legislators; change in appointees and staff in State departments; change in leadership in house and senate;

2018 - 2019	2019 - 2020	2020 - 2021
Objective: Cultivate relationships between key officials and the MICPA **High Level Actions** • Pursue relationships with key officials as determined by November **2018** election while maintaining previous relationships to enhance the voice of the profession • Establish relationship with new governor's administration for inclusion of CPAs in valuable projects • Establish relationships with new appointed directors of LARA, Treasury, etc • Continue to enhance relationships with State Board of Accountancy members, LARA and Treasury staff • Monitor possible changes on the horizon for groups appointed by the governor, e.g. State Board of Accountancy and Committees **Tactics** • Determine potential turnover prior to 2018 State and Federal election • Revise inventory of established relationships	**Objective: Cultivate relationships between key officials and the MICPA** **High Level Actions** • Continue to enhance relationships with State and Federal legislators to strengthen the voice of the profession in the face of major turnover resulting from the November 2018 elections • Continue to enhance relationship with governor's administration for inclusion of CPAs in valuable projects • Continue to facilitate relationships with Treasurer and other directors of relevant state agencies • As November 2020 election approaches, create appropriate actions to follow the future of state officials • Continue to monitor possible changes on the horizon for groups appointed by the governor, e.g. State Board of Accountancy and Committees, therefore preparing for change	**Objective: Cultivate relationships between key officials and the MICPA** **High Level Actions** • Pursue relationships with key officials as determined by November **2020** election while maintaining previous relationships to enhance the voice of the profession • Continue to enhance relationships with State Board of Accountancy members, LARA and Treasury staff • Continue to monitor possible changes on the horizon for groups appointed by the governor, e.g. State Board of Accountancy and Committees, therefore preparing for change • Continue to facilitate relationships with Treasurer and other directors of relevant state agencies **Tactics** • Analyze and reassess the inventory of relationships with candidates for Governor, State and Federal legislature

• Reexamine the 20 key officials for changes post 2018 election • Continue to utilize resources (PAA and member feedback) to identify potential candidates for State and Federal office • Continue to understand the makeup and trends within the current legislature to identify potential 2019-2020 legislative session leadership • Cultivate relationships with the winners of the 2018 elections including newly elected leadership **Metrics** • Potential turnover prior to 2018 elections was determined • Inventory of relationships revised and updated • 20 key officials have been examined and revised as appropriate • To the extent possible relationships with potential State and Federal candidates and likely legislative leaders were established	**Tactics** • Analyze and reassess the inventory of relationships as legislative leaders are established prior to 2020 election • Proactively monitor, in light of possible movement and changes, noting those more or less likely to change through 2020 including but not limited to LARA, State Board of Accountancy and committee appointments **Metrics** • Relationships established with 20 key officials, rank-ordered by strategic position • Relationships established with 128 legislators through basic touch points • Positioned MICPA in preparation for 2020 State and Federal elections with knowledge of turnover and candidates • Cultivated existing relationships with officials and state government agencies • Monitored and affected the makeup of specific state Committees that align with MICPA's mission	• Proactively monitor, in light of possible movement and changes, noting those more or less likely to change through 2022 including but not limited to LARA, State Board of Accountancy and committee appointments **Metrics** • Relationships established with 20 key officials, rank-ordered by strategic position • Relationships established with 128 legislators through basic touch points • Positioned MICPA in preparation for 2022 State and Federal elections with knowledge of turnover and candidates • Cultivated existing relationships with officials and state government agencies • Monitored and affected the makeup of specific state Committees that align with MICPA's mission

Objective: Leverage the expertise of the CPA profession in Michigan	**Objective: Leverage the expertise of the CPA profession in Michigan**	**Objective: Leverage the expertise of the CPA profession in Michigan**
High Level Actions • Identify and seek opportunities to contribute to Michigan's prosperity **Tactics** • Pay particular attention to state "agencies/groups" that will be under appointments from a new Governor • Continued to maintain the environment and relationships to put CPAs on government committees • Lay the foundation with potentially new elected officials to ensure continuation of environment conducive to CPAs being appointed to government committees **Metrics:** • MICPA has analyzed and considered participation in new high-visibility initiatives • Monitored for new initiatives from government through touch points with policy makers • Monitored potential changes to agencies • Opportunities for committee appointments continue	**High Level Actions** • Identify and seek opportunities to contribute to Michigan's prosperity **Tactics** • Continue to enhance relationships with key policy makers including but not limited to the governor's staff to be in a position to take on new initiatives • Maintain the environment and relationships to put CPAs on government committees **Metrics:** • MICPA has analyzed and considered participation in new high-visibility initiatives • Monitored for new initiatives from government through touch points with policy makers • Monitored potential changes to agencies • Opportunities for committee appointments continue	**High Level Actions** • Identify and seek opportunities to contribute to Michigan's prosperity **Tactics** • Continue to enhance relationships with key policy makers including but not limited to the governor's staff to be in a position to take on new initiatives • Maintain the environment and relationships to put CPAs on government committees **Metrics:** • MICPA has analyzed and considered participation in new high-visibility initiatives • Monitored for new initiatives from government through touch points with policy makers • Monitored potential changes to agencies • Opportunities for committee appointments continue

Objective: Enhance members' awareness of advocacy and regulatory efforts	Objective: Enhance members' awareness of advocacy and regulatory efforts	Objective: Enhance members' awareness of advocacy and regulatory efforts
High Level Actions • Evaluate and improve existing advocacy and regulatory communications In line with members' perceived importance **Tactics** • Continue to implement an annual plan to expand non-publication communication efforts with members • Continue ways to improve current efforts through enhanced content and distribution targeting • Create and distribute a video series introducing the importance of advocacy and demonstrating the value of government relationships **Metrics:** • Have fully implemented the non-publication communication expansion plan • Create new methods of content distribution to attract new readers/viewers of MICPA advocacy news • Created and distributed advocacy video series.	**High Level Actions** • Evaluate and improve existing advocacy and regulatory communications In line with members' perceived importance **Tactics** • Continue to implement an annual plan to expand non-publication communication efforts with members • Continue to create and distribute videos supporting advocacy efforts • Develop social media calendar and marketing timeline to support advocacy efforts **Metrics:** • Create new methods of content distribution to attract new readers/viewers of MICPA advocacy news	**High Level Actions** • Evaluate and improve existing advocacy and regulatory communications In line with members' perceived importance **Tactics** • Continue to implement an annual plan to expand non-publication communication efforts with members • Continue to create and distribute videos supporting advocacy efforts • Continue to refine social media calendar and marketing timeline supporting advocacy efforts **Metrics:** • Create new methods of content distribution to attract new readers/viewers of MICPA advocacy news

2018-2021 MICPA Strategic Plan

Initiative: Sponsorships/Business Development

To Cultivate relationships that provide reciprocal value for our members, our sponsor partners and our association. The MICPA members are a highly sought-after demographic audience. We develop and deliver a wide range of relationship-building opportunities- creating several revenue streams

Risks Considered: Value delivered; need for more real estate, including shifting delivery of CPE and impact on available real estate; alignment of opportunities for both sponsors' and members' benefits; disruption from advancements in technology; perception of declining value in trade shows; competition in the market

2018-2019	2019-2020	2020-2021
Objective: All sponsors and MICPA recognize mutual value	**Objective: All sponsors and MICPA recognize mutual value**	**Objective: All sponsors and MICPA recognize mutual value**
High Level Actions • Emphasize the MICPA audience as the most important audience in Michigan business—due to the trustworthiness and "exponential influence" of the CPA Profession members • MICPA members put "the word" in all word-of-mouth business advertising • Continue to reinforce that ROI has been met with each sponsor • Compare MICPA sponsorship and exhibitor ROI value to less effective marketing choices • Ensure every sponsored content speaking opportunity is sold • Ensure all best attended conferences have a full slate of underwriting sponsors **Tactics** • Develop needs analysis of a "great" sponsor	**High Level Actions** • Emphasize the MICPA audience as the most important audience in Michigan business—due to the trustworthiness and "exponential influence" of the CPA Profession members • Continue to monitor that ROI has been met with each sponsor • Make sure that 100% of every sponsored content speaking opportunity is sold (all Spotlights and NiteOwls are sold) • Make sure that all best-attended (ie. MIS 1, MIS 2/3, MTC, NPC, GAA, Award Dinner, etc.) events have a full slate of underwriting sponsors (ie. platinum gold, silver, bronze, etc.) **Tactics** • Sell more categories of sponsor prospects (ie. car dealers, realtors, senior retirement homes, private jet services, restaurants,	**High Level Actions** • Emphasize the MICPA audience as the most important audience in Michigan business—due to the trustworthiness and "exponential influence" of the CPA Profession members • Continue to monitor that ROI has been met with each sponsor • Make sure that 100% of every sponsored content speaking opportunity is sold (all Spotlights and NiteOwls are sold) • Make sure that all best-attended (ie. MIS 1, MIS 2/3, MTC, NPC, GAA, Award Dinner, etc.) events have a full slate of underwriting sponsors (ie. platinum gold, silver, bronze, etc.) **Tactics** • Sell more categories of sponsor prospects (ie. car dealers, realtors, senior retirement homes, private jet services, restaurants,

- Develop vetting process for identifying ROI of a sponsor relationship
- Utilize technology to identify a structured process to track a history of sponsorship details
- Call the sponsor to determine the expected value was what the sponsor experienced. If the experience was not as expected, determine how it can be changed going forward.
- Manage dates when sponsorships must be sold for sponsored content slots. Obtain various topics from sponsored event speakers.
- Manage dates for all heavily attended conferences to ensure all sponsorships are sold.

Metrics
- Analyzed the number of sponsors in each category of good, great, etc.
- Using CRM, the revenue generated each sponsor was tracked
- Measured revenue increases vis a vis activity; /client satisfaction
- Utilized technology tracking history to assist with building profile of a "great" sponsor. 90% of sponsored content opportunities were sold.
- The revenue budget was able to be met for heavily attended conferences.

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golf courses, country clubs, etc.)
- Continue face-to-face follow-up calls to sponsors to determine whether the customer experience met expectations, and to make changes when it did not
- Manage dates when sponsorships must be sold for sponsored content slots
- Obtain topics from sponsored event speakers

Metrics
- Measure sponsorship and advertising revenue increases (and decreases) vis a vis each event and publication
- Monitor sales pipeline progress in weekly Business Development meetings every Friday

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- Continue face-to-face follow-up calls to sponsors to determine whether the customer experience met expectations, and to make changes when it did not
- Manage dates when sponsorships must be sold for sponsored content slots
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Metrics
- Sell more categories of sponsor prospects (ie. car dealers, realtors, senior retirement homes, private jet services, restaurants, golf courses, country clubs, etc.)
- Continue face-to-face follow-up calls to sponsors to determine whether the customer experience met expectations, and to make changes when it did not
- Manage dates when sponsorships must be sold for sponsored content slots
- Obtain topics from sponsored event speakers

Objective: Maximize and leverage the public relations value of sponsorships and partnership dollars invested **High Level Actions** • Ascribe public relations value to every relationship dollar invested • Recognize and thank all sponsors and partners continually throughout the year • Develop a sponsor testimonial campaign to reinforce ROI--due to the trustworthiness and the "exponential influence" of MICPA members **Tactics** • Track new ways to generate earned PR • Enhance a master marketing plan matching prospective sponsors with target audiences • Create profiles of CPAs to assist sponsors, prospect efficiently, better sell and identify targets. Explain exponential influence of CPAs • Regularly recognize partners and sponsors via MICPA platforms • Webpages to be added to the website for paying MICPA+ sponsors. • The MICPA + opportunity to enhance a sponsorship is added into proposals. • Marketing of the MICPA + sponsor opportunity is started with an introductory letter sent out to all MICPA members using Informz. Informz is set up to send out additional letters on the	**Objective: Maximize and leverage the public relations value of sponsorships and partnership dollars invested** **High Level Actions** • Ascribe public relations value to every relationship dollar invested • Recognize and thank all sponsors and partners continually throughout the year • Continue sponsor testimonial campaign to reinforce ROI--due to the trustworthiness and the "exponential influence" of MICPA members • Continue testimonial campaign at MIS 1, and MIS 2/3 **Tactics** • Regularly recognize partners and sponsors via MICPA+ platforms at each event and in MICPA print and digital • The MICPA + sponsor partnership opportunity will be added to ALL proposals • Review other State Associations' pricing on sponsorships and exhibitor fees and compare to MICPA's pricing • Review the sponsorship and advertising and exhibitor pricing of other state Accounting Associations • Continue testimonial campaign • Make sure every possible category is represented in MICPA+ sponsorship program (ie. car dealerships, credit unions, HR services, payroll	**Objective: Maximize and leverage the public relations value of sponsorships and partnership dollars invested** **High Level Actions** • Ascribe public relations value to every relationship dollar invested • Recognize and thank all sponsors and partners continually throughout the year • Continue sponsor testimonial campaign to reinforce ROI--due to the trustworthiness and the "exponential influence" of MICPA members • Continue testimonial campaign at MIS 1, and MIS 2/3 **Tactics** • Regularly recognize partners and sponsors via MICPA+ platforms at each event and in MICPA print and digital • The MICPA + sponsor partnership opportunity will be added to ALL proposals • Review other State Associations' pricing on sponsorships and exhibitor fees and compare to MICPA's pricing • Review the sponsorship and advertising and exhibitor pricing of other state Accounting Associations • Continue testimonial campaign • Make sure every possible category is represented in MICPA+ sponsorship program (ie. car dealerships, credit unions, HR services, payroll

MICPA + sponsor based on action taken by MICPA member. • Review other State Associations' pricing on sponsorships and exhibitor fees and compare to MICPA's pricing • Review the sponsor and exhibitor pricing of other Associations/Organizations in the State that MICPA could be in competition with and compare to MICPA pricing • Hold a testimonial campaign • Ensure every possible category is represented in MICPA+ sponsorship program **Metrics** • Master marketing plan is created and segmented by target audiences • Created profiles of CPAs to better sell and explain opportunities • Partners and sponsors are recognized via MICPA platforms • Calls to sponsors have been made and ways to improve their experience have been noted and implemented. • MICPA + section is added to website. • An introductory letter is sent to all MICPA members for new MICPA+sponsors. • A format is set up in Informz to send out follow-up e-mails to MICPA members based on the action the member tool. • Pricing from other State Associations as well as organizations in the state have been researched and	services, private jet services, golf courses, restaurants, etc.) **Metrics** • Calls to sponsors have been made and ways to improve their experience have been noted and implemented. • MICPA + sponsor partnership section has been added to MICPA website • Pricing from other State Associations as well as organizations in the state have been researched and compared to MICPA's pricing • Obtain 10 MICPA sponsor/advertiser testimonials and corresponding photos to be used in 2019 media kit • Update all MICPA+ partners that were legacy partners that were grandfathered into the MICPA+ program • Monitor sales pipeline progress in weekly Business Development meetings each and every Friday	services, private jet services, golf courses, restaurants, etc.) **Metrics** • Calls to sponsors have been made and ways to improve their experience have been noted and implemented. • MICPA + sponsor partnership section has been added to MICPA website • Pricing from other State Associations as well as organizations in the state have been researched and compared to MICPA's pricing • Obtain 10 MICPA sponsor/advertiser testimonials and corresponding photos to be used in 2020 media kit • Update all MICPA+ partners that were legacy partners that were grandfathered into the MICPA+ program • Monitor sales pipeline progress in weekly Business Development meetings each and every Friday

• compared to MICPA's pricing • Obtained testimonials and photos from sponsors and used them in advertisements and prospectus sheets • All defined categories are represented in MICPA+ sponsorship program		
Objective: Business development is responsible for ongoing strategic thinking to improve existing sponsor relationships, and to initiate new sponsor relationship options **High Level Actions** • Cross MICPA populations/staff between departments to identify new opportunities • Identify initiatives that impact all members regardless of location • Task forces are surveyed for possible sponsors and exhibitors to enhance a conference. • Multiyear contracts with sponsors become the norm. • Sponsors are sold for an enhanced app that includes specific event information • A new prospectus is developed **Tactics** • Identify vendors that MICPA staff work with in order to build sponsorship packages	**Objective: Business development is responsible for ongoing strategic thinking to improve existing sponsor relationships, and to initiate new sponsor relationship options** **High Level Actions** • Continue to monitor and update all MICPA+ partners • ALL proposals will have a multi-year option for the sponsor and advertiser to consider • A new prospectus event sheet for 2019 will be ready by Thursday, November 1, 2018 at the latest **Tactics** • Continue to call on ALL vendors that MICPA uses, so that Business Development will build relationships with them • Identify vendors of MICPA member firms to leverage opportunities for new MICPA sponsorships and	**Objective: Business development is responsible for ongoing strategic thinking to improve existing sponsor relationships, and to initiate new sponsor relationship options** **High Level Actions** • Continue to monitor and update all MICPA+ partners • ALL proposals will have a multi-year option for the sponsor and advertiser to consider • A new prospectus event sheet for 2020 will be ready by the first Monday in November of 2019 at the latest **Tactics** • Continue to call on ALL vendors that MICPA uses, so that Business Development will build relationships with them • Identify vendors of MICPA member firms to leverage opportunities for new MICPA sponsorships and

that market their services to target CPA member audiences • Identify vendors of MICPA members throughout the state to leverage opportunities for sponsorship, collaborated business opportunity and/or new partnerships • Develop the criteria for the submission of wish list items to be submitted by departments for potential sponsor or partner funding • Every proposal is for a multiyear contract • The sponsorship amount for an enhanced app is determined and possible sponsors are brainstormed with IT.	relationships with warm introductions from those member firms • Solicit other departments within the MICPA for their input for potential sponsors • The number of new sponsors that can be sold for an enhanced app (Connect), and ask for help from the MICPA IT staff	relationships with warm introductions from those member firms • Solicit other departments within the MICPA for their input for potential sponsors • The number of new sponsors that can be sold for an enhanced app (Connect), and ask for help from the MICPA IT staff
Metrics • Departments are cross selling or 50% of departments are contributing to enhanced sales • Revenue is being maximized • Criteria for wish list funding developed • Multiyear contracts are sold to sponsors • A sponsor is retained for the app enhancement	**Metrics** • New prospects will be identified, and sales pipeline progress monitored each week in Friday afternoon Business Development meeting to reach goal for 2019-2020	**Metrics** • New prospects will be identified, and sales pipeline progress monitored each week in Friday afternoon Business Development meeting to reach goal for 2020-2021

2018-2021 MICPA Strategic Plan

Initiative: Learning

To enhance member learning opportunities that embrace the changing landscape of adult learning and meet state licensure requirements

Risks considered: Resistance to change, offerings that appeal to all ages, various marketing styles based on age, customer preferences and changing demographics, technology and its effect on learning, new trends for staffing, utilizing technology, competitors, learning for audit and tax retooling, hyper-specialization

2018-2019	2019-2020	2020-2021
Objective: Future of Learning: Engage and interact with attendees to enhance learning **High Level Actions** • Continue to research new and evolving CPE trends, including the future of learning • Determine the skill set needed by CPAs of the future and address retooling and retraining education • Understand how technology will change and enhance the way various CPE offerings are provided or discussed through continuing dialogue post CPE offering • Determine skills needed to be client advisor and determine if a series of courses can be developed to assist members on this path. • Once nano learning is in Michigan rules, determine how to offer this option to Michigan CPAs. • Enhance the awareness and understanding of MICPA Business and Industry and CTS (In-firm) offerings. • Understand what skills members believe will enhance their career. (Coaching and mentoring, accounting information systems, business planning and strategy) • Organize CPE store by technical areas and stress competency rather than compliance	**Objective: Future of Learning: Engage and interact with attendees to enhance learning** **High Level Actions** • Continue to research and explore the use of new education trends • Experiment and incorporate appropriate new education trends into offerings • If CPE requirements change (rules and regulations), ensure they are incorporated in all training • Understand how technology will change and enhance the way various CPE offerings are provided or discussions are continued after completion of the CPE offering • Incorporate firms training requirements for the audit staff of the future and tax staff of the future in courses provided by the MICPA • If state societies are allowed to provide the training, research what type of learning is appropriate and when it should be offered to Non-CPA CGMAs • Understand what skills members believe will enhance their career. (Coaching and mentoring, accounting information systems, business planning and strategy) • Monitor usage of nano-learning and increase offerings if appropriate	**Objective: Future of Learning: Engage and interact with attendees to enhance learning** **High Level Actions** • Be on the forefront of cutting-edge developments in enhanced continued learning • Incorporate CPE trends and requirements into offerings as appropriate • If CPE requirements change (rules and regulations), ensure they are incorporated in all training • Incorporate firms training requirements for the audit staff of the future and tax staff of the future in courses provided by the MICPA • If state societies are allowed to provide the training, research what type of learning is appropriate and when it should be offered to Non-CPA CGMA's • Understand what skills members believe will enhance their career. (Coaching and mentoring, accounting information systems, business planning and strategy) • Monitor usage of nano-learning and increase offering if appropriate

Tactics

- Continue to follow information from the AICPA and NASBA on the future of learning
- Staff to continue to attend educational conferences that provide information on the future of learning, current CPE trends and techniques used by other state societies
- Continue to research instructors and vendors that can provide new interactive learning.
- Talk to various states on new methodologies for presenting CPE courses they are using to enhance course delivery and attendance (Ohio, Washington, Virginia)
- Determine if the new skills that members would like to enhance can be turned into a certificate program that would add value to MICPA membership
- Research what training is required by firms for audit and tax staff of the future
- Research firms' training requirements for the audit and tax staff of the future and find or develop courses that meet the firms needs
- Research how technology is being used in learning and how it might enhance MICPA courses.
- Determine if a CFO-like series for advisory services and leadership can be created
- Determine what courses can be offered in nano size offerings. Review offerings from education vendors
- Determine if it is feasible to create and then offer MICPA nano learning courses
- Determine and implement new marketing methods and how to best use them to engage attendees (Informz)
- Create a marketing strategy to enhance awareness of MICPA

Tactics

- Continue to follow information from the AICPA and NASBA on the future of learning
- Staff to continue to attend educational conferences that provide information on the future of learning, current CPE trends and techniques used by other state societies
- Create series of courses for advisory services and leadership if research from year one shows it feasible
- Incorporate new instructors and vendors into CPE offering schedule who provide interactive learning
- Select instructors that have been trained and now utilize new tools and techniques
- Find or develop courses that teach the skill set needed by CPAs in audit and tax staff of the future
- Continue to monitor, adjust, and report on changes to CPE rules and regulations
- Evaluate and adjust the marketing strategy for the Business & Industry audience providing increased customization
- Take CPE attendees beyond the course by encouraging them to engage in conversation post-event via Connect
- Taking the lead from year one, expanding and promoting nano offerings to determine uptake

Metrics

- All communications include up-to-date education requirements based on continued monitoring of rules and regulations
- Offered courses that meet training needs for the audit and tax staff of the future into the MICPA offerings
- Created marketing strategy for the Business & Industry audience including increased customization
- Increased number of nano-learning offerings by third party vendors

Tactics

- Continue to follow information from the AICPA and NASBA on the future of learning
- Staff to continue to attend educational conferences that provide information on the future of learning, current CPE trends and techniques used by other state societies
- Incorporate new instructors and vendors into CPE offering schedule who provide interactive learning
- Incorporate new instructors and vendors into CPE offering schedule who provide interactive learning
- Select instructors that have been trained and now utilize new tools and techniques
- Evaluate effectiveness of new techniques in the eyes of the instructors and solicit feedback on enhancements
- Continue to monitor, adjust, and report on changes to CPE rules and regulations
- Continue to follow information from the AICPA and NASBA on the future of learning
- Find or develop courses that teach the skill set needed by CPAs in audit and tax staff of the future
- Evaluate and adjust the marketing strategy to for the Business & Industry audience providing increased customization
- Continue to encourage CPE attendees to engage post-event via Connect and refine communication method

business and industry courses and CTS (in-firm) offerings • Look at AICPA website on marketing and determine if the store can be arranged in such a way as to make it easier to identify all courses within a specific learning area **Metrics** • MICPA Staff attended, documented, and shared information gained from Interchange (2), State Society CPE Conference (3), MSAE OrgPro (2), AICPA Channel Partner Meeting (1) • Conference and Seminar Attendance is on target as of October to meet budget. Webinars are behind due to slower uptake on Michigan Specific Ethics and the increase in the budget for Tax Reform • Self-study is used in nano-bites by MICPA members (only offered in 1-hour segments until the rules allow for this on 7/1/2019). Working with vendors to track available nano courses when they can be offered in year two • Talked to various states and understand new methodologies they are using in learning programs. Implemented the appropriate ideas into MICPA offerings and worked with task forces to implement. This has led to an increase in simulcasting. • Researched firm training requirements for the audit and tax staff of the future that will begin to be included in years two and three • Investigated the feasibility of a certificate program for needed or enhanced skills. Using CTS as a model, a certification program has been implemented for review in 2019 • Determined that a CFO like series for advisory services or		**Metrics** • All communications include up to date education requirements based on continued monitoring of rules and regulations • Incorporated and offered courses that meet training needs for the audit and tax staff of the future into the MICPA offerings • Enhanced marketing strategy promoting learning for the Business & Industry audience including increased customization • Evaluated and enhanced marketing plan for course attendees encouraging the use of Connect to continue the conversation post-event

leadership is not feasible at this time due to competition		
Objective: Enhance the value of MICPA Learning/CPE to our attendees **High Level Actions** • Create programs that provide value that members do not find at other local competitor education programs • Emphasize development of new programs and processes to appeal to attendees • Emphasize consolidated communications for CPE offerings to appeal to attendees • Research a technology strategy for learning • Communicate the existence of the new state specific ethics requirement • Create the one course that will meet the required state specific ethics each reporting period • Create a plan to provide high level learning events (pop-ups), working with membership and business development. • Research and begin development of a leadership program for young professionals **Tactics** • Work with the Ethics Curriculum group to create a state specific ethics course • Train the ethics presenters to provide the course • Determine if other outside groups can present the program and what it will cost to use our materials • Market existence of the new state specific ethics requirement	**Objective: Enhance the value of MICPA Learning/CPE to our attendees** **High Level Actions** • Review new programs and processes to measure value • Research ways to continue to improve communication and marketing of MICPA education programs • Continue to explore the changing world of technology and how it may help make the education marketing processes effective • Establish a technology strategy for learning • Keep the State Specific Ethics program current and begin development of the second course for the 2019-2021 CPE reporting year • Create a plan to provide high level learning events (pop-ups), working with membership and business development • Begin development of a leadership program for young professionals **Tactics** • Evaluate new programs and processes to determine if we continue to hold programs • Develop a strategy for implementing new communication and marketing methods along with a goal-based evaluation process of the enhanced approach • Conduct research and use data to better understand our members and attendees and how to reach them more effectively • Create and begin implementation of a technology strategy for learning • Update the State Specific Ethics program if needed and begin development of the second course for the 2019-2021 CPE reporting year	**Objective: Enhance the value of MICPA Learning/CPE to our attendees** **High Level Actions** • Review new and ongoing programs, processes to measure if they continue to have value • Research ways to continue to improve communication and marketing of MICPA education programs • Keep technology strategy for learning current • Keep the State Specific Ethics program current and develop new programs as needed • Evaluate and modify plan for high level learning events (pop-ups), working with membership and business development • Evaluate and modify plan for leadership program for young professionals as needed **Tactics** • Evaluate new programs and processes to determine if we continue to hold programs • Measure goals based on year two experience for effectiveness of the enhanced CPE marketing approach • Evaluate the technology strategy for learning and modify as needed • Update the State Specific Ethics program if needed and start development for the following year • Evaluate the plan and modify if needed to provide high level learning events (pop-ups), working with membership and business development

- Offer state specific ethics to CPAs statewide at a member and non-member price
- Create state specific ethics webinar and on-demand self-study versions
- Determine when and to whom the state specific in-person, webinar and on-demand self-study ethics course will be offered free of charge
- Enhance sponsorships to enable higher level speakers to be featured in designated conferences
- Establish a task force to create a leadership program for young members

Metrics
- The new state specific ethics requirement has been communicated to all Michigan CPAs. Postcards and communications were created and sent to all Michigan licensed CPAs
- A state specific ethics in-person course has been created. In addition, a webinar and on-demand self-study version has been created
- A state specific ethics course has been marketed to all Michigan CPAs
- A higher level of speakers were included in certain conferences which increased attendance and increased sponsorship opportunities
- New high-level learning events (pop-ups) have been held. During the budgeting process it was determined these programs are not going to be done
- Established and met with a task force to create a leadership program for young members

- Evaluate the plan and modify, if needed, to provide high level learning events (pop-ups), working with membership and business development
- Implement the new Leadership program for young members
- Market the new Leadership program for young members

Metrics
- Created an enhanced CPE marketing approach with measurement tools
- Created a technology strategy for learning
- Measured effectiveness of high-level learning events (pop-ups)
- A new leadership program has been created
- A new leadership program marketing plan has been developed
- Created one corresponding nano-course for each Leadership Development core competency.
- Created a public speaking course to market to B&I members

- If successful, continue the Leadership program for young members

Metrics
- Evaluated new programs and processes to determine if we continue to hold programs
- Measured goals based on year two experience for effectiveness of the enhanced CPE marketing approach
- Evaluated the technology strategy for learning and modified as needed
- Updated the State Specific Ethics program if needed and started development for the following year
- Evaluated the plan and modified as needed to provide high level learning events (pop-ups), working with membership and business development
- Evaluated the Leadership program for young members

Objective: Expand the use of the MICPA Tracker to provide a competitive advantage for the Association	Objective: Expand the use of the MICPA Tracker to provide a competitive advantage for the Association	Objective: Expand the use of the MICPA Tracker to provide a competitive advantage for the Association
High Level Actions • Continue to provide the use of the MICPA Tracker to all Michigan CPA's with the assistance of LARA • Refine the tools and information that the tracker provides. Use to expand and enhance offerings and participation • Continue to review data of courses taken by Tracker users • Use information that the tracker provides to expand and refine MICPA offerings • Expand CPE Tracker's abilities to account for the new state specific ethics required class and the new nano-bites option of earning CPE • IT team to create a strategy to train CPA firms in the use of the CPE Tracker **Tactics** • Leverage the benefit of the MICPA Tracker for ease of use and ease of reporting CPE hours to the State of Michigan • Refine groupings through sorting of data by relevant fields, including course date, vendor, course title, and field of study • Continue to review course information taken by CPA's on the MICPA Tracker to provide new topics or enhance our offerings to meet the attendee's needs and gain competitive advantage • Modify the CPE tracker to account for the new required state specific ethics course and nano-bites option of earning CPE • Measure new programs and vendors engaged as a result of third-party tracker analysis • Analyze member and nonmember tracker usage to	**High Level Actions** • Continue to provide the use of the MICPA Tracker to all Michigan CPA's with the assistance of LARA • Continue to refine tools for members, to make the process of tracking CPE easier • Continue to review data of courses taken by Tracker users • Use information that the tracker provides to expand and refine MICPA offerings • Expand CPE Tracker's abilities to account for the new state-specific ethics required class and the new nano-bites option of earning CPE **Tactics** • Compare the current years information to benchmarked third party tracker entries • Continue to review course information taken by CPAs on the MICPA Tracker to provide new topics or enhance our offerings to meet the attendee's needs and gain competitive advantage • Modify the CPE tracker to account for the new required state-specific ethics course and nano-bites option of earning CPE, adjust as needed • Measure new programs and vendors engaged as a result of third-party tracker analysis • Analyze member and nonmember tracker usage and refine communication efforts based on data • IT team to create customized training to CPA firms in use of submitting CPE information to the CPE tracker as needed • IT team members travel to CPA firms to train their staff in how to upload CPE information to the CPE tracker as needed	**High Level Actions** • Continue to provide the use of the MICPA Tracker to all Michigan CPA's with the assistance of LARA • Continue to refine tools for members, to make the process of tracking CPE easier • Continue to review data of courses taken by CPE Tracker users • Use information that the CPE Tracker provides to expand and refine MICPA offerings **Tactics** • Continue to compare current years information based on benchmarked data from third party tracker entries • Continue to review course information taken by CPA's on the MICPA Tracker to provide new topics or enhance our offerings to meet the attendee's needs and gain competitive advantage • Modify the CPE tracker to account for the new required state specific ethics course and nano-bites option of earning CPE, adjust as needed • Measure new programs and vendors engaged as a result of third-party tracker analysis • Analyze member and nonmember tracker usage and refine communication efforts based on data • IT team to create customized training to CPA firms in use of submitting CPE information to the CPE tracker as needed • IT team members travel to CPA firms to train their staff in how to upload CPE information to the CPE tracker as needed

measure success of communication efforts
- IT team to customize training to CPA firms in use of submitting CPE information to the CPE tracker
- IT team members travel to CPA firms to train their staff in how to upload CPE information to the CPE tracker
- Analyze additional requirements for other credentials (i.e. ABV, CFP, etc.) and CPE needs (i.e. Yellow Book). Continued to provide courses that qualify for all credentials
- Explore the potential for tracking additional credentials and requirements

Metrics
- Continued to review the CPE Tracker report to benchmark member and nonmember CPE Tracker data on a monthly basis
- Utilized third party tracker information to identify potential new courses and vendors
- Modified CPE Tracker to accommodate the new state specific ethics requirement and nano-bites CPE option will be reviewed in year two
- IT team provided customized training to CPA firms in use of submitting CPE information to the CPE tracker
- IT team members worked with CPA firms to train their staff in how to upload CPE information to the CPE tracker. Team will travel to firms in year 2
- Researched additional requirements for other credentials (i.e. ABV, CFP, etc.) and CPE needs (i.e. Yellow Book). Continued to provide courses that qualify for all credentials

- Analyze additional requirements for other credentials (i.e. ABV, CFP, etc.) and CPE needs (i.e. Yellow Book). Continued to provide courses that qualify for all credentials
- Explore the potential for tracking additional credentials and requirements

Metrics
- Continued to review the CPE Tracker report to benchmark member and nonmember CPE Tracker data
- Utilized third party tracker information to identify potential new courses and vendors
- Modified the CPE Tracker to account for the new required state specific ethics course and nano-bites option of earning CPE, adjust as needed
- IT team provided training to CPA firms in use of submitting CPE information to the CPE tracker as needed
- IT team members traveled to CPA firms to train their staff in how to upload CPE information to the CPE tracker as needed
- Analyzed additional requirements for other credentials (i.e. ABV, CFP, etc.) and CPE needs (i.e. Yellow Book). Continued to provide courses that qualify for all credentials

- Analyze additional requirements for other credentials (i.e. ABV, CFP, etc.) and CPE needs (i.e. Yellow Book). Continued to provide courses that qualify for all credentials
- Explore the potential for tracking additional credentials and requirements

Metrics
- Continued to review the CPE Tracker report to benchmark member and nonmember CPE Tracker data
- Utilized third party tracker information to identify potential new courses and vendors
- Modified the CPE Tracker to account for the new required state specific ethics course and nano-bites option of earning CPE, adjust as needed
- Analyzed additional requirements for other credentials (i.e. ABV, CFP, etc.) and CPE needs (i.e. Yellow Book). Continued to provide courses that qualify for all credentials

2018-2021 MICPA Strategic Plan

Initiative: Membership

To provide and convey value to diverse member groups, while exploring and implementing opportunities to recruit and retain members and to support succession of the profession in Michigan

Risks considered: changing demographics, maintaining relevancy for all members, smaller pipeline of CPAs, non-CPA CGMA, understanding value for every level of member, continued increase in members moving to industry, new assurance team includes various non-CPAs, stereo type of MICPA organization as a compliance-based education organization, complexity of peer review

2018-2019	2019-2020	2020-2021
Objective: Effectively understand and convey the value of membership in each membership category **High Level Actions** - Research potential advantages of simplifying membership pricing and options - Meet with member firms and companies to understand what brings them value and how to best communicate with them - Identify opportunities to enhance value to members outside of public accounting - Design volunteer recruitment campaign for companies and firms and their CPA staff to explain the benefits of having staff volunteer at MICPA to enhance their growth and leadership development - Create support of various credentials being offered to CPAs in the profession in conjunction with Learning.	**Objective: Effectively understand and convey the value of membership in each membership category** **High Level Actions** - Adjust membership categories based on results of research - Continue to meet with firms and companies to share new opportunities - Implement new opportunities for members outside of public accounting - Promote volunteer recruitment campaign for companies and firms and their CPA staff to explain the benefits of having staff volunteer at MICPA to enhance their growth and leadership development - Encourage Top 20 firms to nominate staff members to serve on task forces and committees - Review new task force management processes to ensure updated task force focus **Tactics** - Identify potential "competitors" with which	**Objective: Effectively understand and convey the value of membership in each membership category** **High Level Actions** - Evaluate changes to membership categories - Evaluate effectiveness of new opportunities for members outside of public accounting - Support various credentials/certifications being offered to CPAs in the profession in conjunction with Learning.

Tactics

- Streamline process for obtaining and maintaining member contact information
- Determine new marketing methods and how best to use them to engage the population (Informz)
- Create opportunities for members to connect with peers through Connect
- Enhance the management of task forces to ensure updated task force focus and mission that is reviewed at least annually to keep task force members engaged
- Identify and understand membership efforts of the AICPA and other state societies
- Explore opportunities to "customize" membership – CPE bundles, "enhanced" membership, etc.
- Identify opportunities to engage new members, young professionals

Metrics

- Fewer email bounce backs, fewer returned mail pieces due to improved contact information
- Stabilized number of members in the Fellow – Not Licensed membership category
- Actively engaged retired members
- Increased engagement of all members using technology
- Customized membership experience

we may develop relationships to benefit current and potential members

- Review effectiveness of marketing methods and refine usage based on analytics (Informz)
- Actively promote and engage members in dialogue on Connect through a wide array of topics and uses
- Develop process for distributing videos for use at firms and companies on MICPA services and opportunities for involvement and staff enhancement
- Build "customized" membership – CPE bundles, "enhanced" membership, etc. to attract new members and provide better value – certification, badging, sections
- Launch volunteer initiatives to engage new members, young professionals immediately

Metrics

- Simplified process for members to provide and update contact information, improving experience
- Stabilized number of members in the Fellow – Not Licensed membership category
- Actively engaged retired members
- Actively engaged new members, growth in the Fellow < 5 category

Tactics

- Continue to utilize technology to streamline process for obtaining and maintaining member contact information
- Grow number of online communities and discussion groups on Connect
- Identify new ways to utilize Connect to engage with members – job postings, volunteer opportunities, mentoring, etc.
- Refine "customized" membership – CPE bundles, "enhanced" membership, etc. to attract new members and provide better value, sections

Metrics

- Increased member engagement on Connect
- Stabilized number of members in the Fellow – Not Licensed membership category
- Improved conversion rate from Fellow >5 to Retired. Decrease in terminated retired members.
- Actively engaged new members, growth in the Fellow < 5 category

	• Improved retention through membership customization	
Objective: Strengthen and enhance the future of the CPA profession **High Level Actions** • Conduct research and forecasting to understand the risks faced by the profession in 5, 10 and 15 years, regarding talent and workforce development • Leverage our partnership with MAF and other key organizations (ALPFA, NABA, FEI, RMA, etc.) to raise awareness of the CPA profession among students and graduates • Enhance relationships with universities to ensure continued awareness of the value of the CPA credential and careers in accounting • Include a focus on diversity and inclusion in outreach efforts • Review current practices for appeal to young professionals **Tactics** • Create new relationships with changing department chairs and other key faculty on campuses	**Objective: Strengthen and enhance the future of the CPA profession** **High Level Actions** • Identify additional ways in which the MICPA can be a resource to help solve the problem of talent gap in the profession • Leverage our partnership with MAF and other key organizations (ALPFA, NABA, FEI, RMA, etc.) to raise awareness of the CPA profession among students and graduates • Expand relationships with universities to ensure continued awareness of the value of the CPA credential and careers in accounting • Add additional High School Leaders program. Seek sponsorship from regional or mid-sized firms to underwrite expense. • Continue focus on diversity and inclusion • Update current practices for appeal to young professional **Tactics** • Provide resources for college advisors and career services departments to	**Objective: Strengthen and enhance the future of the CPA profession** **High Level Actions** • Create long-term action plan for serving as a resource to provide solutions to the talent gap problem • Stay on-top of current trends within the profession that will affect current and future members **Tactics** • Utilize national and state data, as well as MICPA membership data, to continue to monitor and forecast employment trends in the profession

• Seek opportunities for student and emerging leader interaction • Monitor the activities of the National Commission on Diversity and Inclusion • Include student outreach offerings to enhance their interpersonal and soft skills • Work with educators to determine best approach to collaborate with affiliated departments outside of accounting • Identify additional volunteer opportunities to engage new and young members immediately • Create a video to share with firms and students to explain what the audit staff of the future looks like and what skills they need **Metrics** • Created new relationships with key faculty members at colleges and universities • Provided increased opportunities for student and member interaction • Responded to new ideas presented by the National Commission on Diversity and Inclusion • Expanded college visit presentations to include non-accounting majors • Created 'A Great Day' video series highlighting the benefits of the profession as well as different segments of membership.	help promote accounting degrees, i.e. 'A Great Day' video series. • Implement additional opportunities for student and emerging leader interaction • Monitor the activities of the National Commission on Diversity and Inclusion • Include student outreach offerings to enhance their interpersonal and soft skills • Based on educators' feedback, implement plan to collaborate with affiliated departments outside accounting • Implement additional volunteer opportunities to engage new and young members immediately **Metrics** • Created relationships with advisors, career services directors, expanding our reach on college campuses • Measurable increased engagement from students, new members, emerging leaders • Responded to new ideas presented by the National Commission on Diversity and Inclusion • Expanded college visit presentations to include non-accounting majors • Increased participation from Fellows < 5 in association activities • Distributed all 5 videos from 'A Great Day' series to college educators and career services departments.	**Metrics** • Measurable increased engagement from students, new members, emerging leaders • Long-term plan developed to address new initiatives to fill the pipeline • Continue to mine 'A Great Day' series opportunities to promote the profession

Objective: Keep Peer Review relevant and a part of the MICPA	Objective: Keep Peer Review relevant and a part of the MICPA	Objective: Keep Peer Review relevant and a part of the MICPA
High Level Actions • Monitor AICPA changes in Peer Review keeping MICPA aware and a part of the process • Position Michigan as an important Peer Review state by mitigating familiarity threat among firms, technical reviewers peer reviewers and firms subject to peer review as well as meeting benchmarks and staffing levels identified in the August 31, 2017 AICPA plan • Maintain and communicate relevant Peer Review resources for MICPA members and reviewers • Maintain a strong relationship with the State Board of Accountancy • Determine the value firms having peer review find in MICPA AE services **Tactics** • Maintain a flexible peer review team that will include a CPA who oversees the program • Create communications to include posting of information and push of information through MICPA avenues • Mitigate any familiarity threat that exists among RABs, technical reviewers and peer reviewers by adopting a policy of redacting identifying information about firm and/ or peer reviewers from documents presented to the RABs	**High Level Actions** • Monitor AICPA changes in Peer Review keeping MICPA aware and a part of the process • Keep Michigan positioned as an important Peer Review state by continuing to mitigate any familiarity threat among firms, technical reviewers peer reviewers and firms subject to peer review as well as continue to meet benchmarks and staffing levels identified in the August 31, 2017 AICPA plan • Maintain and communicate relevant Peer Review resources for MICPA members and reviewers (via website, etc.) • Maintain a strong relationship with the State Board of Accountancy • Enhance the number of RAB members **Tactics** • Maintain a flexible peer review team that will include a CPA who oversees the program • Create communications to include posting and push of information through MICPA avenues including the website (updated bi-monthly and as needed) • Mitigate any familiarity threat that exists among RABs, technical reviewers and peer reviewers by following the policy of redacting identifying information about firm and/ or peer reviewers from	**High Level Actions** • Monitor AICPA changes in Peer Review keeping MICPA aware and a part of the process • Keep Michigan positioned as an important Peer Review state by continuing to mitigate any familiarity threat among firms, technical reviewers peer reviewers and firms subject to peer review as well as continue to meet benchmarks and staffing levels identified in the August 31, 2017 AICPA plan • Maintain and communicate relevant Peer Review resources for MICPA members and reviewers (via website, etc.) • Maintain a strong relationship with the State Board of Accountancy • Continue to enhance the number of RAB members **Tactics** • Maintain a flexible peer review team that will include a CPA who oversees the program • Create communications to include posting of information and push of information through MICPA avenues including the website (updated bi-monthly and as needed) • Mitigate any familiarity threat that exists among RABs, technical reviewers and peer reviewers by following the policy of redacting identifying information about firm and/

• Policies and procedures will be adopted to ensure compliance with benchmarks set in three categories: administrator, technical reviewer and RABs • Work with governmental relations staff to maintain a strong relationship with State Board of Accountancy • Survey all peer review firms billed an administrative fee by MICPA to ensure services provided by AICPA and MICPA are differentiated and are effective **Metrics** • Evaluated effectiveness of communications to members. • Adopted policies and procedures for familiarity threat and benchmarks • Have successfully completed oversights as prescribed by the AICPA • Strong relationship maintained with State Board of Accountancy. • Surveyed all peer review firms billed an administrative fee by MICPA.	documents presented to the RABs • Follow all policies and procedures adopted to ensure compliance with benchmarks set in three categories: administrator, technical reviewer and RABs • Work with governmental relations staff to maintain a strong relationship with State Board of Accountancy • Work with AICPA to obtain promotional materials to use at audit and accounting conferences to alert CPAs involved in peer review of the opportunity to serve on the RAB • Develop MICPA promotional materials to encourage members to serve on the RAB **Metrics** • Evaluated effectiveness of communications to members through an electronic survey • Peer review committee approved policies and procedures for familiarity threat and benchmarks • Have successfully completed 2 oversights • Strong relationship maintained with State Board of Accountancy • Additional members have joined the RAB	or peer reviewers from documents presented to the RABs • Follow all policies and procedures adopted to ensure compliance with benchmarks set in three categories: administrator, technical reviewer and RABs • Work with governmental relations staff to maintain a strong relationship with State Board of Accountancy • Work with AICPA to obtain promotional materials to use at audit and accounting conferences to alert CPAs involved in peer review of the opportunity to serve on the RAB • Develop MICPA promotional materials to encourage members to serve on the RAB **Metrics** • Evaluated effectiveness of communications to members • Peer review committee approved policies and procedures for familiarity threat and benchmarks • Have successfully completed oversights • Strong relationship maintained with State Board of Accountancy • RAB size has increased
Objective: Enhance the functionality and maintenance of the CPE Tracker to ensure it remains a benefit for members **High Level Actions** • Use the CPE Tracker as a key member benefit in that routinely update members with their CPE hours earned	**Objective: Share the benefit of the CPE Tracker with all Michigan CPAs** **High Level Actions** • Communicate CPE Tracker enhancements to Michigan CPAs	**Objective: Share the benefit of the CPE Tracker with all Michigan CPAs** **High Level Actions** • Michigan CPAs are able to use the CPE Tracker as part of the process to renew their Michigan CPA License

monthly, helping them keep track for compliance • Work with the Michigan Department of Licensing and Regulatory Affairs to inform Michigan CPAs of enhanced CPE Tracker • Grow membership based on CPE Tracker user information in conjunction with IT **Tactics** • Enhance the functionality of the Tracker to reflect changes such as nano learning and Michigan specific ethics • Gather feedback from members on their experience using the tracker • Review Tracker information quarterly to glean potential member leads and membership opportunities • Identify and share important CPE Tracker reminders and information with MICPA members **Metrics** • Allowed members to provide tracker feedback • New members were obtained through tracker information • Tracked number of members using Tracker to report CPE and renew their licenses	• Grow membership utilizing CPE tracker information **Tactics** • Give MICPA Firm Administrator Members reporting tools to view firm staff CPE progress • Explore opportunities to grow membership based on nonmember CPE tracker users **Metrics** • Firm administrators have increased access to tools to enter and monitor their staff CPE hours • Developed a strategy to effectively market membership to nonmember CPE Tracker users	• Added CPE Tracker enhancements lessen the burden of audits for Michigan CPAs • Grow membership based on CPE Tracker user information **Tactics** • Michigan CPAs are able to use the enhanced CPE Tracker as part of the process to renew their Michigan CPA License • Communicate enhancements to the CPE tracker to all users • Continued to explore opportunities to grow membership based on nonmember CPE tracker users **Metrics** • Increased the usage of the CPE Tracker over the previous reporting period • Developed a strategy to effectively market membership to nonmember CPE Tracker user • Implemented a communications plan to educate CPE Tracker users on enhancements • Utilized the strategy to market membership to nonmember CPE Tracker users

2018-2021 Strategic Plan

Initiative: Non-CPA Membership-how to expand the relevant market
To provide and convey value to diverse non-CPA member groups

Risks considered: smaller pipeline of CPAs, non-CPA CGMA, new assurance team includes various non-CPAs, speed of technology change, change in skills for future

2018-2019	2019-2020	2020-2021
Objective: Analyze current membership categories to effectively understand into which category non-CPA members would fit and how the value of membership would best be conveyed **High Level Actions** • Capture ideas and actions to prepare MICPA to respond to and include non-CPAs based on research evolution of the profession • Seek out unique membership opportunities that will support the mission of the MICPA and benefit all members • Meet with member firms and companies to understand what brings them and OQPs value and how to best communicate with them • Identify opportunities to enhance value to OQPs outside of public accounting • Research which certificates would be of value for members and OQPs. • Review task forces for potential non-CPA membership and participation.	**Objective: Analyze current membership categories to effectively understand into which category non-CPA members would fit and how the value of membership would best be conveyed** **High Level Actions** • Adjust membership categories if needed, based on results of research • Continue to meet with firms and companies to share new opportunities • Implement new opportunities for members outside of public accounting • Promote volunteer recruitment campaign for companies and firms and their non-CPA staff to explain the benefits of having staff volunteer at MICPA to enhance their growth and leadership development • Create "value proposition" for task force involvement • Support various certifications being offered to non-CPAs in the profession in conjunction with Learning. **Tactics** • Identify potential "competitors" with which	**Objective: Analyze current membership categories to effectively understand into which category non-CPA members would fit and how the value of membership would best be conveyed** **High Level Actions** • Evaluate changes to membership categories • Evaluate effectiveness of new opportunities for members outside of public accounting • Support various credentials being offered to non-CPAs in the profession in conjunction with Learning • Determine relevant task forces for non-CPAs, recruit non-CPA members to participate **Tactics** • Analyze ROI of new categories • Review effectiveness of marketing methods • Evaluate engagement on Connect **Metrics** • Growth in non-CPA category on-par with CPA categories • Continued increased engagement of all members using technology

Tactics • Leverage relationships with other organizations to gain access to all potential non-CPA members • Determine new marketing methods and how best to use them to engage the population (Informz) • Create opportunities for all members to connect with peers through Connect • Create videos to be shown at firms and companies on the way the profession is changing • Identify and understand membership OQP efforts of the AICPA and other state societies • Explore opportunities to "customize" membership– CPE bundles, "enhanced" membership, etc. • Identify opportunities to engage new members, young professionals • Explore attorneys as members and clarify non-CPAs in industry • Explore attorneys as members and clarify non-CPAs in industry • Focus on no more than two categories of OQP **Metrics** • Developed plan to reach non-CPA members • Created customized membership experience for all members, including OQP • Developed non-CPA value proposition	we may develop relationships to benefit current and potential members • Review effectiveness of marketing methods and refine their usage through data analysis (Informz) • Implement new credential programs offered by MICPA, using AICPA's offerings as a guide • Actively promote and engage members in dialogue on Connect through a wide array of topics and uses **Metrics** • Increased number of members in Non-CPA Affiliate category • Continued increased engagement of all members using technology • Value Proposition measured for non-CPA members	• Non-CPA members participating in all relevant task forces