



**MassCPAs**<sup>TM</sup>  
Massachusetts Society of CPAs

# Strategic Plan 2022–2025

**Our vision:**

**To protect, enhance and promote the value  
of being a CPA in Massachusetts.**

# What we know drives our strategic objectives

What we know	Our strategic objective
<ul style="list-style-type: none"><li>◆ Only 5% of members say they feel “very connected”</li><li>◆ Our Net Promotor Score (NPS = supporters - detractors) is above average, but we could do better</li><li>◆ NPS and connectedness reflect perceived member value and predict retention</li></ul>	Increase satisfaction and connectedness among our members
<p>The profession is changing and changing fast</p> <ul style="list-style-type: none"><li>◆ Firms are pivoting to advisory service</li><li>◆ Technology is changing everything</li><li>◆ Skills and capabilities required for success are changing</li></ul>	Stay relevant in a time of change in the profession
<p>The Society is strong but faces risks</p> <ul style="list-style-type: none"><li>◆ We are very reliant on dues</li><li>◆ Hiring at large firms is skewing away from CPAs</li><li>◆ We have a great staff – each person matters</li></ul>	Keep the Society strong and stable

## Goal 1:

**Be the professional home of choice for Massachusetts CPAs and accounting professionals working in their firms, companies and organizations.** (Strategic KPI: retention rate, retention rate at “inflection points”, engagement score, penetration rate)

- ◆ We provide solutions for our members at all phases of their careers – high school through retirement – at firms and companies of all sizes
- ◆ We will build brand awareness and provide value to students and focus on their conversion to full membership
- ◆ We advocate for our members and for the profession
- ◆ We create opportunities for personal development and connections

## Goal 2:

**Increase the reach of our products and services.** (Strategic KPI: non-dues revenue, engagement score)

- ◆ We will develop and leverage an expanded volunteer and champion network including the Big 4
- ◆ We will provide (or expand) in-house training offerings aimed at helping firms and companies succeed in a changing environment
- ◆ We will develop curated and personalized education for firms, companies and individuals
- ◆ We will develop trainings for non-members and for non-CPAs

### Goal 3:

**Elevate the CPA brand by positioning CPAs as trusted experts, showcasing the Society as the voice of reason and increasing awareness among students of the profession as a desirable career path. (Strategic KPI: media mentions, student memberships)**

- ◆ We will increase our reach in colleges, universities, high schools and middle schools
- ◆ We will increase awareness of the CPA profession as a career path among minority communities
- ◆ We will attract earned media around thought leadership ideas and events
- ◆ We will position CPAs as the trusted business advisors to potential clients and highlight their expertise within the business community and legislature

### Goal 4:

**Lead the advancement of DEI within the CPA profession. (Strategic KPI: growth in underrepresented groups in the profession in MA, growth in underrepresented groups in MassCPAs leadership)**

- ◆ We will provide firms and companies the support and education necessary to create inclusive workplaces
- ◆ We will provide individuals with support through personalized peer-to-peer learning and networking as well as mentorship and sponsorship opportunities
- ◆ We will provide continued thought leadership on DEI within the CPA profession through omni-channel distribution
- ◆ We will continue to promote DEI internally and in volunteer leadership

### Goal 5:

**Ensure our operational excellence and long-term financial health. (Strategic KPI: staff turnover during and after transition)**

- ◆ Transition to a new CEO in December 2023 while maintaining culture, key staff and organizational excellence
- ◆ We will evaluate and implement direction for the future of peer review
- ◆ We will maintain and grow our membership by continuing to provide value to firms as their needs and staffing mix evolve
- ◆ We will expand our offerings to members who are non-CPAs at CPA firms to help them succeed as firms adapt in a changing environment



## **Our values:**

### **Members are our top priority.**

Enhancing member value drives everything we do. We provide exceptional customer service, develop programs to address member needs and engage in positive and professional interactions with members.

### **We work together, succeed together.**

We are one team. Collaboration, respect, knowledge sharing and teamwork — with staff, members and other partners — are key to our success.

### **We are committed to diversity, equity and inclusion.**

The Society values diversity, equity and inclusion for all. From our staff to our members, volunteers and stakeholders, we recognize that our differences make us stronger.

### **We evolve and adapt.**

We understand that we can always get better, so we strive to continuously learn, improve and innovate, and we look for ways to help the Society grow.

### **We care about our culture.**

We support and encourage the personal development and professional growth of our staff — and we try to add some fun along the way.

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