



MassCPAsTM
Massachusetts Society of CPAs

Strategic Plan 2021–2025

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

Goal 1:

Be the professional home of choice for Massachusetts CPAs and 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 – all of our members – at all phases of their careers, high school through retirement, and 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 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 desired career path. (Strategic KPI: media mentions, student memberships)

- ◆ We will increase our reach in colleges and 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 2023
- ◆ This transition will be achieved while maintaining culture, key staff and organizational excellence
- ◆ Evaluate and implement direction for 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.

Let's get social!



hub.masscpas.org



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