

Learning and Development Collaboration Group Call

Wednesday, April 24, 2024



Agenda

- Welcome and Introductions
 - Please display your name and firm name on Zoom
- LEA Updates
 - Facilitator:
 - Carla Blattenbauer, LEA
- Takeaways from AICPA LEAD Symposium
 - Facilitators:
 - Steering Committee Member: Courtney Seeber, Anders CPAs + Advisors
 - Member Firms: Lisa Iwata, Clark Nuber
- Using Lcvista and 3rd party content providers
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 - Steering Committee Member: Courtney Seeber, Anders CPAs + Advisors
 - Member Firms: Melissa Olvera, Marcum
- Open Discussion



LEA Update - Programs

- Principles of Business Advisory Success - Webinar
 - 27 registrations
 - Mindshop Webinar 1 of 3: May 14, 2024
 - Community Discussion 1 of 3: May 16, 2024
- Emerging Leaders Program
 - 15+ registrations anticipated
 - 5/15/24 – Virtual Orientation 1-Hour
 - June 20-21, 2024 – Session 1 of 3 hosted by Richey May & Co., Denver, CO
- North American Regional Conference, Dallas, TX
 - June 9-12, 2024
 - To register go to the Member Portal, Events tab, scroll down to June Conference listed in date order
- Tax Levels Training Program
 - Save the Date – December 3-5, 2024, Denver, CO
 - Last year had 150 registrants for just the levels training (does not include the instructors, LEA staff, Tax Leaders Fly-In, etc.)



AICPA LEAD Take-aways: Using AI in Learning

- Several uses for Generative AI in L&D
 - Learning Objectives
 - Synthesize feedback
 - Create test banks
 - Images – Adobe, Canva
 - Text to Speech – Speechify
 - Upload PowerPoint content or script to create audio narration – Synthesia
 - Add gamification – LearnBrite
- Some firms utilizing VR
 - Accenture – Microsoft Mesh
 - BPM – Arthur, for new employee onboarding
- WISER framework to get the most out of AI:
 - **Who** – give AI a specific identity or environment
 - **Instructions** – clearly state what you want AI to do
 - **Subtasks** – divide your requests into smaller, manageable tasks
 - **Examples** – provide examples or templates
 - **Review** – evaluate critically



AICPA LEAD Take-aways: Addressing CPA Pipeline issues

- Multiple groups working on plans to increase the number of young adults pursuing Accounting/Passing CPA exam:
 1. Lobbying to get 529 plans to cover the CPA exam
 2. Lobbying to get Accounting included in STEM
 3. Outreach as early as 8th grade to build awareness about careers in accounting
 - a. Math intensive majors experience the lowest unemployment rates
 4. Experience, Learn, and Earn Program (ELE) -
 - allows them to earn up to 30 educational credit hours while they are in a paid accounting position - [Experience, Learn and Earn Program \(experiencelearnearn.org\)](http://experiencelearnearn.org)
 5. AICPA/PCPS - transforming the public accounting firm business model to be more attractive to younger employees. Looking at employee compensation



AICPA LEAD Take-aways: Getting Better at Getting Better

- Learning is a universal skill, and we can get better at it
- “How would I deliver this information/feedback to a learner?”
- Michael Merzenich – brain plasticity – “the machinery that controls learning is plastic”
- U.S. Olympic team – “Declaration Day” – look for opportunities to practice skills throughout your day
- Psychological safety – feeling that we can be ourselves, ask for help, speak up, mess up, take risks – like healthy soil for plants



AICPA LEAD: Overall Take-aways:

- **Determine Our Stance on AI:** Find out what our stance is as a firm. IT securities? Procedures; many are vague and stating no sharing of client or proprietary information but no limits. Consider AI training and using Udemy content. It's not going away and we could be at the forefront of utilizing this tool.
- **Leadership Coaching:** Consider vendor for phone call retainer. Spoke with someone that is accountant specific. Could do training and customize retainer type agreement. Or could go talent advisor route, vendor Spiro touches on this. Do we have trained talent advisors?
- **Share AICPA Update Slides:** Many firms are beginning to move toward a corporate structure. Overall firms need to rethink starting salaries and reconsider incentives and benefits that are more appealing to our young staff, waiting 30 years of service is not appealing because of the many other opportunities. Consider CPA exam support; extra floating holidays for studying if can't have it during down time. Credit hour gaps; bring on at 120 hours, work but get time to study? Something like that, look at slides. Working on program with LSU.
- **Train the trainer:** Ask questions; people learn and retain information better from questions.



AICPA LEAD: Overall Take-aways continued:

- **Shareholder Modeling:** Very important for buy-in from staff, truly showing support and what we want to see from our young staff. Labeling matters, consider this and show how it could be to our advantage – passion makes others feel engaged – Identify our engaged front line supervisors and mimic why.
- **Not always a Training Issue:** Identify the behavior you are looking for, it's not always a training issue.
- **Multigenerational Workforce:**
 - Understanding keeps us relevant and feel seen.
 - Unlock the Curiosity; move from “know it all to learner” – create spaces to learn the answer
 - Teach employee how to learn; set a baseline, this is what good looks like.
 - Seek participation and feedback from new employees
 - Use Reflection Q with Leader Training; leave time for 2-3 minute of self reflection specifically in leader training. Think about a time in your career someone helped you to use your curiosity, what happened? What did that feel like? How might you be able to do that for someone else? (peer, colleague, leader)



AICPA LEAD: Learning Across Generations

- Trends in the workforce:
 - People are working and living longer
 - Workforce is getting older & smaller
 - Professionals are evolving later & slower
 - Talent, skills and opportunity mismatch
 - Shifts in our relationship with work and career
- Ideas to Try:
 - Teach employees how to learn. Define what “good looks like” to set baseline
 - Executive project sponsors. Senior leaders lead small pilots of new or innovative ideas



AICPA LEAD: Learning Across Generations

- Intentionally Seek out feedback from new employees
- Model withing your team. Lead by example and communicate actions.
- Informal career conversations.
- Support beyond owning your career. More guidance around actions & practices.
- Career stories. Regular dialogue from partners around their personal career development.



Using LCvista & 3rd Party Content Providers: Marcum's experience

Using Lcvista & 3rd Party Content Providers: Anders' experience

- Migrated March 1
 - Elected to have a black-out period for 5 days after final sync
- Communication shared in stages
 - Preparation – January
 - Migration complete – March 1
 - Reminder of migration to Lcvista – April 18

Using LCvista: Keiter's experience

- Migrated in 2019 from Checkpoint Learning
- Use for all CPE tracking, accessing Becker courses, compliance reports
- Reporting features – very extensive
 - **PRO TIP!** Contact your rep for help with creating reports
- Easy to pull enrollment headcount, number of active CPAs and complete year-end compliance checks
- Store employee bios in case they serve as instructors for CPE courses



Using LCvista: KatzAbosch's experience

- Migrated from CheckPoint Learning
 - **PRO TIP!** Double-check carryover hours, LCvista calculates differently so have had to make manual adjustments.
- Challenges:
 - Outsourced IT
 - Teams integration after go-live
 - Getting used to how reports are created/structured
- Wins!
 - Go-Live communication - sent mass email with instructions and tutorial
 - Linking Teams recordings of internal sessions
 - New Hire Learning Plans
 - Ability to bulk upload CPE credits



Leveraging 3rd party content providers: Keiter's experience

- Becker CPE Library integrated with LCvista since 2021
- Initially used to provide employees the VA Ethics course
- Annually purchase a block of hours
- Staff like the extensive library catalog and the ease of searching for topics
- Staff appreciate the quality of training courses and enjoy the Becker instructors



Open Discussion

