



MNCPA

2019 – 2021 Strategic Plan

2025 Vision

- MNCPA has grown to 10,000 members
- We have become the media / government go-to entity on business and professional issues
- Revenue has increased 10% with a mix of current and new revenue sources
- We are known as a premier curator of content and a sought-after CPE resource
- The number of CPA exam candidates has increased by 20%

Goals and Objectives for FY 2019 – 2021 (3 Years)

1. Goal: Adopt technology solutions to optimize the customer experience and business operations.

- Implement new association management system (AMS) solution
- Identify training, retraining, and job description revisions based on new AMS
- Evaluate every business process and redesign to maximize new AMS

Key measurement: Increase efficiency through implementation of:

- Auto event confirmations
- Online registration for non-CPE events
- Single invoice – eliminate 5 customized invoices
- Unified shopping cart

2. Goal: Identify and develop innovative products and services to position MNCPA membership as highly-valued to current and prospective members.

- Add value to the membership proposition
 - Add CPE Log enhancements post AMS change
 - Add resources for starting a public accounting practice
 - Develop comprehensive campaign focused on emerging technology and new skill development
- Increase member engagement
 - Add one to two special interest sections
 - Increase number of YPG captains in G400 and larger firms
- Reactivate student membership

Leading indicators:

of new programs launched or major enhancements

of new members
of unique volunteers

Key measurement: 1-2% membership growth per year and membership retention rate

3. Goal: Remain a premier CPE provider by adapting product mix to market needs while positioning the MNCPA for long-term growth.

- a. Product development, both new and current programming modifications, that attracts new customers and engages younger customers
 - i. Increase simulcasting of in-person events
 - ii. Identify new skill sets and seek new partners to developing programming that helps members shift to emerging high-value skill sets
 - iii. Develop event designed to engage and develop emerging leaders
- b. Build and strengthen local instructor pipeline
 - i. Test participants in the IDP and identify high potential performers for future engagements
 - ii. Provide training on new adult education methods to experienced CPE instructors
- c. Experiment with new techniques to enhance the learning experience
- d. Market research/promotions
 - i. Evaluate and experiment with company focused marketing campaigns
 - ii. Evaluate new CPE purchase options such as subscription, loyalty and incentive programs post AMS implementation

Leading indicators:

of new programs launched
of registrations from new customers (past 3 years)
of retained customers (past 3 years)
% of members taking CPE (past 3 years)

Key measurement: On average, 1-2% net revenue growth above CPI per year

4. Goal: Improve visibility of MNCPA and members with legislators, regulators and the media.

- a. Identify and implement new initiatives to engage members in affecting public policy
 - i. Create a government relations tax committee
 - ii. New program to engage young professionals in legislative activities
- b. Facilitate group meetings between legislative/regulatory leaders and leaders from key firms to provide CPA analysis and insight
- c. Increase outreach to key media markets to support tax conformity messages

Leading indicators

of CPA Lobby Day attendees including new vs returning
of new GR initiatives

Key measurement: Number of member engagements

5. Goal: Build career awareness in high schools and colleges to guide more students to accounting careers.

- a. College outreach
 - i. Increase two and four-year college road shows to promote CPA exam, certification and the future of the profession
 - ii. Develop a program to increase MNCPA presence on college campuses
 - iii. Strengthen relationships with college educators
- b. High school outreach
 - i. Increase the number of high school presentations
 - ii. Evaluate and reformat high school career guide to better speak to iGen

Leading indicators:

of college presentations

of high school presentations

of college graduates with accounting degrees

Key measurement: Increase yearly number of CPA exam candidates on average 2-3% per year