VISION 2020... AAM’s Strategic Plan

PROCESS: “AAM streamlines operations to facilitate goal-driven action plans and organizational success.”

Strategy One: Create processes/structure to align and maximize contributions of volunteers
KPI: Detailed documentation about board and committee onboarding process and annualized committee action plans, with 75% accurate responsiveness from volunteer members in survey about each group’s goals
Responsible parties: Vice President, Strategic Communications, Committee Chairs

Strategy Two: Segment roles and responsibilities for all structures including individual committees, executive director, strategic planning task force and advisory group
KPI: Comprehensive documentation about roles, responsibilities and annualized action plans of individual committees, task forces and other leadership bodies, which also delineates decision-making responsibilities and delegation processes
Responsible parties: Vice President, Strategic Communications, Committee Chairs

Strategy Three: Identify and deploy technology to facilitate internal and external work of all organization aspects
KPI: Technology advisory group responsible for regularly evaluating technology needs and making deployment recommendations to board and executive director within scope of annualized board-approved budget
Responsible parties: Board, Executive Director, Technology Advisory Group, Website Committee

Strategy Four: Develop and deploy strategic operating action plans that are evaluated systematically and continuously
KPI: Evaluation structure empowered to evaluate progress of committee action plans with advisory capabilities to executive director and board for course corrections and resource reallocations
Responsible parties: Executive Committee, Executive Director, Vision 2020 Taskforce

Strategy Five: Capture institutional knowledge
KPI: Technology and communications platform from which institutional knowledge may be contributed and extracted with ease of use by all stakeholders including association leaders and committees
Responsible parties: Board, Executive Director, Technology Advisory Group, Website Committee

POSITIONING: “AAM delivers targeted messaging to communicate value propositions to members, firms and supporting organizations.”

Strategy One: Position AAM as the primary resource for everything related to marketing, business development, firm succession and growth in the accounting industry
KPI: Industry research metric that demonstrates target markets view AAM as top-of-mind growth resource in aided and unaided surveys
Responsible parties: ED, EC, Board

Strategy Two: Become leading aggregator and redistributor of growth and sustainability resources, co-branded with alliance partners and industry leaders using the AAM brand
KPI: Expanding membership and alliances; increasing PR metrics in media; improving use of AAM and aggregated resources delivered through the AAM “pipeline”
Responsible parties: ED, EC, Board, Strategic Communications, Member Growth, KS/TL Committees

Strategy Three: Use existing AAM content to build robust thought leadership platform for members and accounting industry
KPIs: Comprehensive content tagging system, technology recommendation/report, catalog of existing content, process for new content documentation/processing, website metrics
Responsible parties: ED, ESC, HOF, Task Force, Executive Committee, KS/TL Committee Chairs, Member Growth

Strategy Four: Partner with industry leaders and build alliances with industry groups in order to create, curate, distribute, and co-brand valuable content
KPIs: Distribution agreements with partners, increase in co-branded content, new channels for AAM content, guest bloggers, increased web traffic, social media mentions
Responsible parties: EC, Board, KS/TL Committees, Project Task Forces

GROWTH: “AAM generates revenue to build financial sustainability and facilitate organizational growth.”

Strategy One: Increase member satisfaction and retention
KPI: Achieve NPS of 75% and retention rate of 90%
Responsible parties: ED, Board, Member Growth

Strategy Two: Develop innovative sponsorship, advertising and packaged industry-relevant resources and programs that collaboratively deliver value to the industry while increasing revenue
KPI: Annual sales goals are met for products, services, and sponsorships
Responsible parties: ED, BO, KS/TL Committees

Strategy Three: Increase membership in our three primary target markets and associated revenue
KPI: Annual membership and revenue goals are achieved (1,200 members)
Responsible parties: ED, Board, ESC, KS/TL Committees

Strategy Four: Develop and deploy strategic operating action plans that are evaluated systematically and continuously
KPI: Evaluation structure empowered to evaluate progress of committee action plans with advisory capabilities to executive director and board for course corrections and resource reallocations
Responsible parties: Executive Committee, Executive Director, Vision 2020 Taskforce

Strategy Five: Capture institutional knowledge
KPI: Technology and communications platform from which institutional knowledge may be contributed and extracted with ease of use by all stakeholders including association leaders and committees
Responsible parties: Board, Executive Director, Technology Advisory Group, Website Committee

KNOWLEDGE: “AAM is the authority on CPA growth, providing thought leadership and process to key target markets.”

Strategy One: Use existing AAM content to build robust thought leadership platform for members and accounting industry
KPIs: Comprehensive content tagging system, technology recommendation/report, catalog of existing content, process for new content documentation/processing, website metrics
Responsible parties: ED, ESC, HOF, Task Force, Executive Committee, KS/TL Committee Chairs, Member Growth

Strategy Two: Create educational curriculums for different AAM member segments in order to address their needs
KPIs: State of curricula, content plan and gap analysis, recommendation on certification program
Responsible parties: ED, ESC, HOF, Task Force, Executive Committee, KS/TL Committee Chairs, Member Growth

Strategy Three: Create, aggregate and distribute top level thought leadership to target markets
KPIs: Content catalog growth, new research product, annual trends/forecast report, increase and diversify the contributors and content partners for current channels
Responsible parties: EC, Task Force, ESC, HOF, KS/TL Committees

Strategy Four: Partner with industry leaders and build alliances with industry groups in order to create, curate, distribute, and co-brand valuable content
KPIs: Distribution agreements with partners, increase in co-branded content, new channels for AAM content, guest bloggers, increased web traffic, social media mentions
Responsible parties: EC, Board, KS/TL Committees, Project Task Forces

AAM Mission
The mission of AAM is to promote excellence and elevate the professional stature of marketing, business development and other practice growth professionals to the accounting profession; directly impacting members’ professional development and careers through education, networking and thought leadership.