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

VISION 2020

Infrastructure + Systems — Process
Targeted Messaging — Positioning
Financial Sustainability — Growth
Resources, Products + Services — Knowledge

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: Board, HQ, Task Force, Committee Chairs, Website

Strategy Two: Create educational curricula for different AAM member segments in order to address their needs

KPIs: Slate 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, KT/SL 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, BD, 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

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.

Association for
ACCOUNTING Marketing
growing people and practices