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### Layers of Change



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"I don't want to change. I want all of you to change!"

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**How many years of work experience do you have?**



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What are the biggest changes you've experienced in your career?



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Handwritten lines for notes



Compared to today, how much change do you expect in the next 2 years?



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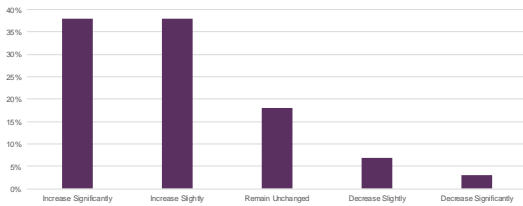
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Handwritten lines for notes



Expected Change in the Next 2 Years



PERFORMANCE FACTORS IN CHANGE MANAGEMENT, 2018-2022

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Handwritten lines for notes



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### Compared to 1980...

<b>3x</b> Pages in the Internal Revenue Code	<b>4x</b> Accounting standards	<b>5x</b> Auditing standards
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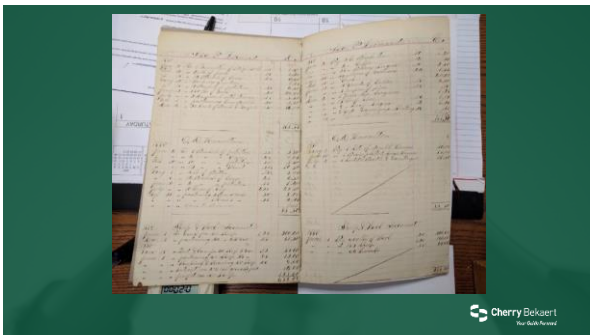
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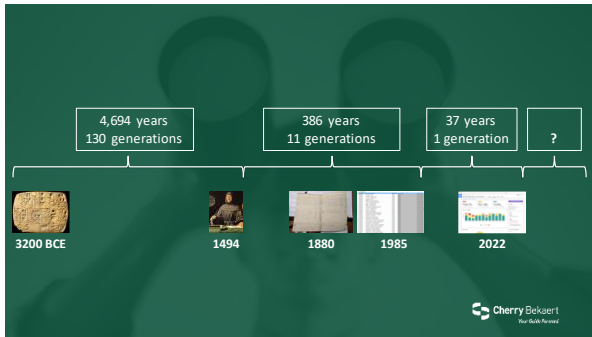
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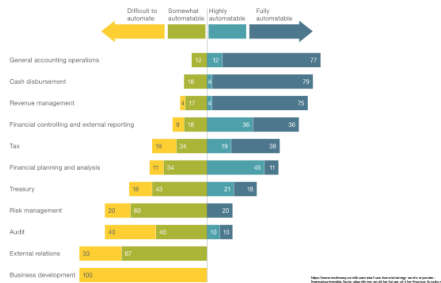
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### Today's Accounting Technologies...



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### What comes with Innovation?

- New people
- New clients / customers / users
- New partnerships
- New processes
- New services
- New tools
- MORE CHANGE**



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Isn't this all exciting?



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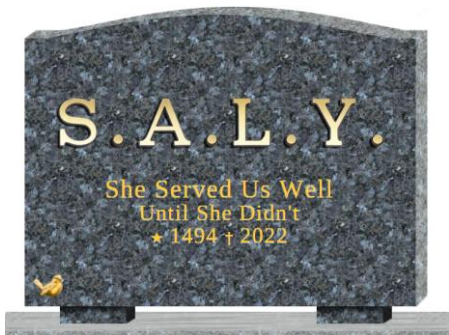
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Who wants change?

GREAT! This will be easy!

Cherry Bekaert  
Your Audit Partner

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Who wants change?

Ugh...more difficult than we thought.

Cherry Bekaert  
Your Audit Partner

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Who wants to *lead the* change?

Uhh...much more difficult than we thought.

Cherry Bekaert  
Your Audit Partner

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**Boomers and Gen X'ers love this stuff, right?**

You spend all your time thinking outside the box. I spend all my time putting everything back in.



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**Millennials and Gen Z love this stuff, right?**

Don't expect us to cheer as you turn us into factory workers and show us the machines that will replace us in one motion. This might have made sense at the partner level, but you don't show those to slaughter the way they will die.



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**What word would you use to describe change?**



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**Do any numbers here make you nervous?**

	This Year	Last Year	2 Years Ago
Cash	\$ 8,595,003	\$ 8,341,994	\$ 7,971,462
Investments	4,295,653	4,371,021	4,000,672
Land & Buildings	3,299,347	14,191,603	14,620,704
Accounts Payable	5,929,482	6,528,769	5,784,536
Accrued Payroll	1,375,733	1,232,787	1,155,631

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**Do any of these numbers make you nervous?**



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**Do any numbers here make you nervous?**

	This Year	Last Year	2 Years Ago
Cash	\$ 8,595,003	\$ 8,341,994	\$ 7,971,462
Investments	4,295,653	4,371,021	4,000,672
Land & Buildings	3,299,347	14,191,603	14,620,704
Accounts Payable	5,929,482	6,528,769	5,784,536
Accrued Payroll	1,375,733	1,232,787	1,155,631

**RISK**

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If so many of us say we embrace change, why do so many adoption initiatives fail?



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**Japan's Henn na Hotel fires half its robot workforce**

by Esther Hertzfeld | Jan 31, 2019 10:16am



Henn na Hotel guests complained that robots at the front desk could not answer basic questions. Photo credit: AP/© G. Liu



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The humans are missing!



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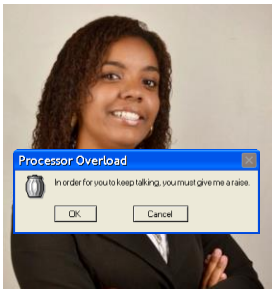
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Donna, can you believe we've been on this system for a whole year? Maybe it's time to start looking at new ones.

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Stan, just a heads up that robots will be doing your job in a couple years. Cool, huh?

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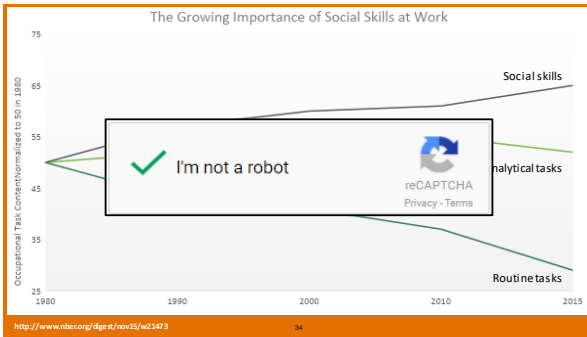
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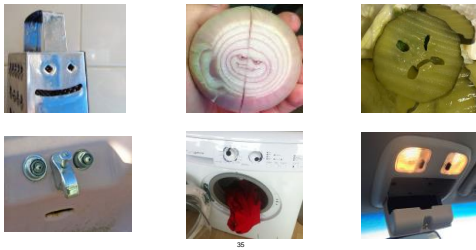
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### Hardwired for Human Connection



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### Change is exhausting us

#### Fatigue Point for the Average Employee



Source: MetLife Change Impact Survey, April 2021

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Let's take a 10  
minute break



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**Get Good at Change... (or elsa)**



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**How Change Can Feel Without a Strategy**



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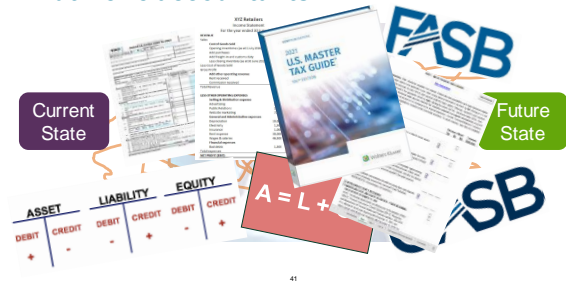
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### But we're accountants!



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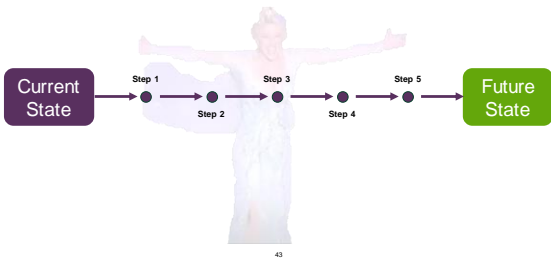
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### How Change Feels WITH a Strategy



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It's time to change the way we change

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### How important is leadership participation in the success of change efforts?



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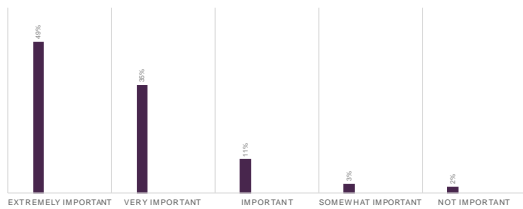
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### How important is leadership participation in the success of our change efforts?



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### On a scale of 1-5, rate how well your Organization develops solutions.



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On a scale of 1-5, how well your Organization achieves adoption of those solutions?



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### Predicting the Success for Change



Quality of Technical Solution X Effective Acceptance of Solution = Chance for Lasting Adoption

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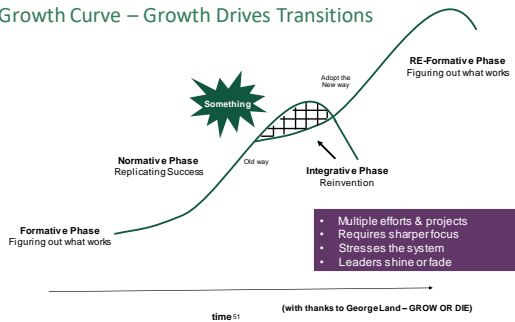
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### The Growth Curve – Growth Drives Transitions



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### Agility & Adaptability are now required

Get good at the transitions and changes get easier.




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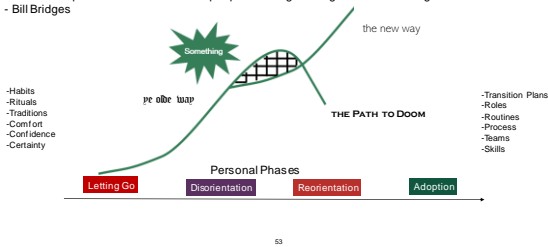
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### Understanding Transition

"Transition is the state that change puts people into. The change is external (i.e., the new technology platforms, product portfolios, or organizational structure the business is trying to bring about), while transition is internal – a personal reorientation that people have to go through before the change can work."  
 - Bill Bridges




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### Your Role in Leading Transitions

Translator

Encourager

Role Model

Cherry Bekaert  
Your Audit Partner

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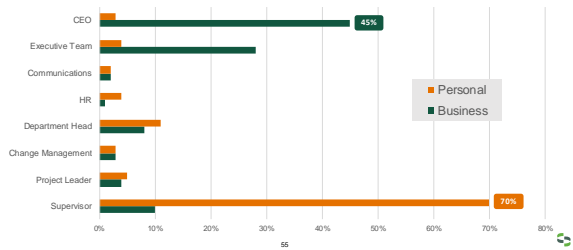
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### Who do people want to hear from about change?



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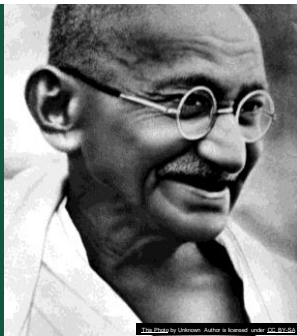
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### Role Model

For people to change, I must change.



Cherry Bekaert  
Your Skills Partner

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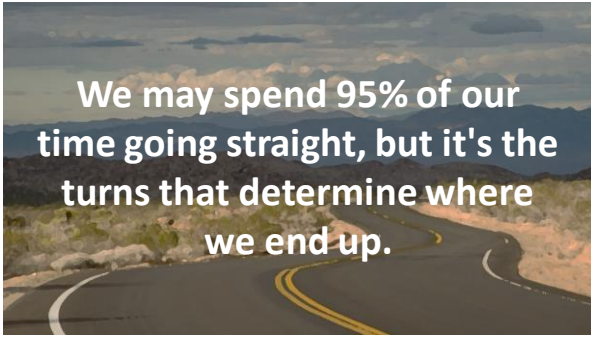
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