



Agenda

A & A Leaders Collaboration Group – North American Region November 11, 2025, 8:00 am to 5:00 pm

1. Standards Issues (potential speaker from AICPA – Center for Plain-English Accounting (CPEA))
 - a) New QM Stds. – Proposed Statements on Quality Management Standards & ISQM1
 - b) Lessons learned around implementing new Standards
 - c) Open discussion on other topics
2. Technology Issues
 - a) AI / ChatGPT
 - b) Dynamic Audit Solution (DAS)
 - c) What's new
 - d) Open discussion on other topics

9:50 – 10:10 Morning Break

3. Client Issues
 - a) Best practices re: Client retention
 - i) Scoring - criteria
 - ii) Educating
 - iii) Terminating
 - b) Open discussion on other topics

Noon – 1:00 Lunch

4. Practice/Quality/Risk Management
 - a) Update Collaboration Group Initiatives i) A&A levels training
 - ii) Annual A&A update
 - iii) National A&A Resource Center
 - iv) Manager Soft Skills Training
 - b) Open discussion on other topics

2:50 – 3:10 Afternoon Break

5. Staffing
 - a) Scheduling for learning & development
 - b) Coaching & developing future leaders
 - c) Generational skills gap
 - d) Contract v employee
 - e) Off-shoring – how do you get buy-in
 - f) Open discussion on other topics