

2030 Strategic Roadmap

with Regional Priorities



Rising Star Association



INTERNATIONAL ACCOUNTING BULLETIN

Mission, Vision & Values

Mission: Deliver opportunities and channels to enhance client service, facilitate growth, and advance professional development.

Vision: Empower mutual, scalable success through unmatched collaboration.

Values:



Tomorrow



Fun



Transparency



Trust



Commitment



Inclusion

Pillar #1: Talent

OUTCOMES

- **Elevate the profession:** Position accounting as a rewarding career choice.
- **Foster lifelong learning:** Provide unique development opportunities for members at all stages.
- **Strengthen connections:** Encourage peer-to-peer networking and collaboration.

KPIs

- Launched a global brand campaign to promote the accounting career
- Provides a comprehensive professional development catalogue
- Offers signature programs like the Global Talent Exchange and regional cultural experiences
- Achieves a Net Promoter Score of 9 or 10 for Collaboration Groups, indicating exceptional satisfaction.

Pillar #2: Alliances

OUTCOMES

- **Thriving community:** Promote active member engagement and knowledge sharing.
- **Strategic relationships:** Establish best-in-class hubs for strategic relationship building, crucial for member growth, client service and talent management.

KPIs

- Built community hubs with resources to cultivate successful member-to-member partnerships
- Member firms collectively report \$50 million in revenue generated through referrals
- Members leverage an average of five peer firm capabilities through strategic relationships fostered by the community hubs

Pillar #3: Growth

OUTCOMES

- **Extensive global network:** LEA Global boasts a diverse membership across key markets, industries, and service lines.
- **Strong referral program:** Members actively recommend LEA Global to potential firms, fostering community growth.
- **Partnership network:** LEA Global collaborates with leading peer organizations to drive expansion.

KPIs

- LEA Global boasts a thriving community of 200 firms
- LEA Global is consistently ranked among the top 3 associations in all regions (IAB survey)
- All member firms actively participate in the association
- LEA Global programs deliver strong financial performance (specific metric to be determined)
- LEA has pursued at least 5 M&A / joint venture conversations

Pillar #4: Transformation

OUTCOMES

- **Empower professional service firms:** LEA is a leading association that equips members with cutting-edge advancements in growth, operations, technology, client service and talent management.

KPIs

- Hosts an annual showcase highlighting member and partner solutions shaping the future of the profession
- Positions LEA Global as a hub for future-focused insights in association management, firm management, talent, technology and industry trends

Global Themes

Global Theme	Pillar	Regions
Build community hub with resources to advance Global Talent Exchange .	Talent	APAC
Reset Collaboration Groups to align with LEA and member firms’ strategy and pursue specific business outcomes.	Talent	All regions
Grow attendance and engagement in regional conferences and deepen learning as a means to seed future programming.	Talent	All regions
Establish a framework to drive strategic alliance activity between members, share best practices, spotlight successes, and demonstrate value and differentiation.	Alliances	All regions
Develop annual regional growth plans highlighting member engagement, new member acquisition and pipeline management.	Growth	All regions
Firms have a clear understanding of member expectations , action plans to deepen engagement, and derive value through increased participation.	Growth	MENA APAC LATAM
Cultivate a thought leadership discipline that provides actionable insights, best practices and educational resources for members to optimize their talent management, strategic partnerships, growth, and technology adoption.	Transformation	Europe North America

The Charge

- As a group, you are the Executive Committee of a member firm in LEA Global.
- Understanding the strategy and pillars, your charge is to develop ideas and plans to align your own strategy with LEA Global's as a way to create value across the community, while creating incremental value to your own.

The Timeline

DATE	TASK	COMMENTS
May 1	<ul style="list-style-type: none"> Understand the project Make introductions Identify group leader Develop game plan 	Small group time dedicated for the last three items
May 5 – 20	<ul style="list-style-type: none"> Conduct at least 2 meetings Develop presentation draft 	Contact advisor with questions or clarifications
May 28	Meet at least once with advisor	Consider additional get together during conference
June 2 or 3	Deliver presentations	Presentations will be 20 minutes each (2 groups)
June 9	Group leader schedules debrief meeting	LEA asks that feedback be shared

Group Assignments

GROUP ONE		GROUP TWO	
NAME	FIRM	NAME	FIRM
Courtney Catlin	Brown Plus	Amanda Moats	Brown Plus
Tim Benson	KLR	Liz Harman	KLR
Julio Vega	BeachFleischman	Katelyn Becker	BeachFleischman
Philip Spagnolo	Fuller Landau	James Weddington	BeachFleischman
Sarah Seefeldt	Richey May	Rachel Walter	Richey May
Teresa Marangon	Keiter	Rebekah Tucker	Anders

Small Groups

- Introductions
- Confirm everyone understands the project
- Identify group leader
- Develop game plan, including scheduling calls

