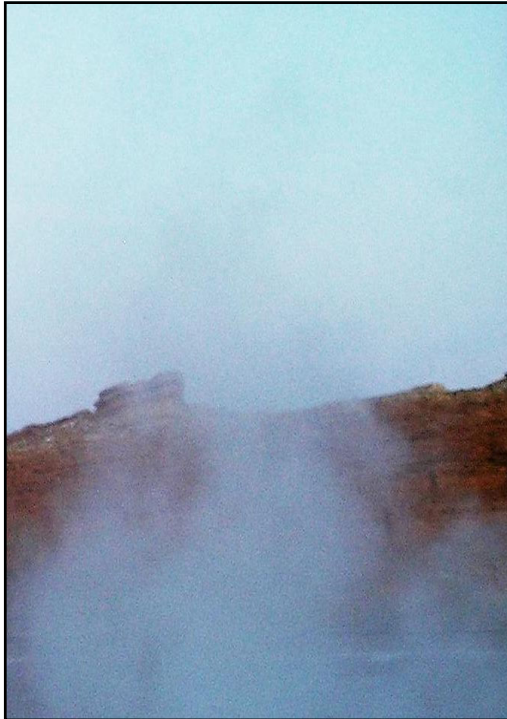


# The 3 C's of Keeping Women in the Partnership Pipeline

THE 2019 ACCOUNTING MOVE PROJECT REPORT:  
DATA AND STRATEGIES FOR PROMOTIONS,  
PLATEAUS AND POSSIBILITIES



1



Where did  
they go?

2



**When women  
quit, firms lose.**

3



**MOVE** measures results,  
not just programs and intentions

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M = Money

O = Opportunity

V = vital supports for work-life

E = entrepreneurship/business development

4

## MOVE measures results, not just programs and intentions

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Founding sponsor: Moss Adams

National sponsor: CohnReznick

2019 Diversity study sponsor: Grant Thornton

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## While women remain about 50% of all CPA firm employees.....

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Women on firm management committees

**2019: 33%**

2018: 25%

2014: 19%

6

## While women remain about 50% of all CPA firm employees.....

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Women partners & principals:

**2019: 27%**

2018: 24%

2014: 19%

7

## While women remain about 50% of all CPA firm employees.....

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Women senior managers:

**2019: 44%**

2018: 46%

2014: 44%

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## Firms are retaining more women in their partnership pipelines

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**2019: 39% DROPOFF FROM SR. MANAGER TO  
PARTNER & PRINCIPAL**

**2014: 57% DROPOFF FROM SR. MANAGER TO  
PARTNER & PRINCIPAL**

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## What Works?

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## Context for Career Decisions

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- What's next?
- How do I get there?
- Will it be worth it?

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## Coaching That Adds Insight

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- Synchronize growth experiences with skill development & confidence building
- Interpret, explain, forecast career steps What's next?

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## Cohorts – Otherwise Known as Friends

- Peer influence: the hidden silver bullet
- Unique advantage for afwa
- Escalates in importance as number of peers shrinks further in the pipeline

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## Cohorts – Otherwise Known as Friends

- Renews importance of women's initiatives
- Avoid diluting women's initiatives with diversity
- Plante moran model: all for women & women for women
- Mcm: lead with women's events to win in new markets

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## 5 Ways to Tell Your Firm's Diversity Story

- Pitch package – D&I process
- Invest in local women-owned & diverse businesses  
– *MCM, Lurie, BeachFleischman, Plante Moran*

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## 5 Ways to Tell Your Firm's Diversity Story

- Co-host training, events *with* clients (not just for clients)
- Be an expert for news stories on process – not perfection
- Leaders share personal journeys – don't ask only diverse talent to share – *Marcum, Rehmann, BPM*

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## 2020 Accounting MOVE Project

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- Theme: New practices, new opportunities for women
- Confidential benchmarking report
- Potential mention in reports & *Public Accounting Report* executive summary
- AFWA Best CPA Firms for Women & Best CPA Firms for Equity Leadership lists
- Registration open NOW
- Admin fee & transparent process

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## 2020 Accounting MOVE Project

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- SIGN UP AT [WWW.WILSON-TAYLORASSOC.COM](http://WWW.WILSON-TAYLORASSOC.COM)
- SIGN UP BY DEC. 18, 2019
- COMPLETE YOUR FIRM'S SURVEY BY FEB. 17, 2020
- RECEIVE CONFIDENTIAL BENCHMARKING REPORT IN EARLY JUNE 2020

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