



2018 Accounting MOVE Project Snapshot or Scorecard?

Should your firm get the Accounting MOVE Project Snapshot or the Scorecard?

Both are confidential and based on aggregate MOVE research as well as your firm's data and interviews with select employees. This data is not available anywhere else, and equips your firm with invaluable trend data and benchmarks. Here's how they differ and factors to consider when deciding which is best for your firm.

New in 2018! Minority demographics and benchmarks included only in MOVE Scorecards! The Accounting Diversity and Inclusion Report sponsored by Xero is based on the same Accounting MOVE Project survey firms have been completing since 2010. The ongoing MOVE survey now supports additional breakouts to support both a new report focusing on minority and diverse staff and greatly enriched benchmarks for your firm's MOVE Scorecard.

What's Included in the Snapshot

The **Snapshot** is covered in your firm's administrative fee. It includes several demographic benchmarks and two pages of custom analysis. If your firm has fewer than 150 employees *and* women comprise at least 30% of all partner and principals, the Snapshot might give you sufficient feedback.

The **Snapshot** includes these demographic categories:

Women employees, managers, senior managers, directors, principals/partners and management committee for:

- Your firm for all years of MOVE participation
- The average based on the current year's MOVE Project
- Your firm's quartile, based on the number of employees

What's Included in the Scorecard

The **Scorecard** is comprehensive and is available for an additional fee. (Please see the fee schedule at <https://www.wilson-taylorassoc.com/move/accounting>.) It includes at least four pages of custom analysis, additional benchmarks on all data points in the MOVE survey, along with detailed how-to's and recommendations relevant to your firm's size, growth challenges, recruiting goals, and progress in advancing women.

Choose the Scorecard if your firm has fewer than 30% women partners and principals or has more than 150 staffers, as that's typically the point where culture alone cannot reliably ensure momentum in advancing women.

The **Scorecard** includes these demographic categories:

Women employees, managers, senior managers, directors, principals/partners and management committee for:

- Your firm for all years of MOVE participation
- The average based on the current year's MOVE Project
- Your firm's quartile, based on the number of employees
- The averages for the current year's "Best CPA Firms for Women" list
- Racial/minority demographics – all employees – for your firm and the MOVE aggregate
- Racial/minority demographics /women – for your firm and the MOVE aggregate
- Employee resource/affinity groups that your firm offers compared to the % of firms that offer each type of affinity group
- Additional benchmarks are available on a custom basis, when the comparative breakout comprises at least 10 firms and will preserve the confidentiality of MOVE firms

What is the price difference between a Snapshot and a Scorecard?

Fees are based on firm size (number of employees). Please refer to the [MOVE Fees and Methodology](#) summary.

What kind of qualitative topics are included in the Accounting MOVE Project Scorecard?

To illustrate the scope of the scorecard, here is the template table of contents for the 2015 Accounting MOVE Project scorecards. These "Scorecard Extras" are additional case studies and short articles that go into greater depth about topics relating to the annual Accounting MOVE Project theme and the ongoing MOVE research about best practices for CPA firms for Money (pay equity); Opportunity; Vital support for work-life; and Entrepreneurship and Business Development.

Best Practices to Use Today: Customized feedback and recommendations for your firm on the MOVE factors plus unique challenges you face. Plus:

M

- The Equity Pot: A Fair Way to Correct Pay Inequity
- Market rate for all, including a three-step process for review of pay decisions
- Will your employees negotiate like Charlize? (Theron, referencing pay equity advocacy by celebrities.)

O

- How to win top-level buy-in for initiatives and results
- The “Plaid” Strategy for Women’s Initiatives: Supporting Office “Verticals” with “Horizontal” Programs and Leadership
- Increase Visibility of High-Potential Pools
- Guiding Leaders Through Transitions
- Senior Staff: Future Owners
- Three Ways to Craft Your Career Story to Inspire & Lead

V

- Making a Virtue of Flexible and Virtual Work
- From Cultural to Formal Flexwork in Three Easy Steps – and a Sample Memo
- Three Steps for Career Conversations

E

- Use your CRM system to Measure Women’s Initiative Results
- How to Choose a Women’s Initiative Liaison for an Office
- Fluff or the Right Stuff? Score Your Women’s Initiative

Here is the link for signing up for the 2018 Accounting MOVE Project:

<http://wta-moveproject.com/MoveAccounting2018.html>

Questions? Please contact Joanne Cleaver, Accounting MOVE Project manager, at jycleaver@wilson-taylorassoc.com, or Shelley Moench-Kelly, at skelly@wilson-taylorassoc.com.

9.5.17 /jyc