

# Welcome to CharterGroup Conference 2025

**Empowering Sustainable Growth**



**Victoria Browning**



**Jon Lisby**

# DOWNLOAD GUIDES & PRESENTATIONS

**Gro:**

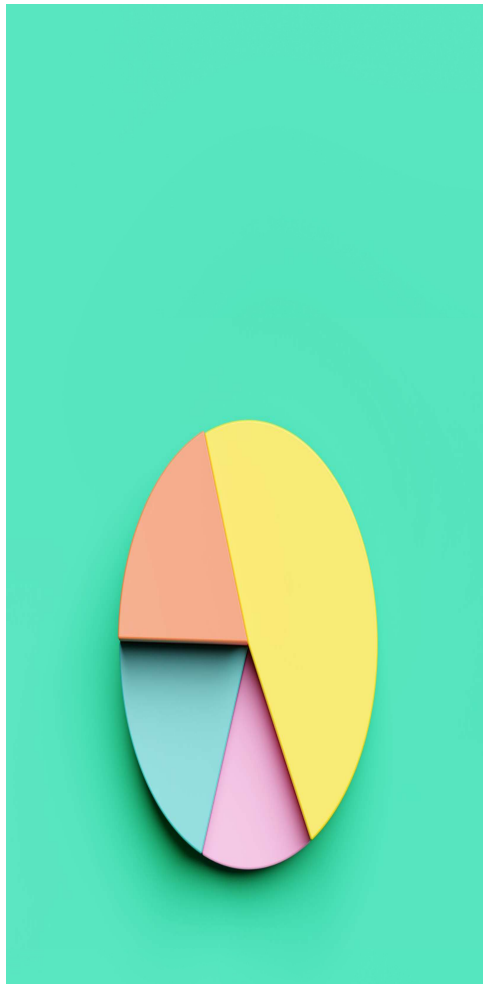


**Swoop**





PEOPLE



PRODUCTIVITY



PROFILE



PROTECTION

cg chartergroup



POWER OF  
MANY



# PEOPLE

The people within our business play a crucial role in the success. We must acknowledge and value their contributions which will greatly elevate their performance. Attracting and retaining the best talent is one of the biggest challenges accountancy firms face today

## Why It Matters:

We help our member firms build motivated, high-performing teams.

## Access to:

- **Specialist Recruitment & Retention:** Attract top-tier talent with strategies proven to work in the accountancy profession.
- **Exclusive Training & Development:** Equip your team with industry-leading skills to outpace competitors.
- **Tailored HR Support:** Resolve your firm's unique people challenges with expert guidance.

**Gro:** GJC

**HAYS**

**merc**ia





# PRODUCTIVITY

Administrative burdens and inefficient systems are a drain on your time and profits. we focus on eliminating inefficiencies with solutions designed for accountancy firms.

## Why It Matters:

Streamlined processes mean more time for your team to focus on delivering outstanding accountancy services.

## Access to:

- **Exclusive Best Practices:** Optimise client intake, case management, and billing for faster turnaround times.
- **Risk Management Integration:** Simplify compliance and reduce errors with proactive risk solutions built into every process.
- **Exclusive Training & Development:** Equip your team with industry-leading skills to outpace competitors.



circuit



WhisperClaims





# PROFILE



We don't want to just improve your visibility, we want to position your firm as the go-to authority in your area of expertise, connecting you directly with clients who need your services. Cultivate a strong employer brand to attract top talent and enhance your firm's reputation. Seamlessly manage reviews to uphold a positive online presence, fostering trust and credibility.

## Why It Matters:

A powerful profile doesn't just enhance your reputation, it drives real results by attracting qualified leads, fostering stronger relationships, and establishing you as the first choice in your market.

## Access to:

- **Marketing Expertise:** From SEO to social media, tailored to accountancy firms, so you stand out where it counts.
- **Enhanced Recruitment Profile:** Compete effectively in the labour market and drive employee loyalty through effective recruitment, engagement & retention practices.
- **International Outreach:** Meeting client needs locally and internationally by fostering connections with the right firms, in the right locations.
- **Review Management Like No Other:** Build trust by proactively managing client feedback, transforming positive reviews into powerful marketing assets.



INDEPENDENT MEMBER OF





# PROTECTION

The accountancy landscape is complex, and staying compliant is a non-negotiable challenge. We provide access to comprehensive risk management solutions designed specifically for accountancy firms.

## Why It Matters:

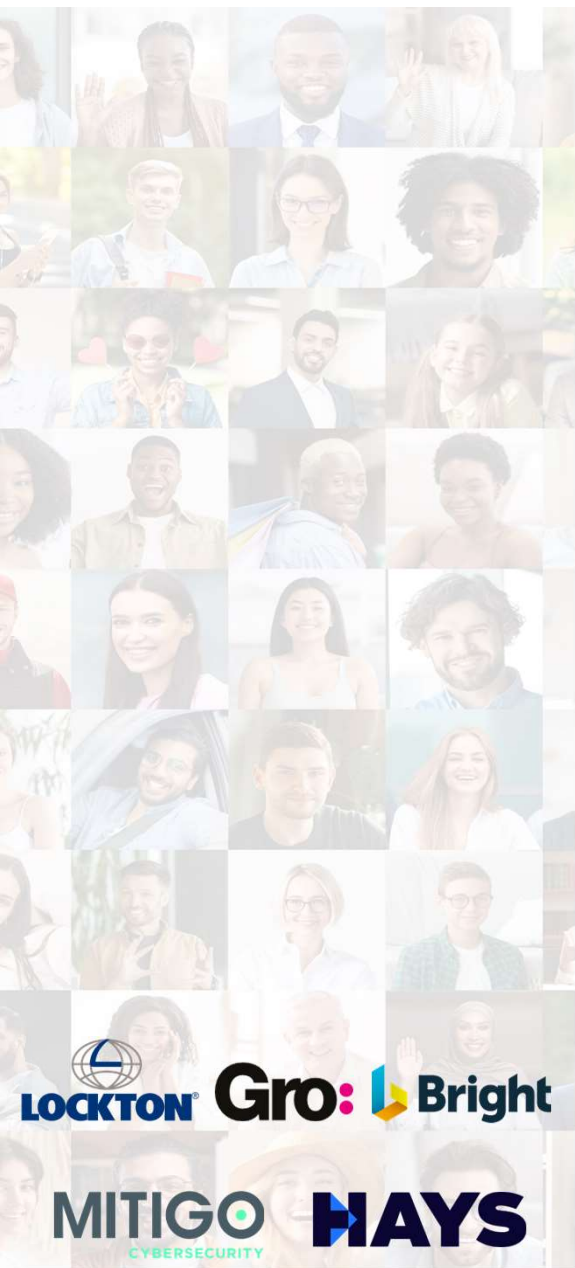
We help you safeguard your operations, protecting your reputation and ensuring peace of mind.

## We help you keep your firm safe and protected-

- **PII and Compliance Support You Can Trust:** Avoid costly mistakes with tailored professional indemnity insurance and compliance expertise.
- **Proactive Risk Management:** Mitigate operational risks before they impact your business, an edge your competitors lack.
- **Exclusive Cyber Security Services:** Keep your systems secure with solutions tailored to the unique needs of accountancy practices.







# POWER OF MANY

Leverage the Power of Many for streamlined collaboration and enhanced results, securing cost savings with suppliers and tapping into diverse thought leadership within the Chartergroup alliance. Utilise various sources for information sharing and research, staying ahead of industry trends. Engage with the dynamic Chartergroup community through conferences and events. Together, we achieve more.

## Why It Matters:

In today's competitive market, going it alone isn't enough. By being a member, you tap into exclusive opportunities to strengthen your firm.

## Access to:

- **Exclusive Supplier Discounts:** Save on tools and services negotiated specifically for Chartergroup members.
- **Knowledge Sharing:** Learn from the successes and insights of like-minded firms in our alliance.
- **Unrivalled Networking Opportunities:** Build lasting connections at events and conferences tailored to your challenges and goals.



# THE STORY BEHIND THE NUMBERS



# MANAGING PARTNERS FORUM - 8 OCTOBER

- 12 participating member firms

## Objectives

- Consider performance over multiple areas
- Compare & discuss in an open trusted environment, under Chatham Rules.
- Desired outcome – each firm to identify action areas to enhance performance



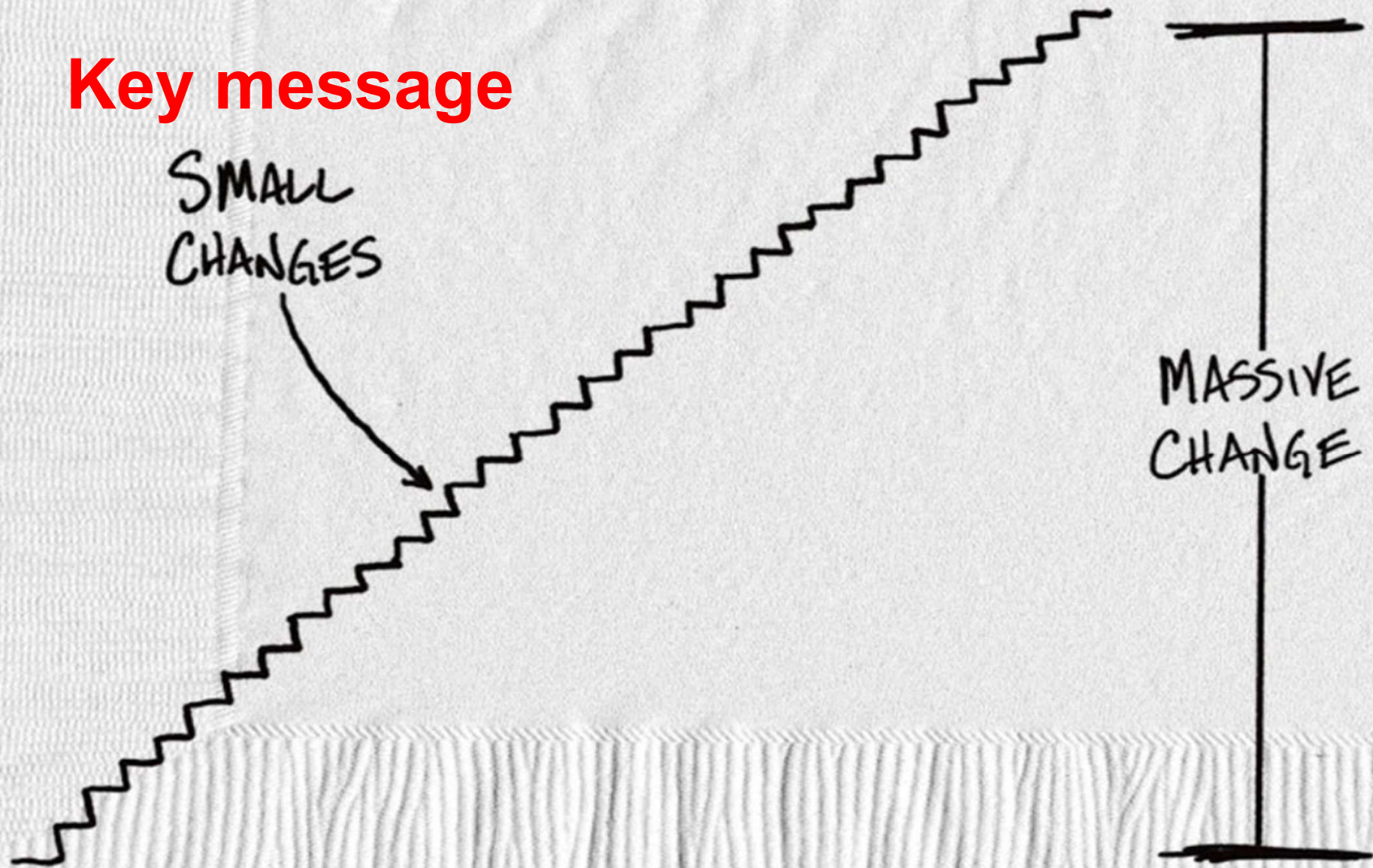
# BENCHMARKING REPORT 2025



# WIDE RANGING & IN-DEPTH DISCUSSIONS

- **Introduction** (Slides 1-6)
- **Participating firms** (Slides 7-8)
- **Company structure** (Slides 9-10)
- **Income and profit analysis** (Slides 11-21)
- **EBITDA** (Slides 22-23)
- **Income by service line** (Slides 24-28)
- **Salaries** (Slides 29-37)
- **Recovery rates** (Slides 38-39)
- **Funding** (Slides 40-41)
- **Lock up** (Slides 42-43)
- **Costs** (Slides 44-58)
- **Productivity** (Slides 59-64)
- **Merger and Acquisition** (Slides 65-66)
- **Environmental, Social, and Governance (ESG)** (Slides 67-69)
- **Price increases** (Slides 70-71)
- **Employee Wellbeing and DEI** (Slides 72-75)
- **Challenges in the coming year** (76-79)
- **Technology investment** (Slides 80-83)
- **Future topics and other comments** (Slides 84-87)

## Key message





## THE IMPACT OF MARGINAL PERFORMANCE IMPROVEMENTS

An increase of 1% in price, volume and gross margin of 1%  
all other factors unchanged

	Now	Sales up 1%	Volume up 1%	GP % up 1%
	£'000	£'000	£'000	£'000
Fee income	5,000	5,050	5,101	5,101
Gross margin %	60%	60%	60%	61%
Gross Profit	3,000	3,030	3,060	3,111
Net profit	1,250	1,280	1,310	1,361
Net Profit %	25%	25%	26%	27%
PROFIT INCREASE		2%	5%	9%

## 2024 Chartergroup Conference considered strategies for improving performance/profit

Justify higher fees (specialise, innovate, add more value)	Increase utilisation (more chargeable hours per person)	Find ways to use more juniors	Drop unprofitable/ low profit services	Drop unprofitable clients
Improve speed of billing	Use marketing to get better not just more work	Invest in new high value services	Develop processes to improve job efficiency	Improving skills & performance of managers
Accelerate skill building for staff	Engage more unqualified and/or offshore	Reduce building costs	Reduce support staff costs	Deal with underperforming staff (and partners!)

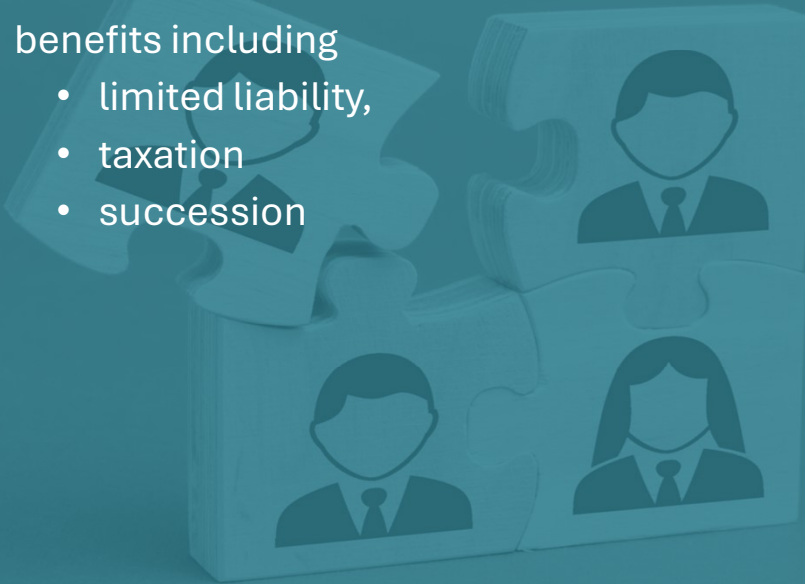
Some have quick impact, some a long-lasting impact

# THE STORY BEHIND THE NUMBERS – FIRM STRUCTURE

- 90% have selected Ltd Co.

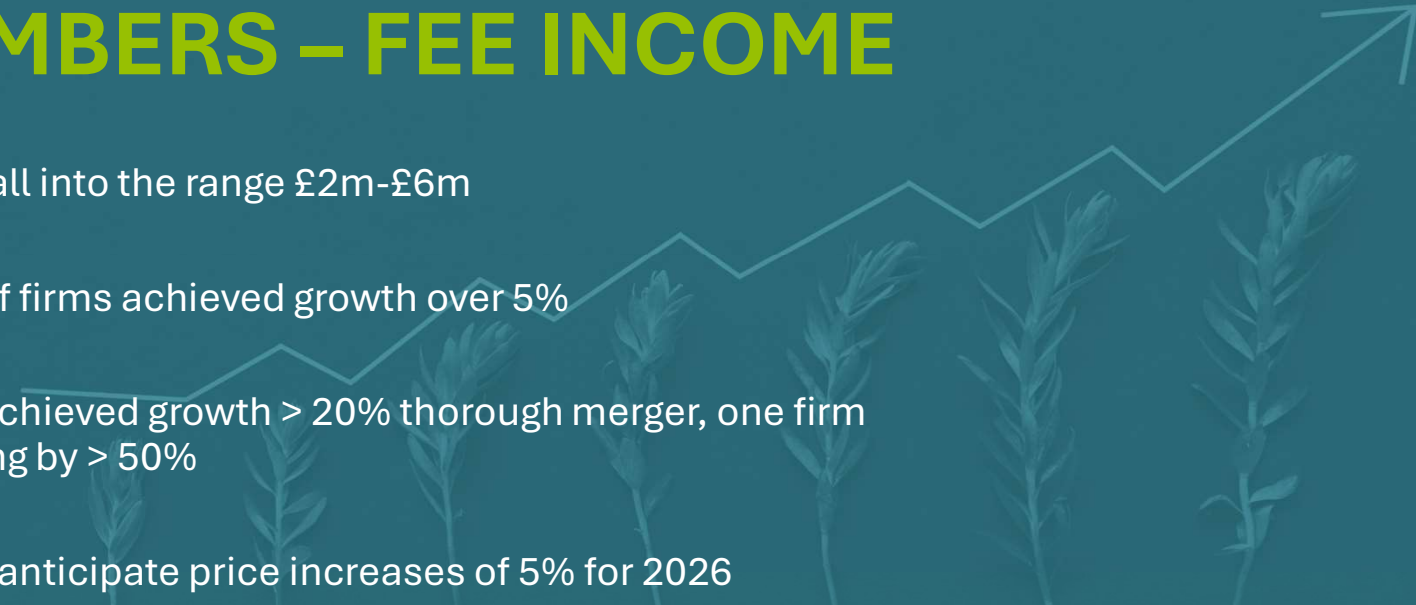
benefits including

- limited liability,
- taxation
- succession





# THE STORY BEHIND THE NUMBERS – FEE INCOME

- 60% fall into the range £2m-£6m
  - 90% of firms achieved growth over 5%
  - 25% achieved growth > 20% thorough merger, one firm growing by > 50%
  - Firms anticipate price increases of 5% for 2026
- 

# SERVICE LINES

- Traditional core services still account for 90%:-

- Accounting
- Taxation
- Audit
- HR & payroll

- Could service offering be extended?

- Experience
- Expertise
- Efficiency



# FEE INCOME PER CLIENT

- Generally average fees per client are £1,100
- 25% achieve more than double
- (Goodwill excluded)

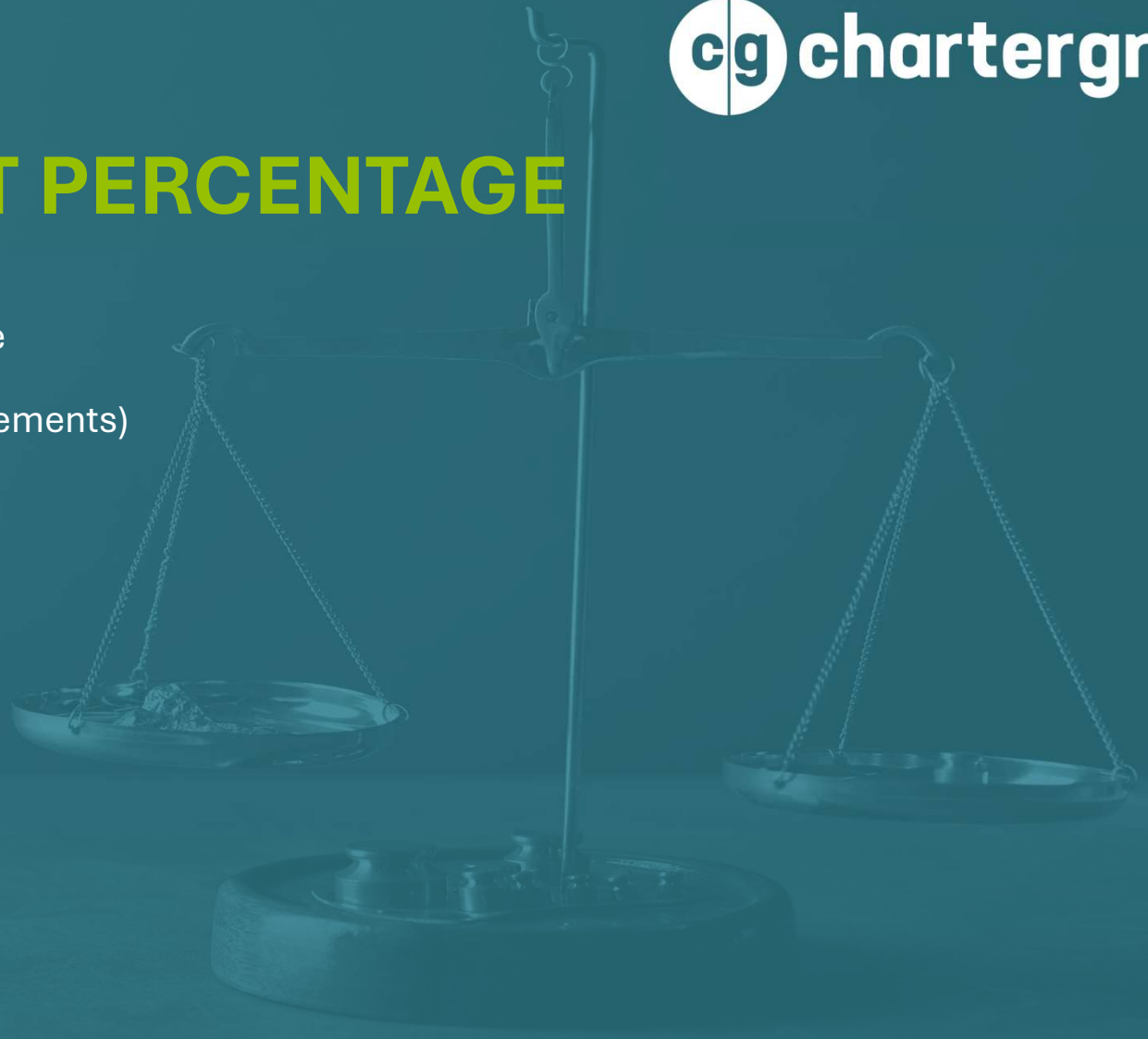
# FEE INCOME PER FTE EMPLOYEE

- Fee income divided by the number of FTE fee earning staff
- £89,000

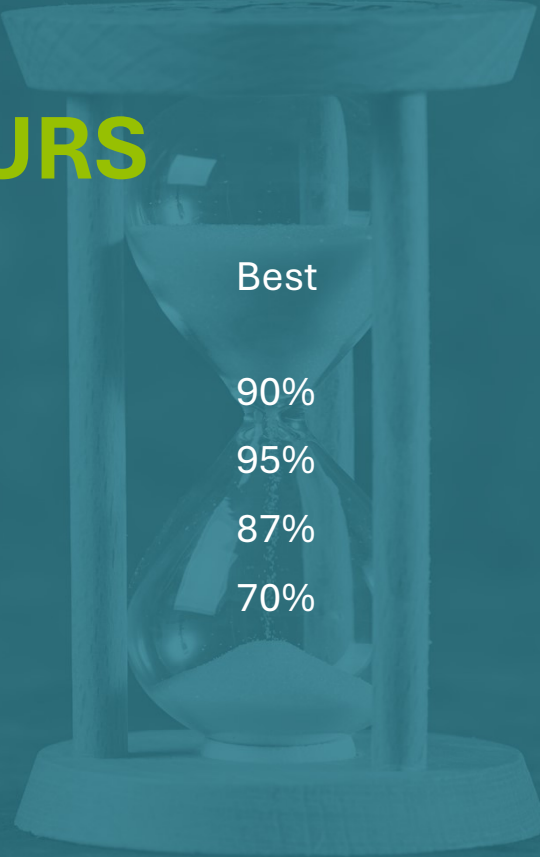


# GROSS PROFIT PERCENTAGE

- GP % Fee income divided by the number of FTE fee earning staff (Fees less staff costs & disbursements)
- Average 60%
- Best performer >70%



# UTILISATION - % CHARGEABLE HOURS

A large, faint hourglass graphic is centered in the background of the table, symbolizing the passage of time and the measurement of billable hours.

	Median	Best
• Trainee	78%	90%
• Newly qualified	85%	95%
• Manager	75%	87%
• Partner	50%	70%

# LOCK UP

	Median	Best	Worse
• WIP	52	32	>100
• Debtors	64	41	>100
• Total	116	76	191

For a £3 firm – improving total lock up by 30 Days  
– would generate c.£250K.

## AVERAGE COSTS - % OF FEE INCOME

• Support staff	6%
• Property	6%
• Marketing	2%
• Training	1%
• IT	6%
• PI Insurance	0.5%
• Other	9%
• <b>Total</b>	<b>30%</b>





# How optimistic are CharterGroup firms about the next 5 years?

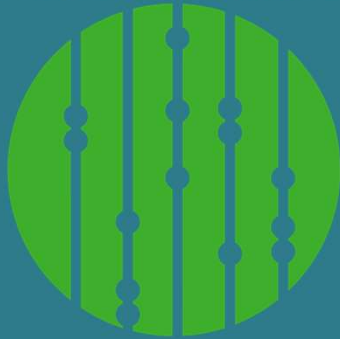
VERY OPTIMISTIC	50%
OPTIMISTIC	25%
<b>VERY OPTIMISTIC or JUST OPTIMISTIC</b>	<b>75%</b>
NEUTRAL	25%
NOT OPTIMISTIC	0%

**OPTIMIST:**  
**THE GLASS IS HALF FULL**

**PESSIMIST:**  
**THE GLASS IS HALF FULL**

**ACCOUNTANT:**  
**HOW MUCH DID  
THE GLASS COST?**

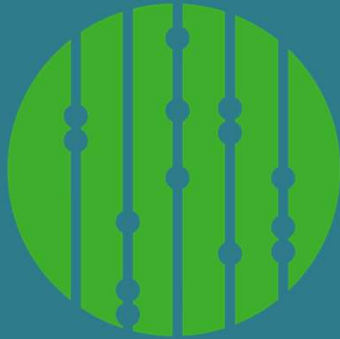
INDEPENDENT MEMBER OF



**ABACUS**  
WORLDWIDE

- All CharterGroup firms are members.
- Promoting your membership raises your firm's profile in its local market.
- Asserts quality and international capability
- Fly the flag on your website with wording to explain the benefit to clients & prospects

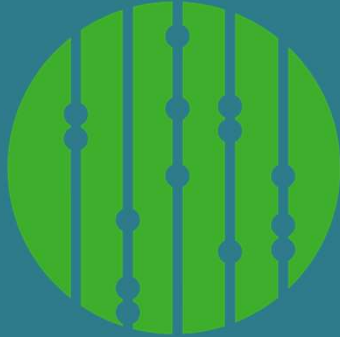
INDEPENDENT MEMBER OF



ABACUS  
WORLDWIDE

- Abacus is represented by 112 firms (incl 17 legal) in 56 countries.
- 64 member firms are based in EMEA
- **51 referrals recorded:  
Inbound 12/Outbound 39**

INDEPENDENT MEMBER OF



ABACUS  
WORLDWIDE

## Events

- **Quarterly SIGs** – Audit, Tax, M&A & Legal
- **World Conferences (AGM)**
  - November 2025 - Sydney
  - November 2026 - Rome
- **EMEA Conference**
  - May 2026 - Paris





**GJC**



## Powering Practice Growth: Supplier Showcase





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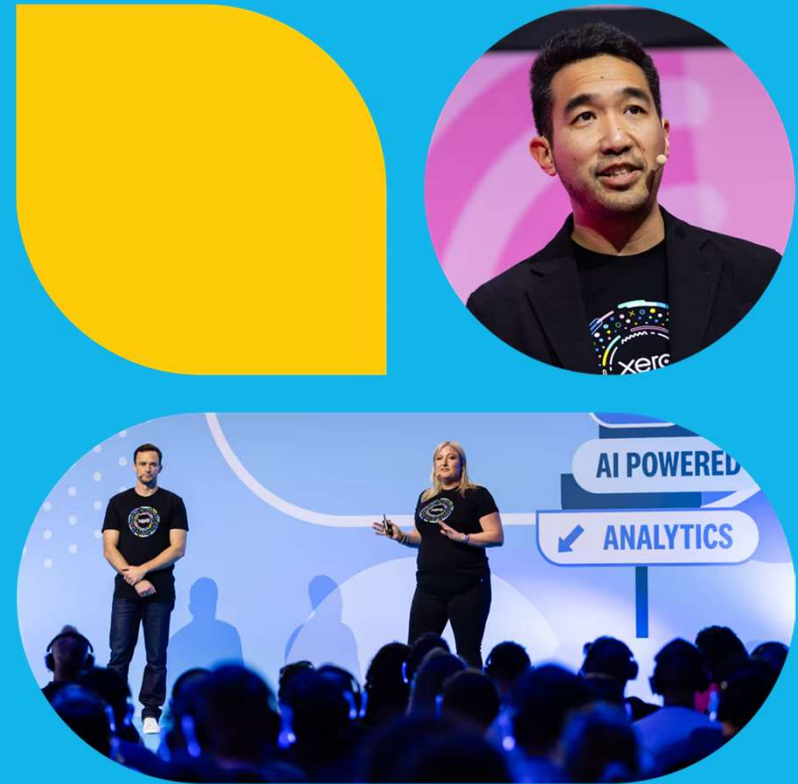


The Xero logo, consisting of the word "xero" in a lowercase, sans-serif font, is positioned inside a white circle. This circle is set against a larger, light blue circular background element. The entire slide has a solid blue background with faint, larger-scale geometric patterns of circles and crosses in a lighter shade of blue.

xero

# Xero Product Developments Snapshot

# Headline announcements from Xerocon Brisbane



External(np)

xero

# The evolution of Just Ask Xero (JAX)

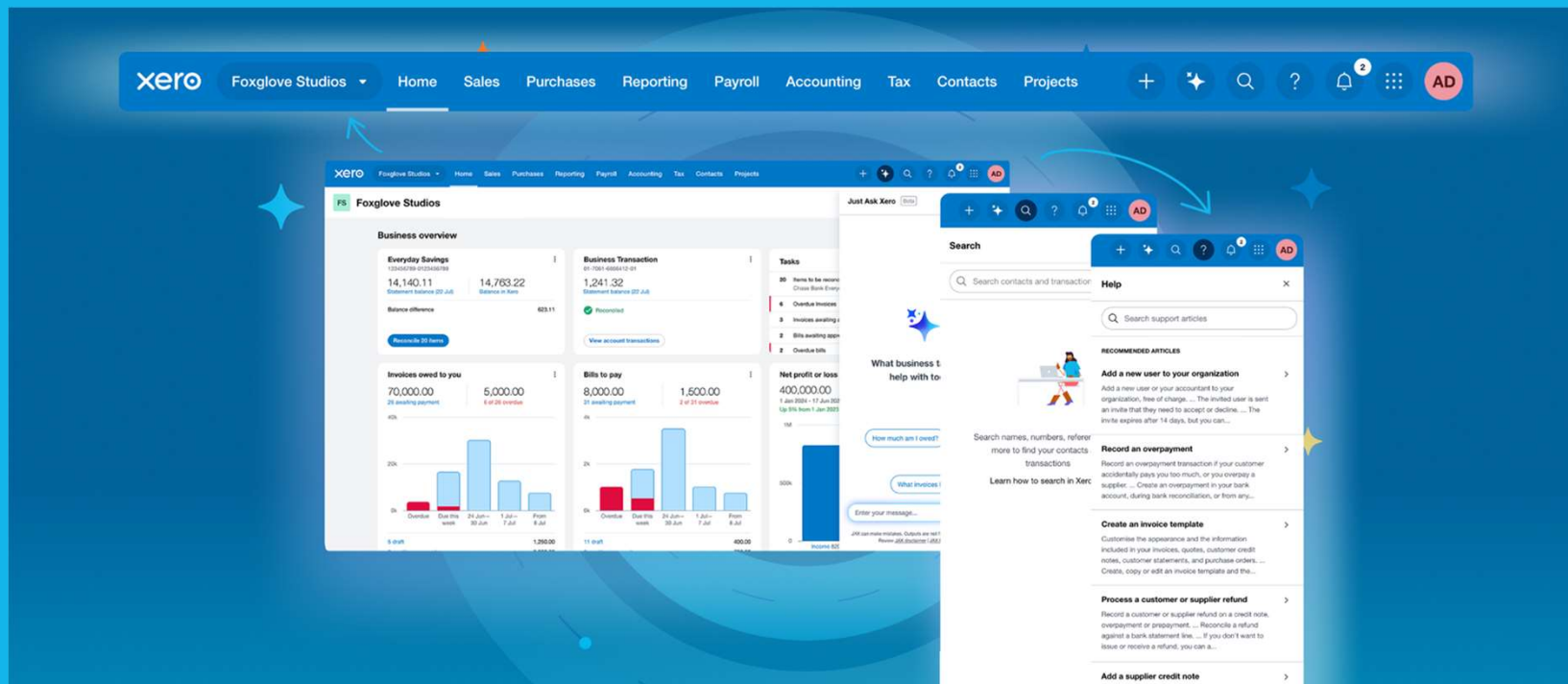
- Get access to financial data, right at your fingertips: JAX will give you instant access to your cashflow, P&L and balance sheet data.
- Get strategic decision support, powered by real-time actionable insights: JAX will help with strategic business decisions, like giving you ideas on how to improve cash flow or comparing loan interest rates across banks.
- Get a clearer view of finances, faster: Soon, JAX will work alongside you to automatically reconcile bank transactions where there's high confidence, giving you a reliable, up-to-date view of your finances sooner. You'll have full visibility over this automation on the new 'Reconciled' page, where you can see bank and accounting details together. You'll always be in control, with the ability to easily review or adjust any transaction JAX has reconciled for you.

External(np)

Date	Payee/reference	Description	Account code	Transaction Ref.	Tax rate	Spent	Received	Method	
2 Sep 2025	Ridgeway University	Ridgeway University	200 - Sales		GST on Income (10%)		6,187.50	Rule	
1 Sep 2025	Golden Gate Catering	Payment: Golden Gate...	420 - Entertainment	Portal proj.   MKT-789	GST on Expenses (10%)	234.56		Match	1
1 Sep 2025	Majestic Contracting	Majestic Contracting	200 - Sales	Yr ref H008-346   INV1014	GST on Income (10%)		450.00	Manual	
28 Aug 2025	Swanston Security	Swanston Security	453 - Office Expenses		GST on Expenses (10%)	15.00		Memory	
28 Aug 2025	Amazon	Amazon	453 - Office Expenses		GST on Expenses (10%)	29.80		Manual	
28 Aug 2025	ACL Conferences	ACL Conferences	493 - Travel - National		GST on Expenses (10%)	85.00		Manual	
25 Aug 2025	Xero	Payment: Xero	485 - Subscriptions	Monthly subscription	GST on Expenses (10%)	29.00		Match	1
25 Aug 2025	Hamilton Smith	Hamilton Smith	200 - Sales		GST on Income (10%)		541.25	Prediction	
20 Aug 2025	Melrose Parking	Payment: Melrose Parking	449 - Motor Vehicle Exp...	583036-97	GST on Expenses (10%)	148.50		Match	1
20 Aug 2025	OfficeMax	Payment: OfficeMax	453 - Office Expenses	SM0195-70135	GST on Expenses (10%)	34.10		Match	1
19 Aug 2025	Hoyt Productions Ltd	Payment: Hoyt Producti...	400 - Advertising	3203	GST on Expenses (10%)	5,953.75		Match	1
15 Aug 2025	Office Supplies Company	Office Supplies Company	429 - General Expenses	Fee	GST on Expenses (10%)	49.20		Rule	
15 Aug 2025	Check 1234	Payment: Carlton Functi...	310 - Cost of Goods Sold	99781	GST on Expenses (10%)	1,500.00		Match	1
12 Aug 2025	Berry Brew	Berry Brew	420 - Entertainment		GST Free Expenses (0%)	22.00		Manual	1
10 Aug 2025	24 Locks Pty Ltd	24 Locks	429 - General Expenses		GST on Expenses (10%)	69.50		Rule	
9 Aug 2025	Qantas	Reg 8018922	493 - Travel - National		GST on Expenses (10%)	234.00		Rule	
8 Aug 2025	Yarra Transport	Payment: Yarra Transport	200 - Sales		GST on Income (10%)		550.00	Prediction	
8 Aug 2025	Rex Media	Payment: Rex Media	200 - Sales	INV1023	GST on Income (10%)		550.00	Match	1
8 Aug 2025	Melbourne Mags	Melbourne Mags	461 - Printing & Stationery		GST on Expenses (10%)	21.90		Manual	

# A reimagined navigation and homepage experience

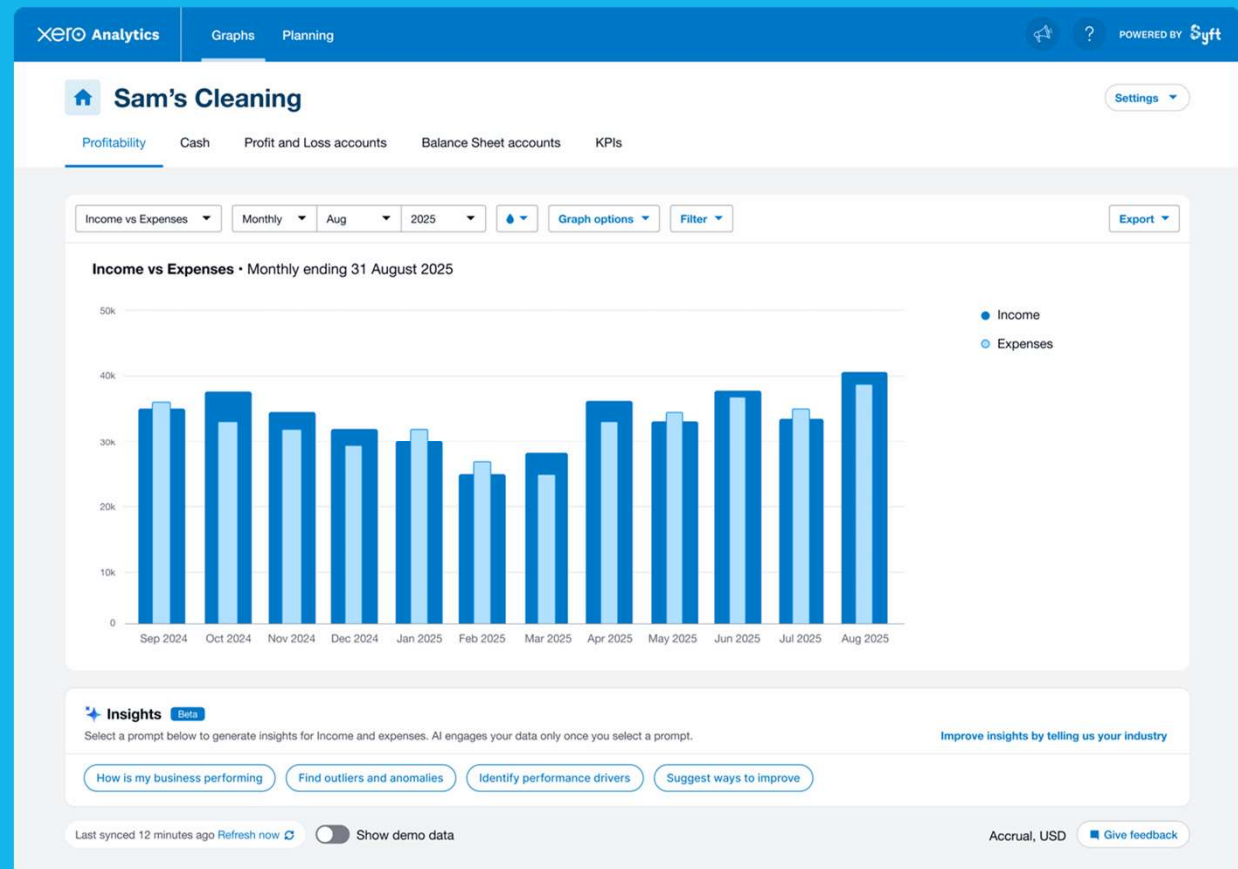
- Get a clearer view of business performance quickly with new widgets that highlight what needs your attention. The tailored view helps you stay focused on what matters most and take common actions directly from the page. For example, the new task list helps you prioritise and take prompt action on outstanding invoices and bills, and the enhanced banking widget shows where you have a balance difference and should complete a bank reconciliation
- Find what you're looking for more easily, thanks to the new navigation's simpler labels and logical groupings.



# Unlock actionable insights with Syft Analytics

- Quickly understand a client's financial health and easily communicate findings with Xero's new AI-powered insights.
- Get a complete picture of your client's business performance by importing external data, like website traffic, and visualising it alongside financial information.
- Easily monitor and advise on key metrics with advanced performance tracking and custom KPIs that provide a clear overall business health score.
- Unlock powerful new tools at no extra charge, as eligible Xero business plans in Australia, the US and the UK now have Analytics powered by Syft included.

External(np)

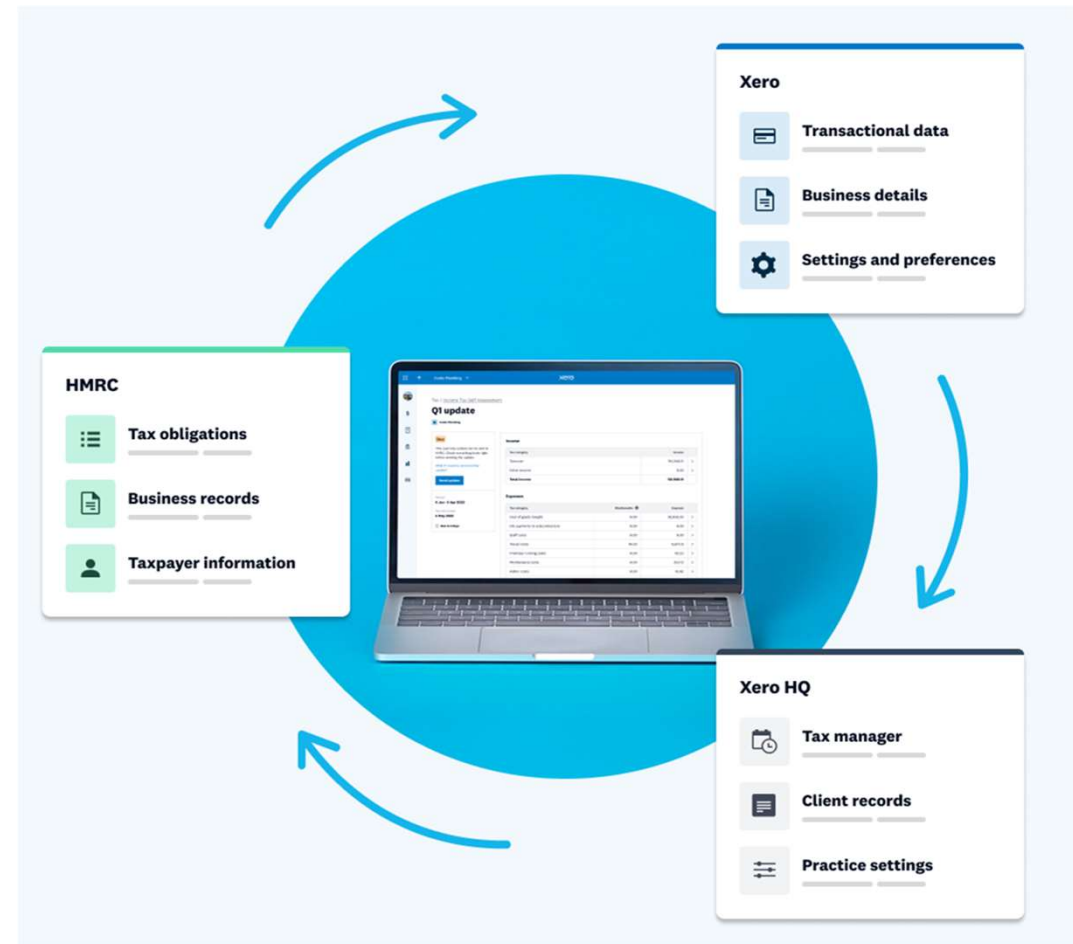




## Xero UK Update

# Xero MTD IT

A true End to End Solution



**Xero  
Roadshows are  
happening this  
month across  
the UK**



**Still to come...**

**Birmingham- 14/10**

**Bristol- 16/10**

**Exeter- 21/10**





*your* business  
supercharged



## Powering Practice Growth: Supplier Showcase



# SPECIALIST CYBER RISK MANAGEMENT FOR ACCOUNTANTS

**MITIGO**  
CYBERSECURITY

Working in partnership with:



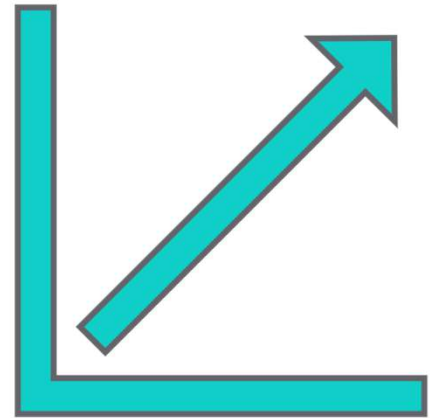
# What's the problem you're trying to solve?

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- 8.58 million cyber crimes in UK in 2024\* (up from 7.78 million in 2023)
- 64% of professional service sector breached or attacked
- £1.5million ave ransomware payment 2024\*\* 3-4 weeks downtime

\*UK Gov Cyber breach survey 2025

\*\* National Crime Agency



**MITIGO**

# A Sophisticated Criminal Ecosystem

## Stealers



- Steal credentials
- Sell to Access Brokers
- Can evade anti virus

## Initial Access Brokers



- Gain access to system
- Can evade anti virus
- Assess potential
- Sell the lead

## Affiliates



- Extend compromise
- Can evade anti virus
- Deliver ransomware
- Cover tracks

## Ransomware Gangs & RaaS



- Develop products
- Host leak sites
- Manage negotiations

# For a cyber attack to succeed, threat actors need two things:

---

## 1. Access to the Network - without access, they can't even start the attack. Common methods include:

- Phishing
  - Vishing
  - Compromised supply chain
- } Bypasses your technical controls – passwords/MFA/AV/Firewalls

## 2. Freedom to Act Once Inside

- Move laterally (pivot between systems)
  - Disable security controls and/or remain undetected
  - Escalate privileges (admin rights)
- } Exploitation of poor technical configuration

# The Real Reasons Firms Suffer Disastrous Breaches

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Thinking security is just about Technology – it is not

- Tech configuration is fundamental, but not enough
- Human error causes most breaches (clicking links, sharing credentials)
- Attackers use AI + social engineering + native-language vishing

Getting the wrong people to advise and audit

- **IT/MSP** must not mark their own homework – **not independent**
- Cyber Risk Management is a separate discipline
- MSP is a critical part of your supply chain - **you cannot get oversight from within**



**Independent Cyber Risk Assessments**

**Penetration Testing**

**Simulated Attacks**

**Governance**

**Staff Training**



**Independent Assurance**

**Operational Resilience**

**Regulatory Compliance**

**Peace of Mind**

**A free 60-minute cyber review**





# THANK YOU

[MITIGOGROUP.COM](https://MITIGOGROUP.COM)



## Powering Practice Growth: Supplier Showcase



# GJC

Charter Group

Gavin Jones

CEO, GJC Advisory





## In 10 Minutes You'll Get:

### Sharp Advisory Expansion

A clear way to expand advisory services without hiring a full corporate finance team.

### Three Plug-In Models

Proven partnership approaches that protect your existing client relationships.

### The Numbers

Real metrics on retention, revenue per client, and transaction value uplift.

### 90-Day Start Plan

Exactly how to begin implementation within 3 months.

Designed specifically for firms serving the sub-£10m EV SME segment.



# Why Now: Clients Want More Than Compliance



## Elevated Expectations

Business owners now expect board-level guidance on growth, funding, and exit strategies — not just year-end accounts



## Competitive Pressure

Competitors are actively circling with comprehensive 'advisory' bundles — don't risk losing the relationship you've built



## Trust Extension

You're already the trusted advisor for compliance — extend that trust into strategic outcomes and value creation

## Who We Are (in one slide)



Operator-led advisors: former CEOs, CFOs, MDs — we've run P&Ls and exited businesses

- **We translate corporate-grade strategy** into SME results that actually work in the real world.
- **We advise** — then co-deliver — under your firm's brand, protecting your client relationships whilst delivering exceptional outcomes.

### Our 5 offerings:

- Deliver or Co-Deliver Exit/Succession for SME's
- Help SME's Acquire companies as part of a growth strategy.
- Raise Equity
- Raise Debt (through advisory not brokering)
- Profit Improve.



## Three Ways to Partner With GJC

Pick one, or blend them. All white-label, relationship-safe.

01

### Academy Licensing

Best in class training delivered on-job, under your brand, whist fee earning.

02

### Shared Resourcing

Our transaction team steps in when you need expertise.

03

### Non-Executive Leadership/Profit Improvement

Fractional C-suite to drive strategy and governance.



## Model 1: Exit Academy Licensing

### Delivery-led Programmes

Exit and MBO/MBI Academies, delivered under your brand with full nose to tail support.

### Learn While You Deliver

Partners gain confidence and expertise rapidly through hands-on delivery

### Proven Results

Typical outcome: 15–20% advisory revenue uplift in year one

Through: Annual Licence Fee.

Leading to: Revenue Share on fee and success fees.

Perfect for activating opportunities with existing compliance clients who are ready for strategic advisory/attracting new clients with a transaction need.



## Model 2: Shared Resourcing



### Expert Transaction Support

Our experienced transaction team steps in when capacity or specialist expertise is tight, ensuring no opportunity is missed.

### Revenue-Share Alignment

Full confidentiality maintained whilst you keep the client relationship and benefit from shared economics.

### Comprehensive Coverage

- Exits and acquisitions
- Investor readiness programmes
- Funding rounds and debt advisory arrangements (we are not brokers)
- Post-deal integration support





## Model 3: Non-Executive Leadership



### Fractional Chair/NED

Experienced leadership to guide strategic decisions and provide governance oversight for growing SMEs



### Interim C-Suite

Temporary executive leadership during transitions, turnarounds, or major growth phases



### Strategic Roadmapping

Builds clear pathways toward future funding rounds, acquisitions, or exit opportunities

Ideal for growth challenges, turnarounds, and post-acquisition integration where experienced leadership makes the difference.



# How We De-Risk Advisory: Diagnostic-Diagnostic-First

1

## MAUS Diagnostic Review

Establishes a factual baseline using proven assessment tools, not guesswork or assumptions, delivers exit readiness report & high performance score, & adds another revenue stream.

2

## Data-Driven Priorities

Creates a clear value-creation plan based on objective analysis, not 'best-guess' advice.

3

## Repeatable IP

Builds methodology and measurable outcomes within your firm for long-term capability, as well as quality assurance and consistency.



# Your Clients, Especially Sub-£10m EV

## The Gap We Fill Together

This segment is underserved by traditional corporate finance houses who focus on larger deals. We specialise in making corporate-grade advisory accessible and effective for growing SMEs.

## Clear Strategic Pathways

- Raise equity or debt funding
- Buy or sell businesses
- Profit improvement programmes
- Leadership and governance development
- Sales and business development coaching.



## National Coverage, Regional Understanding

We combine national reach with deep regional market knowledge, ensuring your clients receive relevant, actionable advice.



## The Commercial Upside for Your Firm

£150k

Additional Revenue

Typical first-year additional advisory revenue per partner based on one cohort.

92%

Client Retention

Retention rate with strategic advisory services

3×

Fee Growth

Per-client fee growth combining compliance + advisory

24%

Revenue Increase

Average increase in per-client revenue (partners)

£4.5m

Transaction Value

Average transaction value we support

63%

Exit Planning Uplift

Retention uplift when exit planning is offered

## Proof Points & Bench Strength



### Trusted by Leading Firms

We're trusted by PE firms, law firms and UK SMEs across the country — all delivered seamlessly under your brand.

### Proven Experience

Our team consists of former CEOs, CFOs, and MDs with lived transaction experience, not just theoretical knowledge.

"42% advisory revenue growth in our first year working with GJC" —Neil Stevens, real-world partner outcome from TCBromhead.



# Relationship Protection



## White-Label Delivery

All services delivered under your brand — clients see you as the expert



## Full Confidentiality

Your client, your relationship — we operate behind the scenes



## Aligned Incentives

Revenue-share model ensures we succeed together



Building  
futures  
together

GJC Advisory





## Your First 90 Days With GJC - Post engagement.

1

Weeks 1–2

Full induction to all delivery, and marketing material. Identify 6–10 client candidates using our proven quick filters and assessment criteria.

2

Weeks 2–4

Run diagnostics with selected clients; prioritise value-creation opportunities.

3

Weeks 4–8

Launch 2–3 pilot engagements (academy or shared resourcing) to prove the model.

4

Weeks 8–12

Build evidence pack; review pipeline opportunities; create scale plan for growth.

# Let's Build Your Advisory Engine



## Start Small, Prove Value

Pilot with trusted clients — keep it focused, prove the value quickly

## Choose Your Model

Academy, Shared Resourcing, Non-Exec — or blend approaches to suit your firm

## Get In Touch Today

Email: [gavin@gjcadvisory.com](mailto:gavin@gjcadvisory.com) Web: [www.gjcadvisory.com](http://www.gjcadvisory.com) LinkedIn: @GJCAdvisory

# Thank You

Questions Welcome.



A circular portrait of Paul Richmond, a middle-aged man with short grey hair, wearing a light blue button-down shirt. The portrait is set against a white background and is framed by a thick teal and lime green border.

**Paul Richmond, Director, GroGroup**  
A renowned expert on leadership and people strategy, Paul Richmond brings a fresh perspective on how firms can adapt to the shifting expectations of today's workforce. With deep insight into HR transformation, he helps organisations align their people strategy with business goals in a rapidly changing landscape.



This keynote will explore why people, not just technology, remain the ultimate differentiator. He'll examine how firms can evolve their talent approach, from redefining career paths to attracting next-gen professionals and adapting to the impacts of AI on training and development. Packed with insights on mindset shifts, performance management, and bridging generational gaps, this session is essential for any firm looking to build a future-ready workforce.



# PEOPLE: THE KEY TO WINNING IN A TECH – DRIVEN WORLD

PAUL RICHMOND  
MD, THEGROGROUP.

**strategy**talent**results:**





# ***Hey you!***

***Would you like to  
Be an accountant?***

*Years more training  
for a qualification...*

*+ 10 years experience*

*then you can take on a pile of debt  
to own the business...*

*Whaddya say?*

**strategytalentresults:**



***Or film cats on  
TikTok...  
Passive income  
£3,000pcm...***



Do accountants really ever make a difference?

# The numbers are falling

There's no real  
sense of purpose...

It's lots of work  
for what?

ICAEW reports 33% drop  
in applications for  
contracts ('22-'23)

Lack of qualified  
applications

Skills shortages

Accountancy is booooooring...

*A long term career in  
one firm....?*



I think *that* train may have left the station...



# Our People

- **Baby Boomers and Gen X**

- Needed **certainty** as their parents had volatility
- Lived through fall of Berlin wall, invention of internet, accounting provided strong career path
- Aspired to status, **recognition** as being important individually in society, partner in local firm
- Focus, **strong work ethic**, commitment, challenge status quo

- **Millennials and Gen Z**

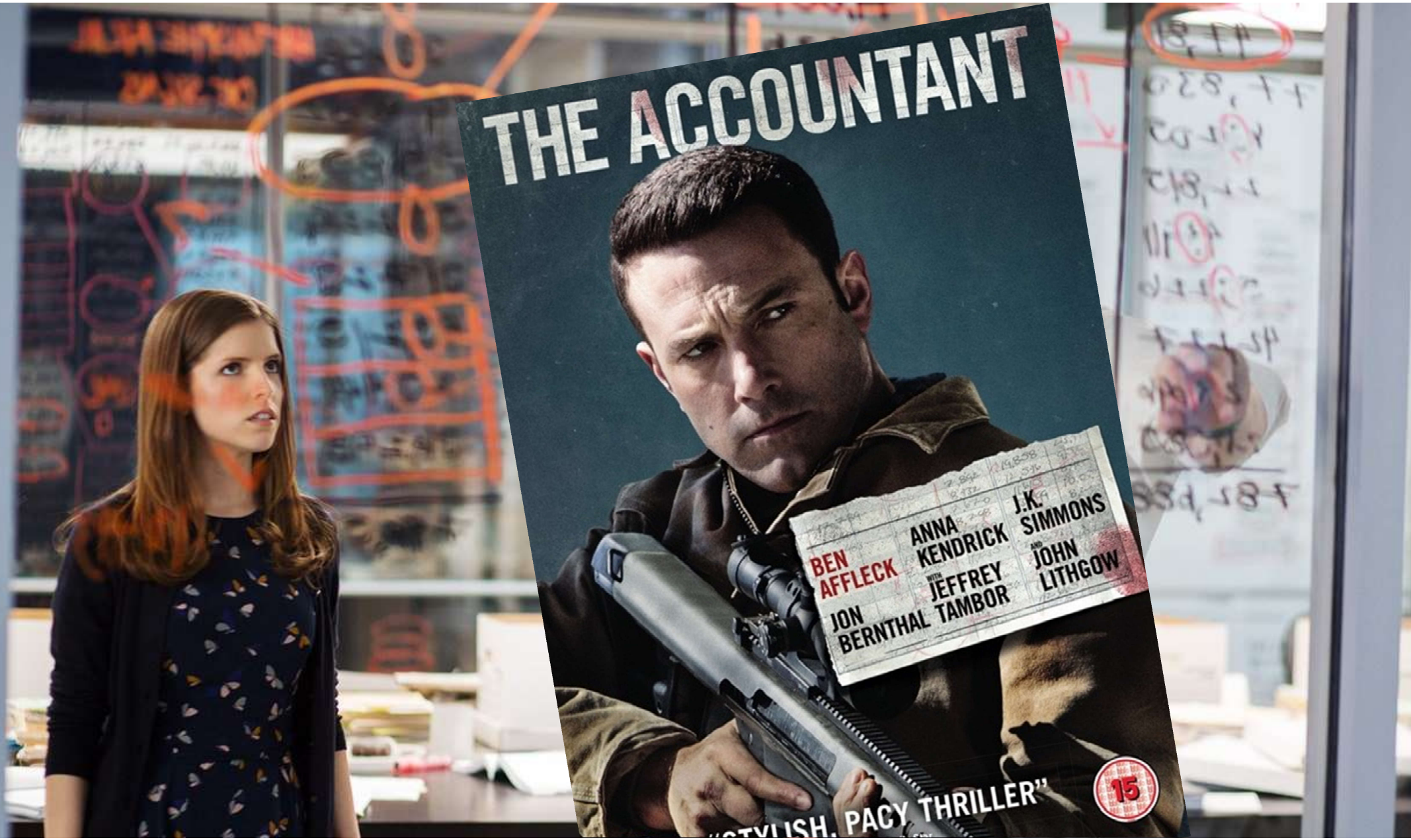
- Enjoy variety and **change** as parents have given them stability
- Concerned about **environmental** issues.
- Grown up in **turbulent** financial times, financial crisis
- Highly social online, travel, **'tribes'** form with common causes – have grown up through climate change and seek to **'make a difference'**

# THE ACCOUNTANT

**BEN AFFLECK**  
**ANNA KENDRICK**  
**WITH JEFFREY TAMBOR**  
**J.K. SIMMONS**  
**AND JOHN LITHGOW**

"STYLISH, PACY THRILLER"

15



# Is this your firm?



**strategy**talent**results:**



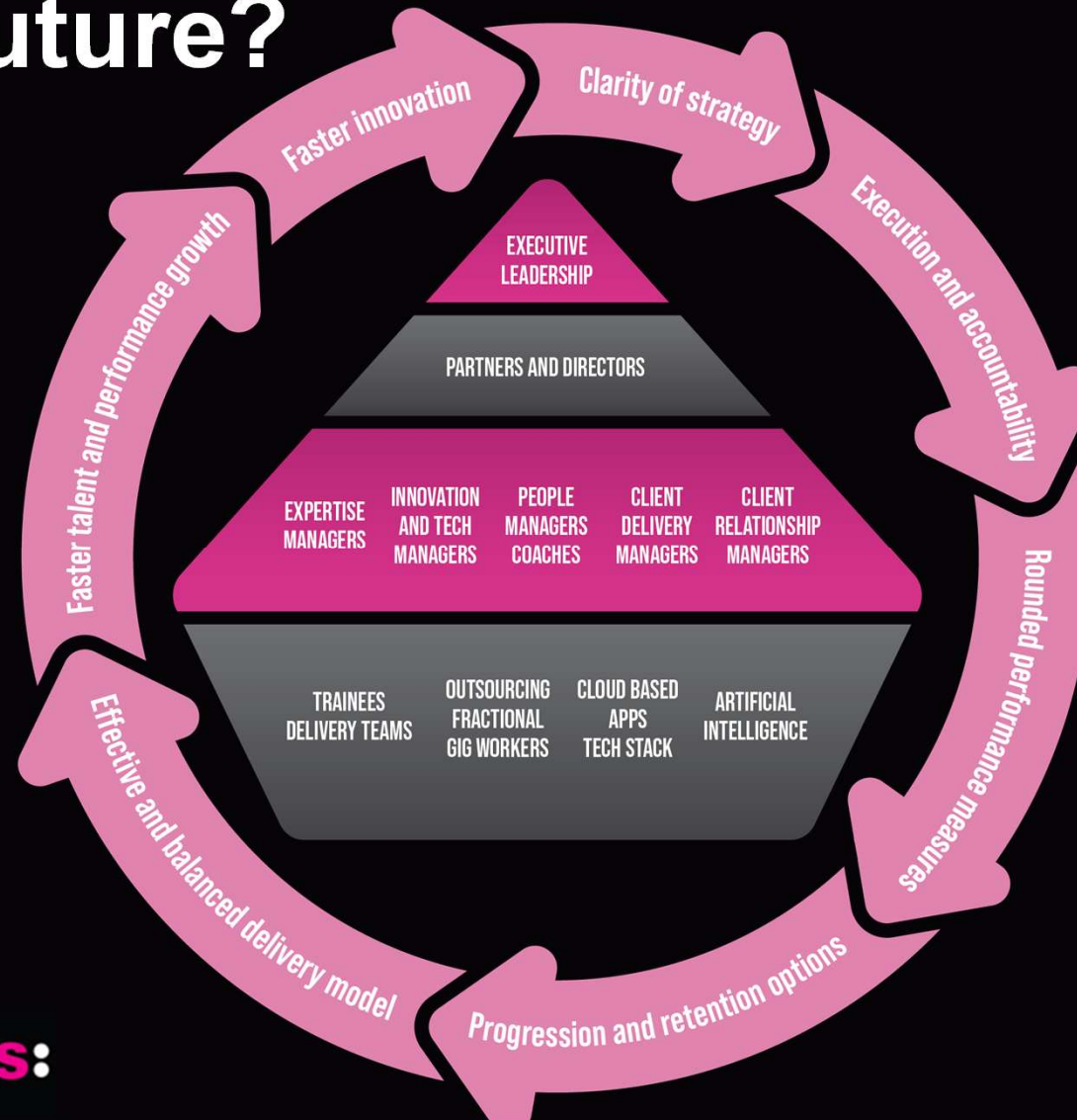
**Futurologists for 10mins ...**

**AI**

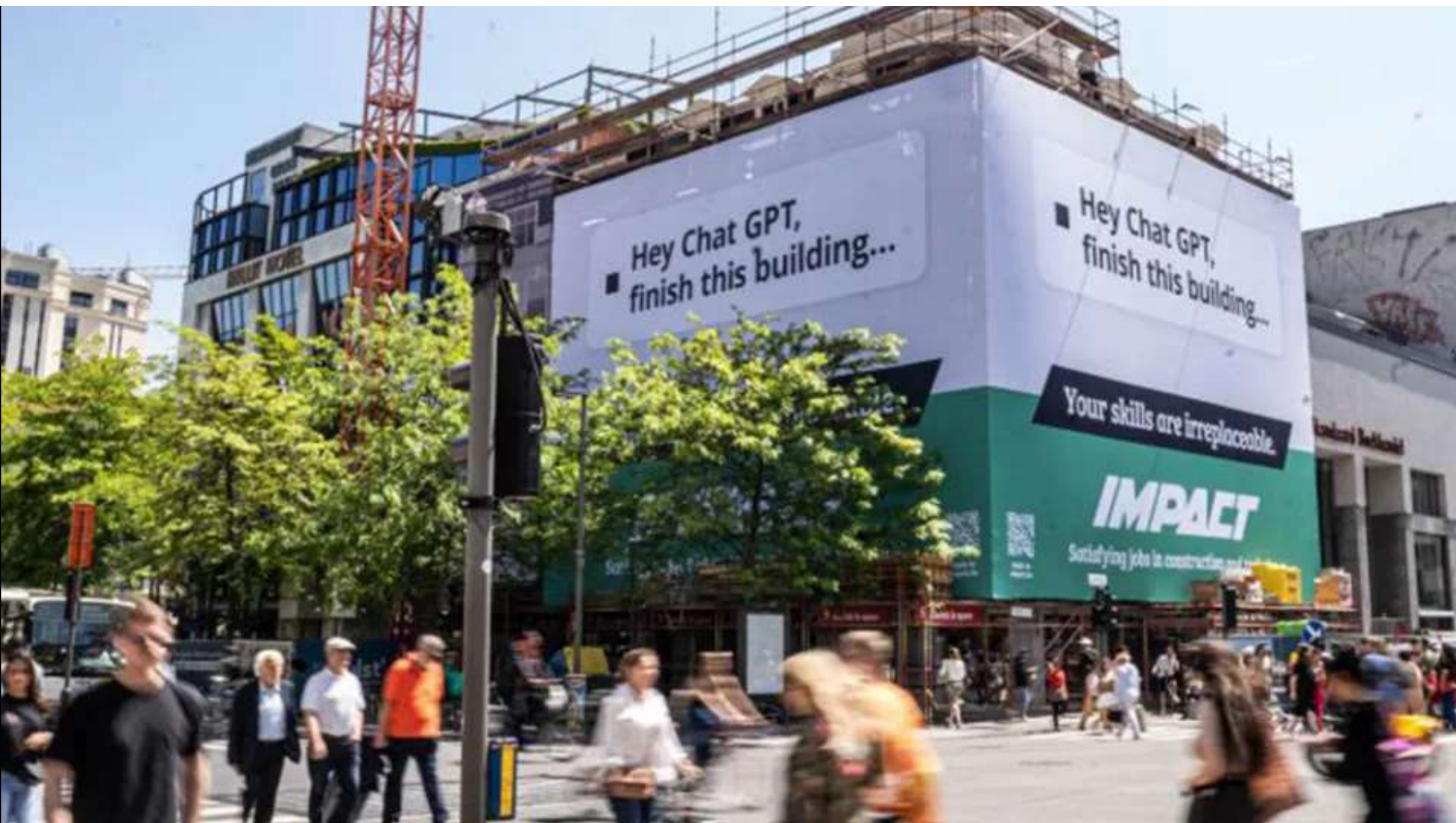
A large, white, stylized 'AI' text is centered over a night cityscape reflected in a glass sphere. The cityscape features numerous skyscrapers, including the Willis Tower, illuminated at night. The reflection is contained within a blue-tinted glass sphere that occupies the central portion of the image. The background is a blurred night cityscape with warm bokeh lights from buildings and streetlights.



# Firms in future?



***You are living today  
at the slowest pace of change  
you will ever know...***



# How will AI change our world?



Clients and their  
accounting systems



Our approach  
And our systems

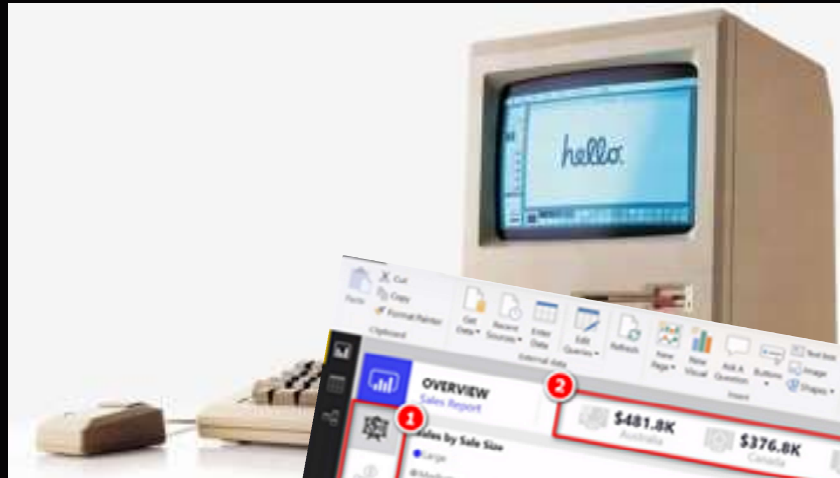


The wider  
economy

*We don't know for sure but...*



# Evolution



strategytalentresults:



# The Big Difference





# Retention Strategy

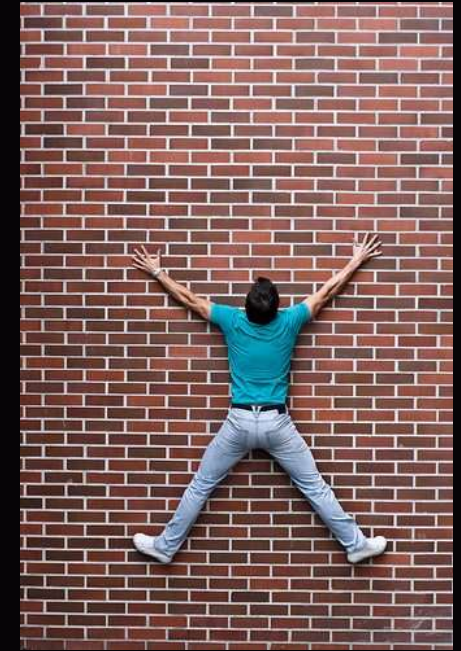
**We need  
to make people  
'sticky'**

**strategy**talent**results:**

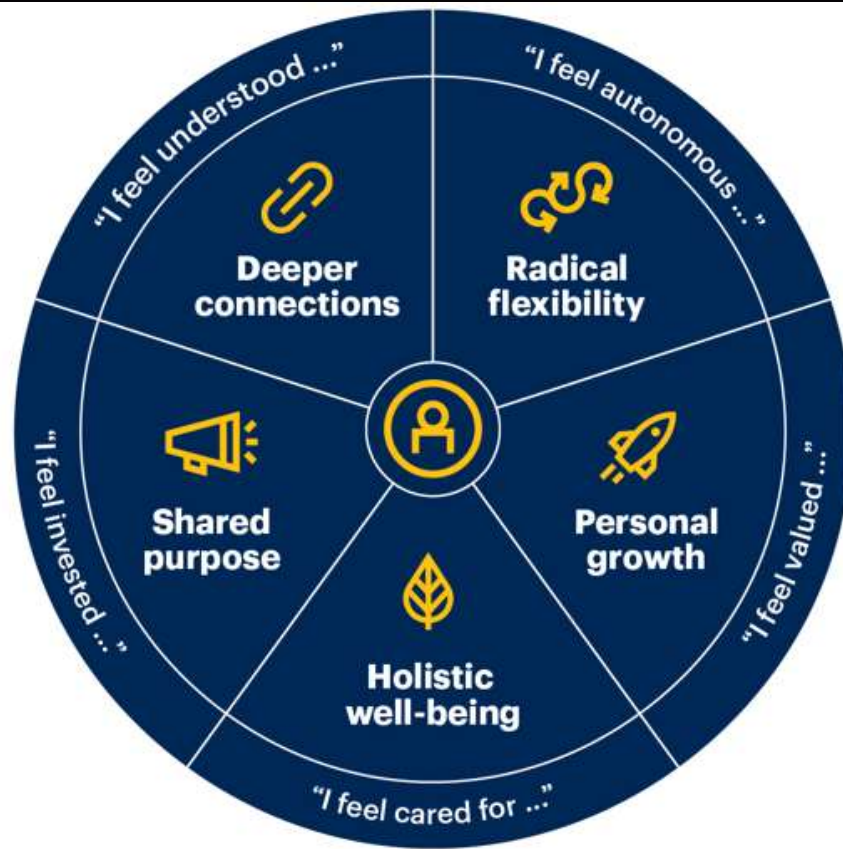


# Retention

- Who is in charge of retention?
- Not HR !!!
- Give one of the **partners** that responsibility
- Authority to drive change
- Consider what **action** you must take to encourage **trust** and **confidence** across the teams



# Creating a strong Employee Value Proposition (EVP)



Gartner research

5,000 employees  
Worldwide

Highlights FIVE  
key elements of a strong  
EVP



# How flexible?

- Part time
- Compression (40 hours in 4 days – 3 day weekend)
- Work remotely – overseas
- Secondments
- Don't recruit accountants...
  - Programmers, Data scientists, cyber experts
  - Investigators, HR, Marketing,

# Flexible Swedes...

- Tjänstledighet
- Allows employees to take 6 months to start a business
- Has been in law as a *right* for 20 years
- Does it work?
  - **Spotify** set up in 2006, the company floated on the New York Stock Exchange 2018 and has a market capitalisation of \$47 billion
  - **Skype**, acquired by Microsoft in 2011 for \$8.5billion
  - **Mojang** (Minecraft), acquired in 2014 for \$2.5billion



# Create Appeal...



Be an... Accountant?

**strategy**talent**results:**

Become an...

Entrepreneur?

Business coach?

Change agent?

What?



**Gro:**  
elo:



# So its not just for accounting or legal roles?

Data  
analyst

Tech  
Specialist

ESG  
Consultant

Coach  
Manager

Client  
Relationship  
Manager

Platform  
Manager

DEI  
Expert

Data  
Scientist

Transformation  
consultant

Cyber  
specialist

strategytalentresults:

Gro:

# Creative thinking

*If you were guaranteed  
success*

*Or had a magic wand*



# Slido

*What creative ways can we encourage Gen Y or Z to join our 'tribe' to support clients?*

*Be as creative as you can*

*What could they do for clients?*

*How might we manage their roles?*

# Creative techniques that appeal...



**strategy**talent**results:**

**Gro:**  
elo:

# Environment and creating a 'tribe'

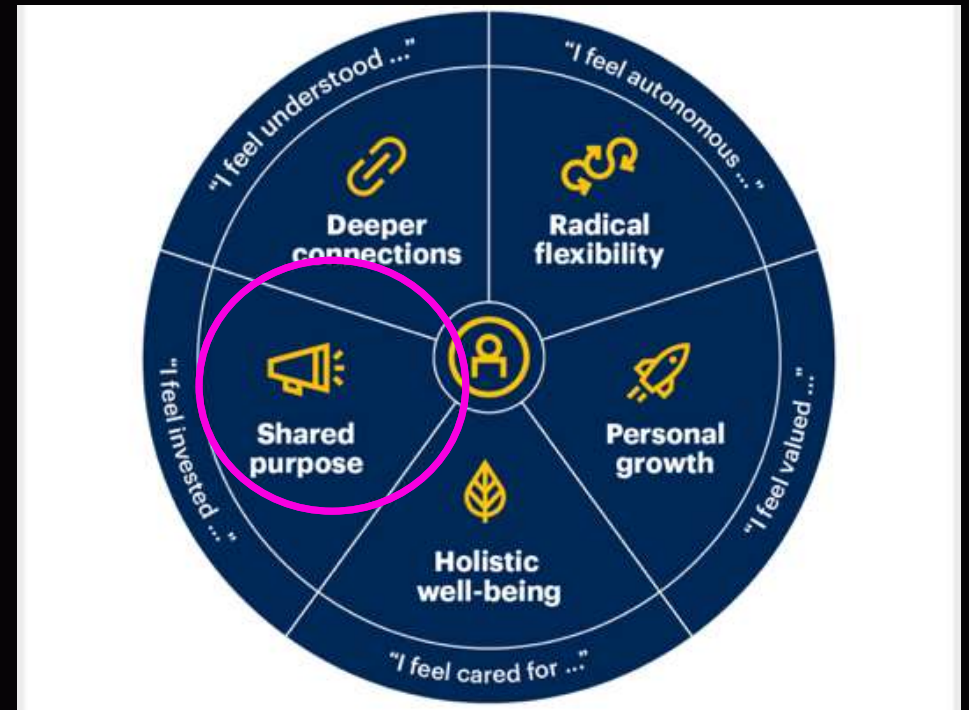


**strategy**talent**results:**

**Gro:**  
GLO:



***“What’s the point...?”***



**WHATS OUR SHARED PURPOSE**

# Purpose is key to job satisfaction

- **Purpose** is key to workplace satisfaction and well-being, according to nearly 9 in 10 Gen Zs (86%) and millennials (89%).
- Increasingly, these generations are willing **to turn down assignments and employers** based on their personal ethics or beliefs—50% Gen Zs and 43% of Millennials have rejected assignments or employers:
  - **Negative environmental impact**
  - **Non inclusive practices**
  - **Lack of mental health support**

***“We have a great ESG policy...”***



***“We have a great ESG policy...”***

***“...- AND THIS IS WHAT WE ARE DOING...”***

- As an employer you need to be able to demonstrate exactly what you do for your local community or the environment
- One day a year to pursue a community project
- Office commits to charity work in the community
- Create ESG teams focused on environmental concerns
- Get the junior teams involved, see what ideas they come up with
- Be prepared for candidates to ask – *“and what do you do personally (as a leader of this business...)”*



# Evolution



**strategy**talent**results:**



# A different way of supporting clients...

- *Plan* for a 3-5 year churn in staff
- Focus on their development
- Demonstrate the *variety* in a career
- Know that clients will do most of the work themselves
- Be prepared to explain your AI/Tech 'runway' to joiners
- Let them play – safely!
- Get *them* to come up with ideas - 'Shadow boards'
- AI will train them in future on what they miss as juniors

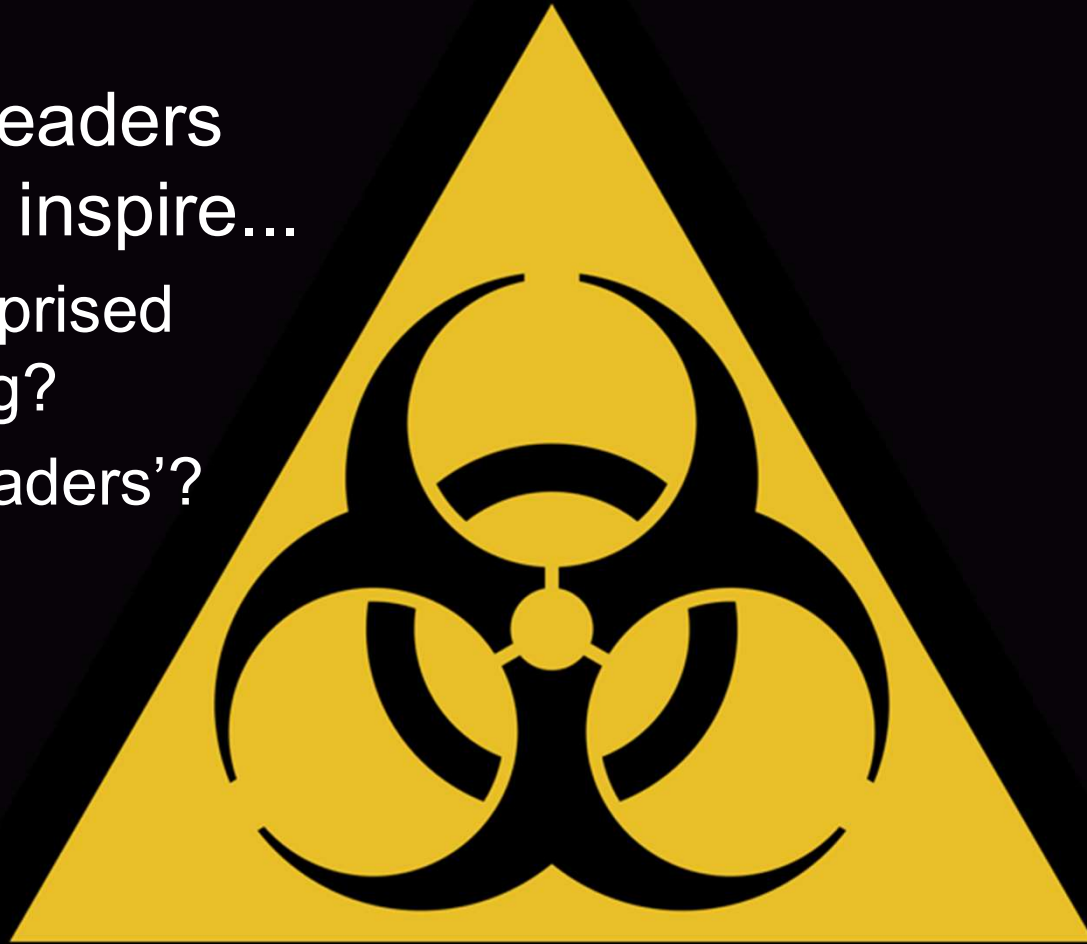
**strategytalentresults:**



**Take action #3 things...**

# 1 Do you shelter 'toxic' leaders?

- If you don't have leaders who motivate and inspire...
  - Are you really surprised people are leaving?
  - Are they really 'leaders'?



## 2 Do benefits align to employee priorities?

- It's not about entertainment, or parking, or perks
- 45% of survey respondents cite childcare as their single biggest concern
- How can you help them?



### 3 How do you provide variety, development, change?



**strategy**talent**results:**

**Gro:**  
elo:



**It can feel tough**



# Thank you !



@Paul Richmond  
@thegrogroup

Paul@thegrogroup.com

[www.thegrogroup.com](http://www.thegrogroup.com)



**strategy**talent**results:**

**Gro:**



**Callum Macrae, Marketing Director,  
JE Consulting**

A leading voice in brand strategy and professional services marketing. As Marketing Director at JE Consulting, he helps firms sharpen their employer brand, attract top talent, and build compelling narratives that resonate with the next generation.



In this session, Callum unpacks why the talent pipeline isn't broken, but firm messaging often is. He'll highlight what top-performing firms are doing differently, how to realign internal culture with external branding, and the changes you need to make to truly stand out as an employer of choice. If you want to attract and retain top talent while ensuring consistency across your firm, don't miss this session.





# THE CULTURE CODE

[je-consulting.co.uk](http://je-consulting.co.uk)

## A bit about me



### Callum Macrae

#### Credentials:

- 16 years in strategic marketing.
- Accountancy Marketing Lead at IRIS Software Group.
- Currently Marketing Director at JE Consulting.



**What if there isn't a  
talent shortage...  
just a shortage  
of appeal?**

**CONFIDENTIAL**

Intel

**40%**

of practices describe  
the talent shortage  
impact as “very  
significant / severe”.

*Source: 2025 Talent Index*

**74%**

of firms cannot onboard  
more client work  
because they lack  
skilled staff capacity.

*Source: International Accounting Bulletin*

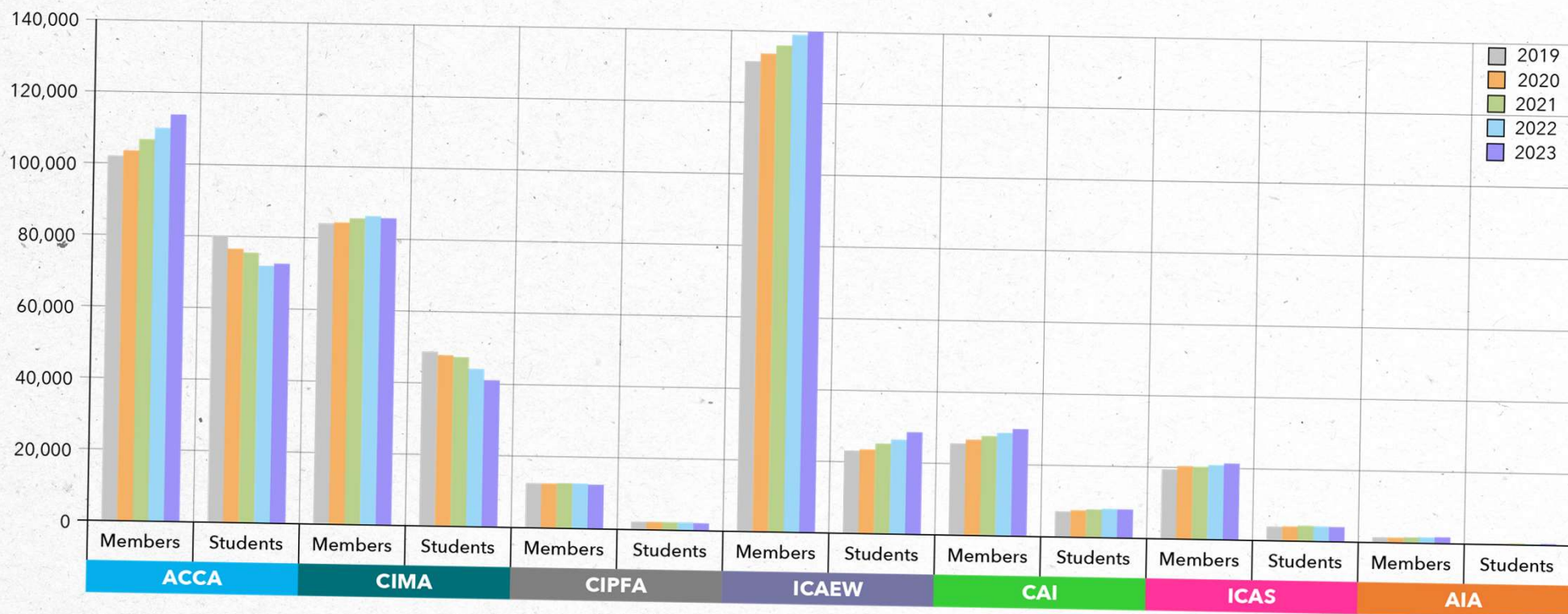


## Intel

40% firms flagging pay rates and the overall remuneration package as a significant issue when hiring.

The report reveals the most difficult jobs to fill are assistant manager and manager roles with 70% of firms saying this was a problem. Next came senior manager jobs, with 50% putting this in their top three challenges. Only 15% of firms flagged partner recruitment as their biggest challenge

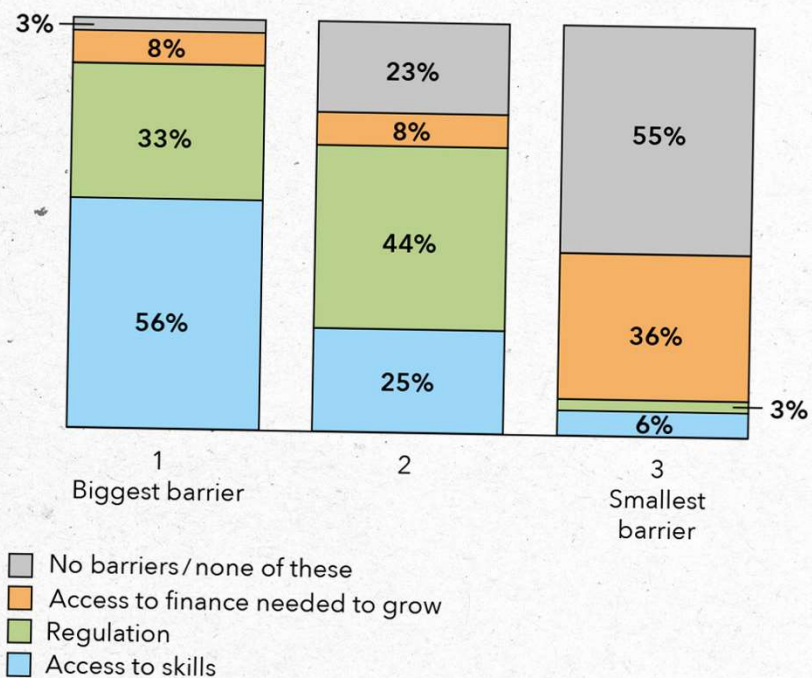
# Intel



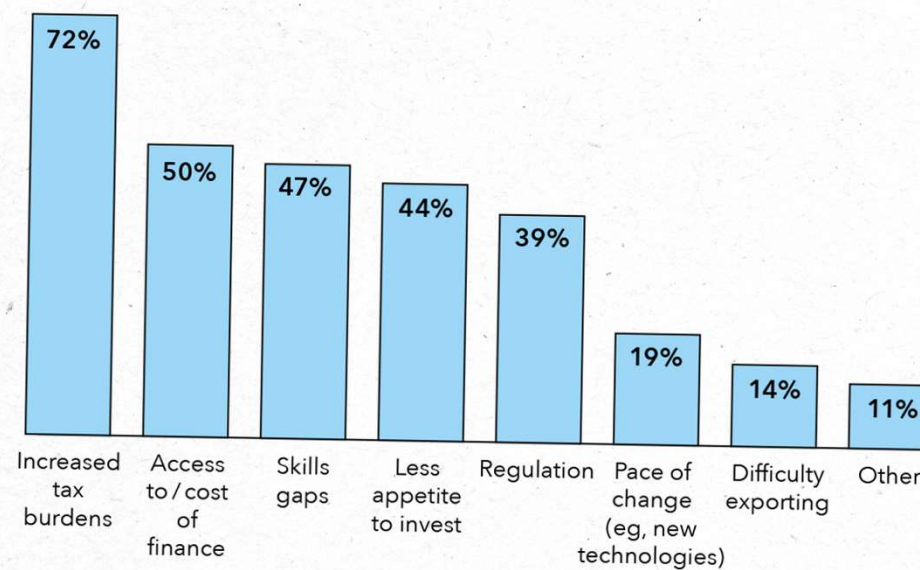
Source: Financial Report Council



## 1.2: BARRIERS TO GROWTH FOR FIRMS



## 1.3: TOP THREE BARRIERS TO GROWTH FOR CLIENTS



Source: ICAEW



Intel

**63%**

said their work environment  
(which includes culture,  
expectations, support)  
contributed to feelings of  
burnout in the past year.

Source: CABA

**49%**

of accountants surveyed  
have changed their jobs in  
the past two years.

Source: Sellick Partnership Survey



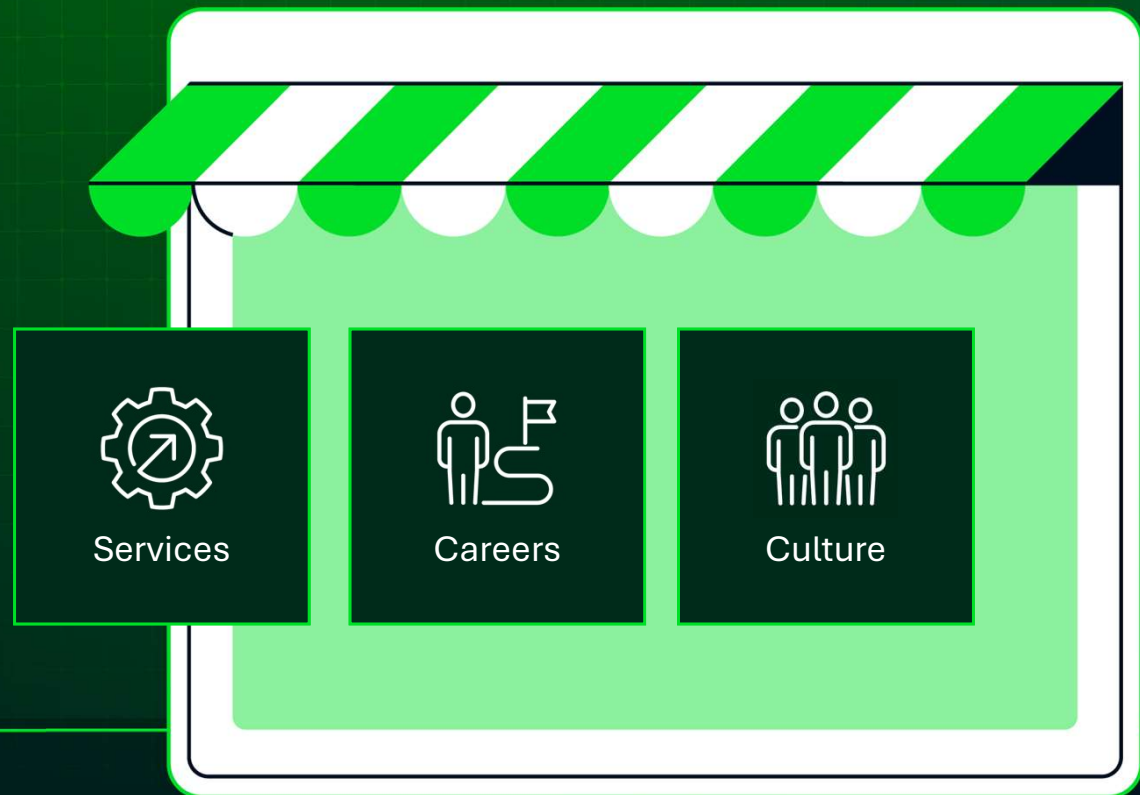
The background of the slide is a dark green field filled with a dense, vertical stream of white and light green binary digits (0s and 1s), reminiscent of the 'Matrix' digital rain effect. The digits appear to be falling from the top, creating a sense of motion and data flow.

**“So... what are you  
actually doing to show  
people what it’s like to  
work at your firm?”**

# **You're not just competing for clients. You're competing for talent.**

What makes your firm  
more appealing than  
the one they already  
work at?

Why your website  
is more than just a  
digital shopfront.



## Who's actually marketing their culture?

- How many of you have a careers page with staff videos or quotes from your team, in their own words, about why they love working at your firm?
- How many of you regularly post on LinkedIn or Instagram about your internal culture?
- How many of you have asked your own staff what makes your firm different and then used that feedback in your job adverts or website?



Intel

***“We’re a great place to work”  
means nothing if no one can see it.***

Use staff video clips on your website and social media

**Why?**

80% of Gen Z and Millennials  
say they use video to learn  
about a company’s culture  
before applying

*Source: LinkedIn/YouGov survey*

Video builds trust:  
employees are 3x more  
credible than CEOs when  
talking about work culture

*Source: Edelman Trust Barometer*

**Intel**

**65%**

**of job seekers  
check company  
websites**

Source: LinkedIn

**67%**

**visit career  
pages**

Source: LinkedIn



Intel

## **So what should they find?**

- Real People, Not Stock Photos
- Your Values
- Career Journeys, Not Just Vacancies
- Hybrid Working & Perks
- Day in the Life Content





Why values  
matter more  
than ever



**77%**

of candidates say  
they consider a  
company's culture  
before applying.

*Source: Glassdoor*

**75%**

of job seekers research  
a company's reputation  
and values before  
applying.

*Source: LinkedIn*

New data from Great Place To Work® reveals three experiences that are highly correlated with employees wanting to stay with their company long-term:

- **2.7x more likely to stay** when they say their work is meaningful
- **2.2x more likely to stay** when they report being proud of where they work
- **1.7x more likely to stay** when they say their workplace is fun

**Intel**

## **No values, no voice**

**They're asking:**

- 'What does this place stand for?'
- 'Will I belong here?'
- 'Is this just another job or somewhere I can grow?'



Intel

## No values, no voice



- ☐ Have we involved staff in shaping our values?
- ☐ Can our staff name them and explain them?
- ☐ Do our values show up in how we hire, promote and lead?
- ☐ Are our values visible on our careers page and socials?



# People don't join firms. *They join people.*

1

Celebrate  
new joiners,  
promotions,  
anniversaries.

2

Encourage  
staff to post on  
LinkedIn and  
tag the firm.

3

Don't just say  
there's a ladder -  
show people who's  
climbed it.

**You say it's a cost. *I say it's the cost of doing nothing.***

If **40%** of firms say the talent shortage is very significant or severe...

If **74%** are turning down work because they don't have the people...

*Then why isn't this your #1 investment priority?*

You wouldn't ignore a sales pipeline problem. You wouldn't ignore a compliance issue.

But when it comes to talent? We call marketing a "nice-to-have." We treat culture as a side project.

# **The firms who win the talent war don't treat marketing like a cost.**

They see it for what it is:

**An investment in people...**

**In attraction...**

**In retention.**



If your employer  
brand was a dating  
profile, would anyone  
swipe right?

Would **YOU** apply  
to your own firm?



# Culture pays for itself... literally

**56%**

of job seekers say a company's employer brand is more important than salary.

*Source: Workplace Trends*

**43%**

decrease in cost-per-hire is seen by companies that actively manage their employer brand.

*Source: LinkedIn*

Your competitors are  
marketing their culture.

They're attracting the talent.

They're growing faster.

***What are you doing about it?***

# How to complete your mission

## Positioning JE Consulting

Works with 150+ professional firms

25+ years' experience

Full-service marketing agency







Please scan to find  
out more about how  
we can help you







WAKE, SHAKE & INNOVATE





**Alan Vallance, CEO, ICAEW**  
As Chief Executive of ICAEW, Alan Vallance is leading the charge on transformation within the profession.

With a background in strategy, innovation, and leadership, Alan brings a future-focused view on the changing role of firms in the UK economy.



This keynote will explore the critical market themes reshaping the profession, from shifting client expectations and tech disruption to consolidation trends and ICAEW's evolving priorities. Alan will offer a forward-looking vision for how firms can stay relevant, resilient, and respected in the years ahead.



# **The Evolution of the Profession**

**Alan Vallance**

**Chief Executive, ICAEW**





# ICAEW Updates

# Key metrics



Strong but reduced member  
and student growth



Growth in faculty and  
community membership



Remain financially resilient



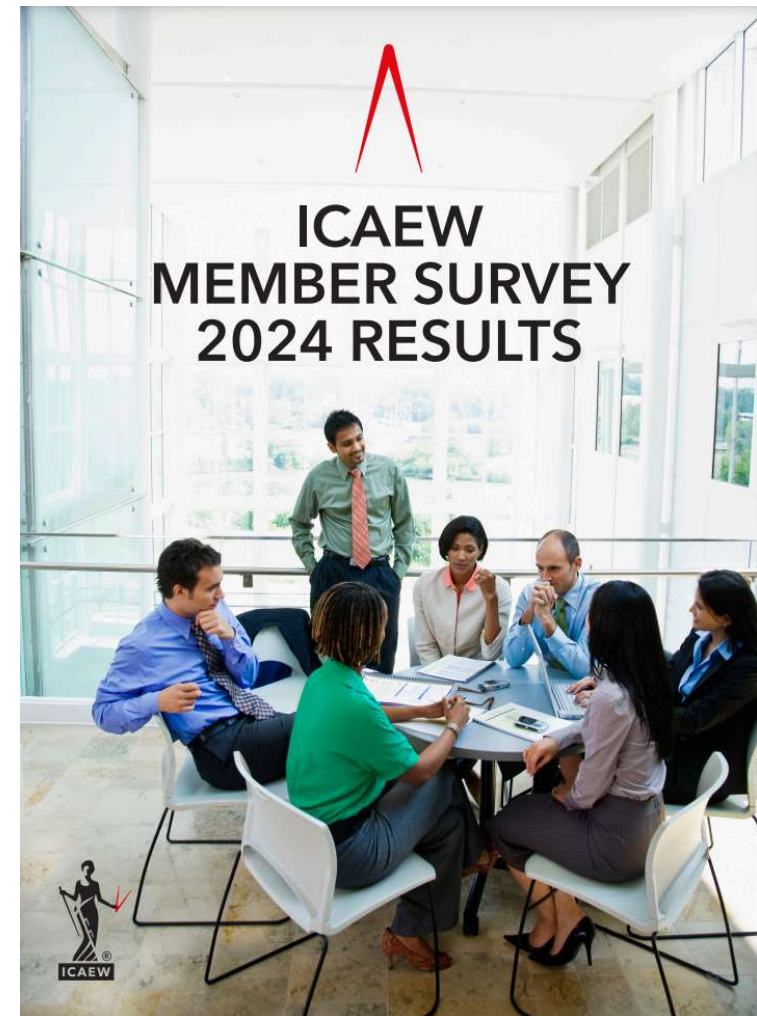
# DIRECTION 2030

SHAPING OUR FUTURE

# ICAEW Member Survey

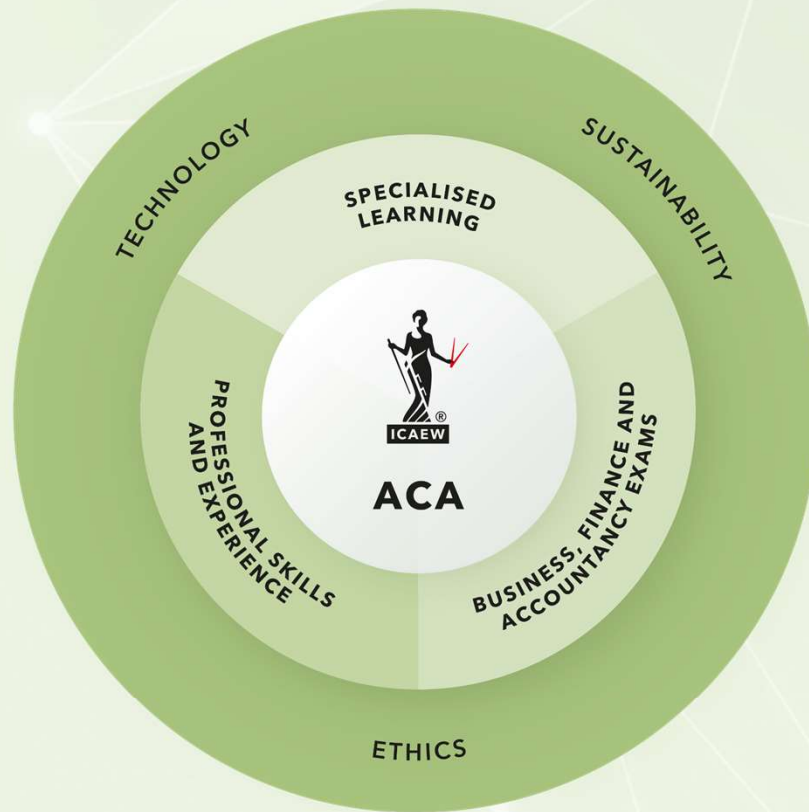
**\*\*More interaction = greater satisfaction\*\***

- **Prestige** and **status** of the ACA are the most valued benefits of membership
- Members look to ICAEW for **professional development** and support
- **Technology**, automation and generative AI are the biggest challenges and opportunities for the profession
- Desire for improvements in the relevance of our **communications**
- Want mechanisms for **feedback** on the issues of the day





# Next Generation ACA



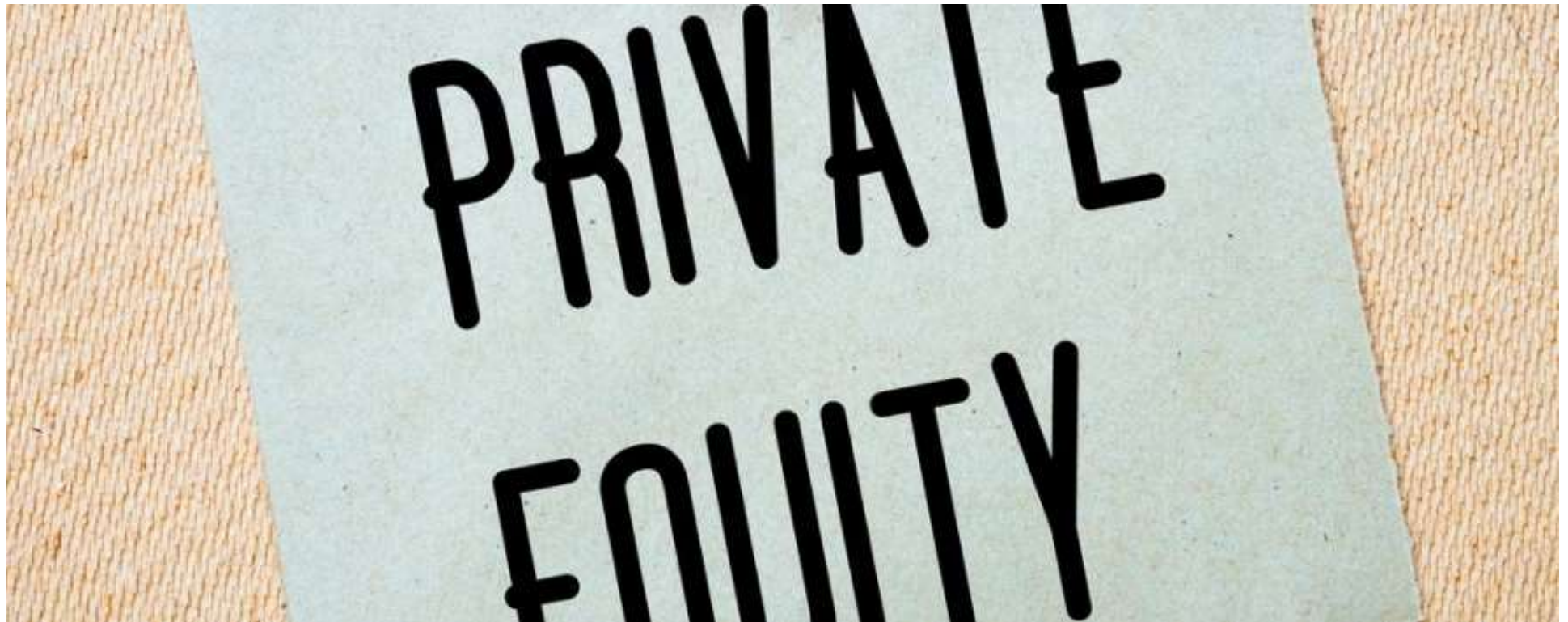
## The most advanced business, finance and accountancy qualification in the world

- Developed with the profession, for the profession
- Agile, flexible and relevant
- Dynamic and supportive syllabus
- Develops future-proof skills
- Unrivalled personalisation
- Builds digital fluency
- Trusted pedigree around the world



# **What's Keeping Us Awake**

# Third Party Capital



# Budget 2026

BACKING BUSINESS-LED GROWTH

## How the government can enable growth

Drawing on members expertise and our research into business confidence, ICAEW offers policymakers advice on how to tackle the barriers to growth.

[Barriers to growth and ICAEW solutions](#)





# Apprenticeships

To 31 Dec 2025

31 Dec  
2025

Employer options from 1 Jan 2026

Students of any age who **start a Level 4 or Level 7 apprenticeship by 31 December 2025** will continue to receive funding for the duration of their apprenticeship.

## Employer considerations

1. Track eligibility for existing staff; such as those on probation or AAT Level 3 or Level 4
2. Recruit and register new starters before 1 Jan 2026
3. Appraise training routes from January 2026

1. **Level 7** for students aged 16-21 (incl.)
2. **Level 4** for students of any age **without a relevant degree or equivalent Level 4**
3. **Commercially fund the ~~ACA~~** outside of apprenticeship
4. **A combination of the above**

## Employer considerations

Review recruitment and training policy.



# Impact of AI



# GenAI Accelerator Programme

Unlock GenAI's power to revolutionise how you work in finance and accounting, positioning yourself ahead of the profession's transformation.

**Explore today**



[icaew.com/genaiaccelerator](https://icaew.com/genaiaccelerator)



# Sustainability Reporting and Assurance





# ICAEW Sustainability Accelerator Programme

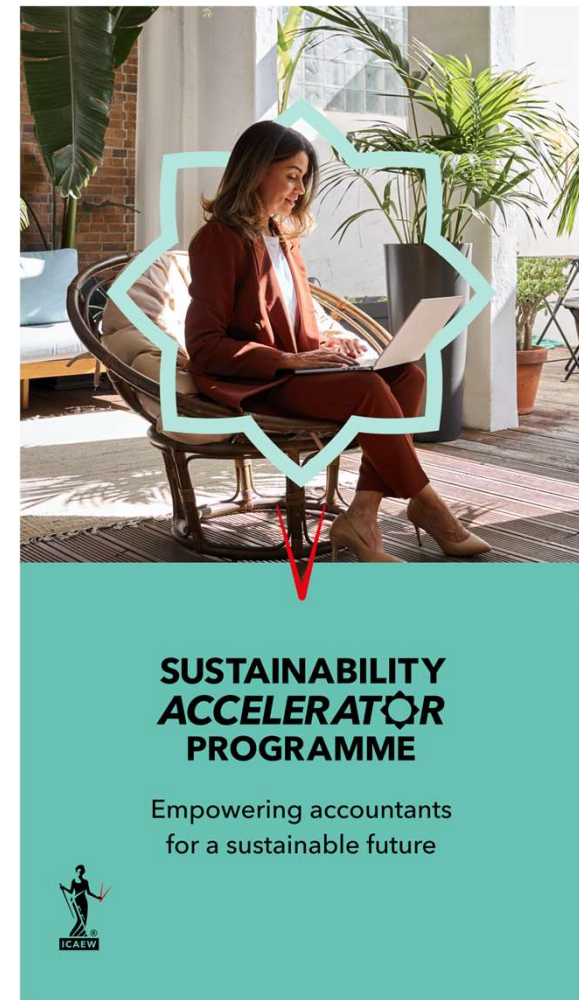
**ICAEW's Sustainability Accelerator Programme is free to ICAEW members.**

Here's what you can expect from the programme:

- Unit 1. Introduction to Sustainability (*includes the updated ICAEW Sustainability Certificate for 2025*).
- Unit 2. Building the Business Case for Sustainability
- Unit 3. Sustainability Reporting and Decision-Making
- Unit 4. Sustainability Strategy and Risk Management
- Unit 5. Sustainability Assurance

## **For your diary**

- ICAEW Sustainability Summit 3-4 November 2025



## **SUSTAINABILITY ACCELERATOR PROGRAMME**

Empowering accountants  
for a sustainable future



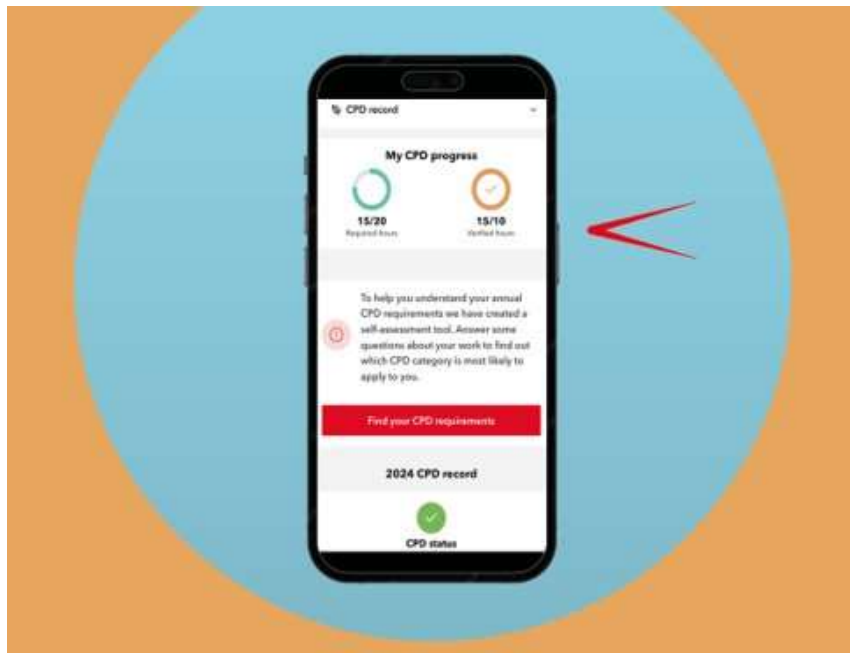
# Regulation





# **Support for you and your firm**

# Helping you with CPD



- **CPD identification tool** helps members determine their CPD requirements based on their professional role.
- **An online CPD record** enabling members to document their CPD requirements.
- **The ‘AddCPD’ verification tool** lets members mark ICAEW web content (articles, videos) as verifiable CPD.



# Practice Resources Hub

- From technical content and guidance, latest news, events and more, find the content you need with ease
- **Explore today**  
<https://www.icaew.com/practice>

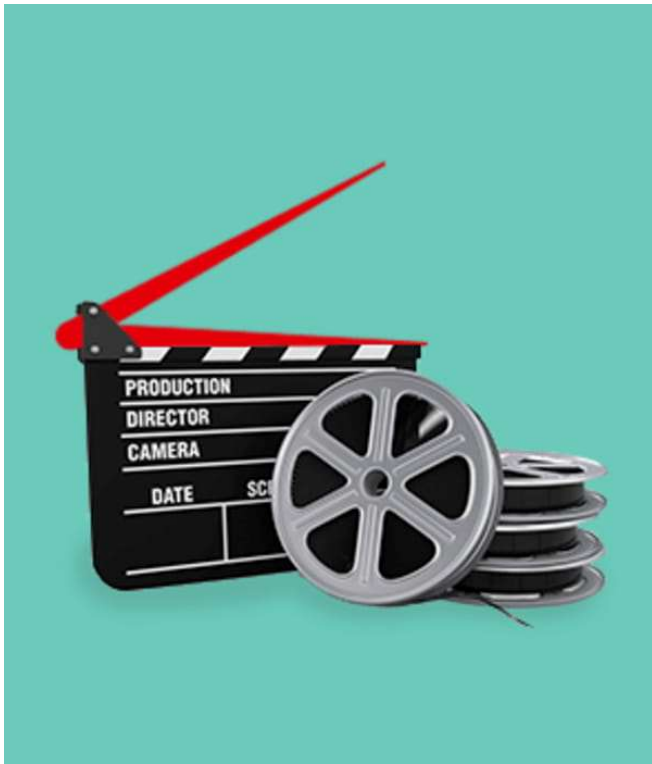


# Bloomsbury Accounting and Tax Service



- Free access for ICAEW member firms
- 80 leading accounting and tax resources
- Re-launched platform
- [icaew.com/bloomsbury](https://icaew.com/bloomsbury)

# ICAEW Training Film: 'Crossing the Line'



- Available to all ICAEW-registered audit firms
- Focus on professional conduct, workplace challenges and core audit themes



[icaew.com](https://www.icaew.com)



**Derek Southall, Hyperscale**

One of the most respected names in innovation and digital strategy, Derek Southall runs an independent advisory and implementation consultancy. With extensive experience helping professional services firms navigate complex digital landscapes, they specialise in innovation, operational excellence, and strategic tech planning.



In this eye-opening session, Derek will tackle the evolving tech minefield that firms are facing today. From the overwhelming promise of AI to the practical roadblocks such as adoption resistance and tech knowledge gaps, they will offer pragmatic guidance on how mid-tier firms can architect tech stacks that truly support growth and client service. Expect insight into designing for commoditisation, unlocking productivity, and leading successful IT change while managing risks and fostering a culture of adoption.



# The CharterGroup Managing IT and IT Functions – Some Lessons from the Field

**Strictly Private & Confidential**

10 October 2025

**Derek Southall, Founder Hyperscale Group Limited**

**Hyperscale**  
Group Limited

## Who am I?



Founder & CEO  
Hyperscale Group

Lawyer  
Equity Partner  
Technologist  
Head of  
Innovation  
Ops Director  
Compliance Lead  
KM Lead  
Strategy  
Sales and Product  
Launch



Derek Southall's Business Card

# Agenda

1. Art not Science
2. You
3. People
4. Spend
5. Suppliers and Contracts
6. Outsourcing
7. AI
8. Hardware
9. Cyber and Business Continuity
10. Closing Thoughts

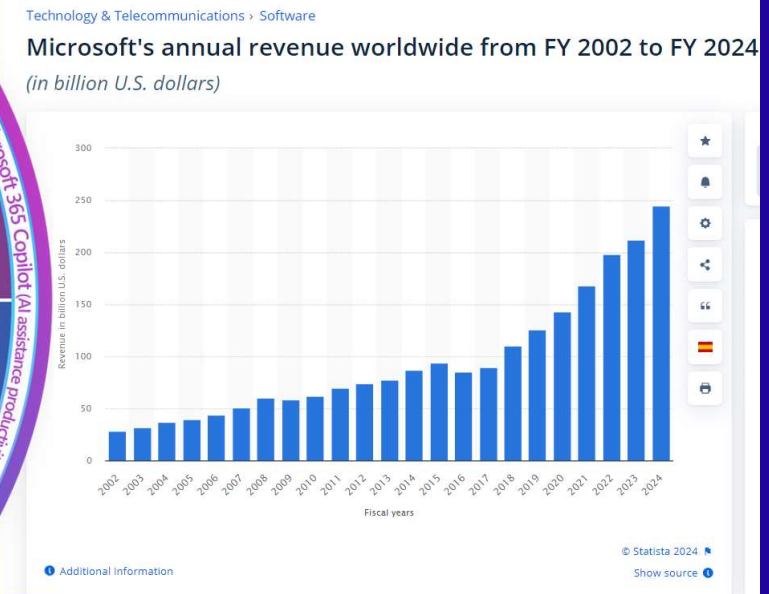
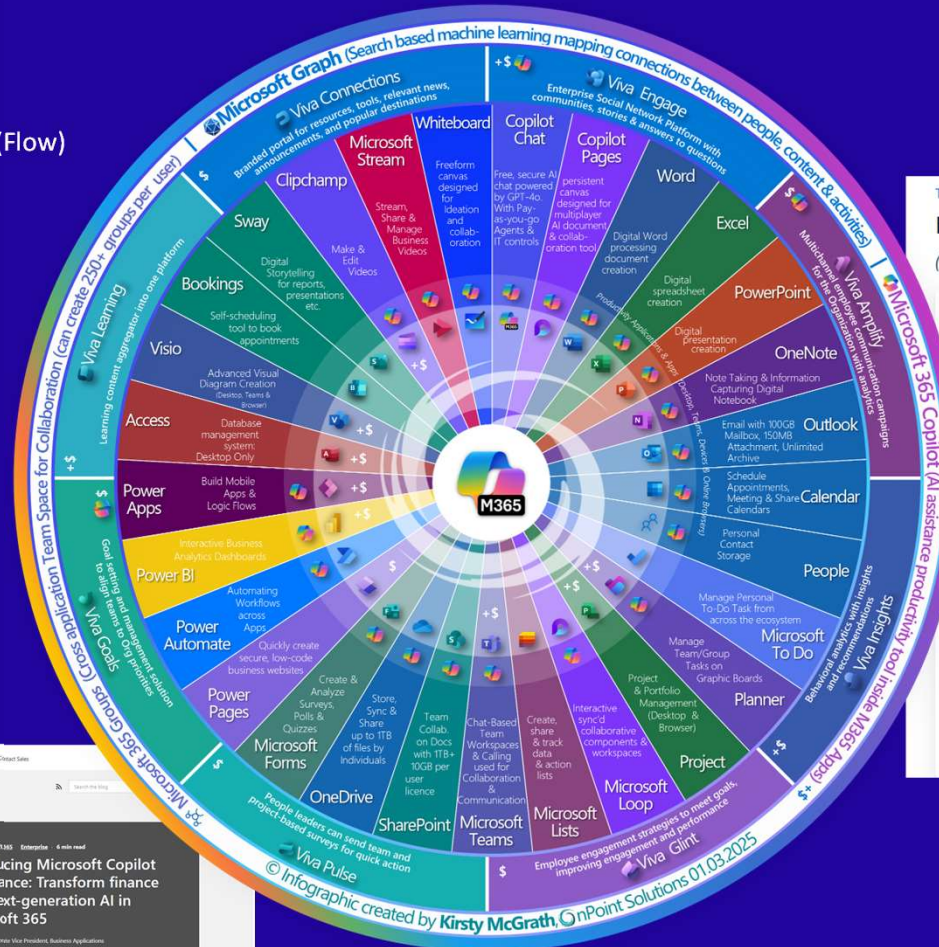


# 1. Art not Science

1. You have a system not systems
2. You have a database not databases
3. What's your operating model?
4. How does it hang together?
5. M&A is hard
6. Know more than your suppliers
7. Unpredictability – be ready for anything
8. Relationships matter – meet all the senior people you can
9. Big can be beautiful....

# Microsoft's Market Position

- Digital Dictation
- Power Automate - Process (Flow)
- RPA in PA
- Power BI
- Teams
- Stream
- Intranets
- Forms
- To do lists
- Bots
- Power Apps
- E disclosure system
- Embedded AI
- Portals/SharePoint
- Mobile Phone Apps
- OneNote
- Yammer
- Interoperability.....



# Consolidation and The Big Tech Giants

	Microsoft	Alphabet Inc (parent company of Google)	Amazon	Apple	Meta
<b>Who do they own?</b> (notable subsidiaries and acquisitions)	<b>Professional Networking</b> – LinkedIn <b>Gaming &amp; Ents</b> – Activision Blizzard, ZeniMax Media, Mojang Studios <b>Software Development &amp; AI</b> – GitHub, Nuance Communications <b>Core MS Products</b> – Azure, 365, Xbox Game Studios, Surface	<b>Core</b> – Google LLC <b>Tech &amp; Innovation</b> – DeepMind, X, Intrinsic, Jigsaw <b>Life Sciences &amp; Health</b> – Calico, Verily Life Sci <b>AI &amp; Tech</b> – Wiz, Galileo AI Inc <b>Autonomous Vehicles &amp; Delivery</b> – Waymo, Wing <b>Connectivity &amp; Infrastructure</b> – Google Fiber, Access & Energy <b>Urban Innovation</b> – Sidewalk Labs <b>Consumer</b> – Fitbit, Nest	<b>Retail &amp; Consumer</b> – Whole Foods Market, Zappos, Shopbop, Woot!, Goodthreads <b>Tech &amp; Cloud Services</b> – AWS, Ring, Zoox, Kuiper Systems, iRobot, Axio, Bee <b>Media &amp; Ents</b> – Twitch, Audible, IMDb, ComiXology, MGM Holdings <b>Health &amp; Wellness</b> – PillPack, One Medical <b>Publishing &amp; Literature</b> – Goodreads, AbeBooks	<b>Major Subsidiaries</b> – Beats Electronics, Claris International, Braeburn Capital, Shazam, Beddit, Drive.ai <b>Notable Acquisitions</b> – NeXT, Siri, AuthenTec, PrimeSense, Anobit, Emagic, IC Mask Design <b>Gaming</b> – RAC7	<b>Social Media/Messaging</b> – Facebook, Instagram, WhatsApp, Messenger <b>Virtual &amp; Augmented Reality</b> – Oculus VR, Beat Games, BigBox VR, Sanzaru Games, Camouflaj, Arnature Studio, Twisted Pixel, Within Unlimited <b>AI &amp; Emerging Tech</b> – CTRL-Labs, AI.Reverie, Scape Technologies, Giphy, Rivos, WaveForms, Play AI <b>Financial Services</b> – Novi Financial, FB Payments
<b>Annual revenue 2025 (ending 30th June)</b>	\$281.72 billion (+14.93% from 2024)	\$371.4 billion (+13.13% from 2024)	\$670.04 billion (+10.87% from 2024)	\$408.63 billion (+5.97% from 2024)	\$178.8 billion (+19.4% from 2024)
<b>Gross profit 2025</b>	\$193.89 billion (+13.38% from 2024)	\$218.91 billion (+16.28% from 2024)	\$332.38 billion (+14.48% from 2024)	\$190.739 billion (+7.62% from 2024)	\$146.53 billion (+9.1% from 2024)

## 2. You

1. RULE 1: Don't mess it up
2. Get paid
3. Form a gang, set agendas
4. What are you not being told?
5. Communication is king
6. E-partners
7. Learning
8. Air cover
9. Relationships with suppliers
10. Relationship with team
11. Relationships with partners



### 3. People

1. Location
2. Resilience
3. Size of team depends on model
4. The nature of humans
5. Training and skill sets
6. Motivation
7. Project Management
8. Special Personas

## 4. Spend

1. “Not all animals are equal” What do you want to be and do?
2. How do you compare? Benchmark (nb confidentiality and competition law).  
“Cost per user” is all that matters
3. The danger of Pyrrhic victories
4. Business cases and benefits realisation versus table stakes

# Accountancy Market Technology Stats

In 2024 Accounting firms invested on average £30,000 in accounting technologies in 12 months, a ~50% increase on the previous year ([QuickBooks](#))

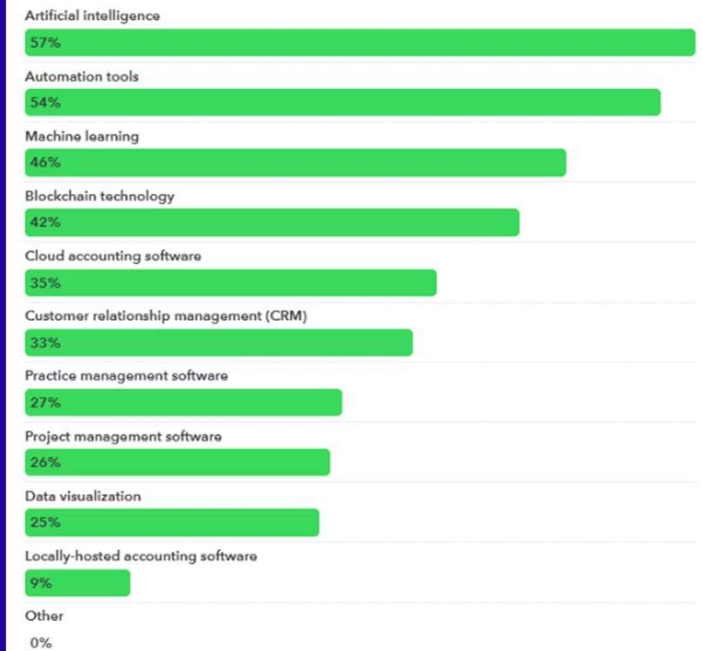
UK accountancy firms are estimated to be losing about £5.3 billion per year (~16% of potential revenue) to outdated systems, poor integrations, manual tasks etc ([DataCentreNews](#))

57% of accountancy firms plan to invest in AI tools, 54% in automation, both up from 48% in 2023. AI and Automation are now mainstream and spend priorities for 2025 ([Capsule](#))

Over 75% of accountancy firms report increased tech spending, mainly in AI and automation. Tech budgets are a standard expectation in 2025 ([Capsule](#))

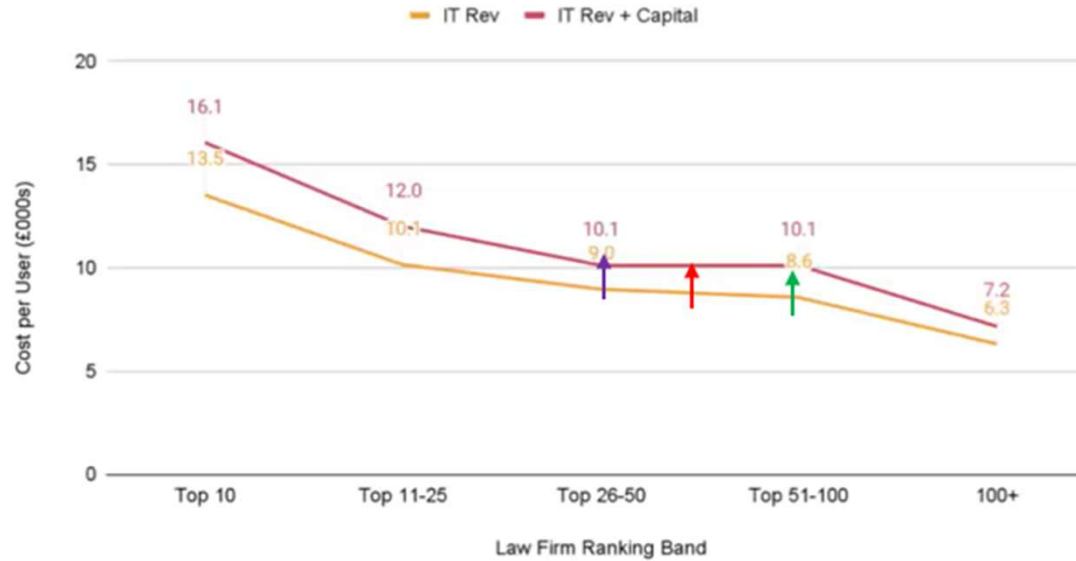
## More than half of respondents foresee AI and automation investments in the future

Over the next 12 months, do respondents foresee their businesses investing in (or upgrading) any of the following technologies?



\* Source: Quickbooks Accountant Technology Survey 2024

## Average IT Spend Per User (£000s)



## Average cyber cost\*

Band	Spend (£'000s)	Spend per user (£'000s)
Top 10	7,407	4.12
Top 11-25	1,667	1.34
Top 26-50	1,105	1.19
Top 51-100	366	0.81

\*Total annual spend on cyber security, including all staff costs, overhead costs, and any cyber security insurance you may hold, per member of UK staff

PwC Law Firm Survey 2024



## 5. Suppliers and Contracts [Saas] – The Problems

1. Price increases post initial term
2. Lack of control over budgets
3. Weak liability limits
4. Low ability to negotiate contracts [for smaller firms]
5. Vendor ability to change rules
6. M&A
7. Control over and access to data
8. Data costs
9. Challenges in getting data back
10. Back ups
11. Add-ons/Gen AI whether you want it or not
12. End of life approaches

## Suppliers and Contracts

There is no magic wand but some key points in system selection:

1. Certainty of cost formula
2. Integrations
3. Reference calls
4. Total cost of ownership
5. Term Scout and reviewing contract early
6. Future Options
7. Access to Data

## 6. Outsourcing

1. Your job is to make the right things happen not to do
2. Complexity and skills, peaks in demand
3. Relationships and management
4. Service Credits
5. Office moves
6. Emergencies

## 7. AI

What is happening and what should we do?



# What has really happened with AI/AI in the Professions?

1. Legacy AI

2. ChatGPT

3. Video

4. Deep Seek

5. Deep Fakes

6. Microsoft

7. The World  
and Dog

8. Agents and  
Search

9. Fabric/  
Purview

The Great  
Levellers

# What are professional services firms doing with AI?

## Primary AI Focus

Copilot

Azure  
AI/Chatbots

Pilots

Specific  
AI/Vendor AI

Business  
Services

Governance  
and Risk 2.0

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## Wider Market Activity – A Comparison with Law

AI Firms

Investment  
/Capital  
Profits

Product  
Launches  
and  
Reselling

Profit  
Sharing

Skills and  
Education

Robots

## 8. Hardware

1. Policies and feelgood factor
2. Choice – the right tool for the job
3. 1/3 Rule (or 1/4)
4. Leasing versus purchase
5. Fragility
6. Mobile Devices/Cost Control
7. Laptops versus PCs
8. Be involved and on pilot group

## 9. Cyber and Business Continuity

1. Understand
2. Emergency Book
3. Networking Groups and Difficult Questions
4. Third parties and Saas
5. Insurers
6. Trial invocations
7. Social DR
8. Spend?
9. Education

## 10 Closing thoughts

1. This is a key area that needs you. Take it seriously and ensure this is recognised
2. IT Professionals are great but are different to you. Harvest the best of both.
3. Become integrated and find your role
4. Get your governance and information flow sorted
5. Ditto cost management and key areas like cyber
6. Don't try to do everything yourself
7. Change is constant
8. Relationships matter
9. As does communication
10. We are just at the start of the journey with AI



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Derek Southall's Business Card

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