# Emerging Technology & Change Leadership

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# Emerging Technology and Change Leadership

Technology is reshaping operations at an unprecedented pace — requiring the adoption of new ways of thinking, leading, and delivering public service. This session offers a practical and strategic look at how emerging technologies and change leadership can drive effectiveness, efficiency, and accountability across state government.

Using real-world examples and practices that translate into governmental environments, this session explores key emerging technologies (including artificial intelligence, automation, data analytics, cybersecurity, modernization, and cloud platforms) and how they can strengthen financial stewardship, decision-making, internal controls, compliance programs, and operational performance. Participants will learn how partner with IT more effectively, and lead organizational change in environments that prioritize transparency, regulatory compliance, and public trust.

Attendees will

**Identify** key emerging technologies and translate case examples to their respective environments.

**Evaluate** the risks and opportunities of emerging technologies.

**Explain** how to partner effectively with IT, including defining business requirements, participating in technology assessments, and establishing shared accountability for project outcomes.

**Differentiate** between change management and change leadership.

**Develop** strategies to communicate the case for change, address resistance, and build stakeholder engagement across agencies, institutions, and cross-functional teams.

# Poll Question

# The Role of the Financial Leader

## Strategic Planning & Public Stewardship

- Align financial strategy with statewide priorities, legislative mandates, and agency missions.
- Lead multi-year financial planning and long-range revenue/expenditure forecasting.
- Support gubernatorial, legislative, and cabinet-level strategic initiatives.
- Evaluate the financial impact of proposed programs, policy changes, and capital projects.
- Translate policy objectives into sustainable financial plans and performance metrics.

## Development & Execution

- Lead the annual agency or statewide budget formulation process.
- Prepare budget requests, decision packages, and justifications for legislative review.
- Manage allotments, appropriations, and budget authority.
- Monitor spending and resolve variances or potential funding shortfalls.
- Collaborate with program leaders to ensure resources align with service delivery needs.

## Financial Reporting & Accountability

- Ensure compliance with GASB, state accounting manuals, and statewide policies.
- Oversee preparation of CAFR/ACFR components or agency-level financial reports.
- Maintain transparency in financial reporting for auditors, citizens, and legislative bodies.
- Provide financial updates to secretaries, boards, oversight committees, and the legislature.
- Ensure accuracy, completeness, and timeliness of statewide or agency financial data.

## Internal Controls, Compliance & Risk Management

- Implement and monitor internal controls in accordance with state requirements.
- Oversee financial compliance for grants, federal funds, Medicaid, and restricted monies.
- Monitor risk exposures including procurement, grants, IT, cybersecurity, and operations.
- Prepare for and respond to internal audits, legislative audits, and external reviews.
- Ensure fraud prevention measures and conduct investigations when required.

# The Role of the Financial Leader

**Cash Management, Treasury & Revenue Oversight**

- Manage cash flow forecasting and ensure timely payments to vendors, employees, and beneficiaries.
- Oversee revenue collection, fees, and cost allocation models.
- Optimize use of state treasury programs and investment policies.
- Track federal funds drawdowns and reimbursements.
- Ensure agencies comply with statewide cash management statutes.

**Program, Grant & Federal Funds Administration**

- Oversee financial management for federal grants (Uniform Guidance, 2 CFR Part 200).
- Ensure adherence to program-specific rules (education, transportation, health, etc.).
- Implement grant monitoring, subrecipient oversight, and risk assessments.
- Coordinate with federal agencies during audits or compliance reviews.
- Analyze sustainability risks for programs dependent on temporary federal funding.

**Procurement, Contracting & Vendor Oversight**

- Ensure compliance with state procurement statutes and competitive bidding rules.
- Conduct fiscal review of major contracts, amendments, and RFPs.
- Evaluate vendor financial stability and contract performance.
- Strengthen purchasing controls, invoice accuracy, and contract lifecycle oversight.
- Collaborate with legal, IT, and program offices on complex procurements.

**Technology, Data & Digital Modernization**

- Oversee the financial components of ERP, grants systems, and payroll systems.
- Partner with IT to modernize legacy systems and adopt cloud, automation, and analytics tools.
- Strengthen data governance, data quality, and reporting reliability.
- Evaluate cybersecurity risks that impact financial and operational systems.
- Leverage data analytics to improve transparency, performance, and resource allocation.

# The Role of the Financial Leader

## People Leadership & Organizational Culture

- Mentor and develop finance teams and establish succession plans.

- Promote a culture of accountability, integrity, and service to the public good.

- Recruit, train, and retain finance talent in a competitive market.

- Lead organizational change and manage resistance in public-service environments.

- Clearly communicate financial expectations to agency leaders and program managers.

## Stakeholder, Legislative & Public Engagement

- Collaborate with statewide budget offices, comptrollers, auditors, and treasurers.

- Prepare briefing materials, fiscal notes, and testimony for legislative committees.

- Respond to inquiries from elected officials, citizens, media, and oversight bodies.

- Strengthen cross-agency collaboration on shared priorities (e.g., grants, HR, IT, capital).

- Serve as a trusted advisor ensuring financial stewardship and public trust.

# Poll Question

# The Intersection of Finance & IT

**Participate in statewide or agency IT governance committees**

- Align financial operations with enterprise technology strategies.
- Ensure financial requirements are included in statewide modernization plans (ERP, grants systems, payroll, procurement).
- Evaluate technology investment business cases from a financial stewardship perspective.
- Support prioritization of technology projects based on mission, risk, and ROI.

**Financial System Oversight**

- Oversee operations of ERP systems (general ledger, AP, AR, payroll, procurement).
- Ensure the chart of accounts supports compliance, reporting, and analytics.
- Approve or influence system configurations that affect financial controls.
- Lead or participate in major system upgrades, replacements, or cloud migrations.
- Ensure segregation of duties, workflow controls, and approval hierarchies are properly implemented in financial systems.

# The Intersection of Finance & IT

## Data Governance & Integrity

- Establish or enforce financial data standards across the agency.
- Ensure data quality, validation rules, and reconciliation processes are in place.
- Manage master data (vendors, programs, grants, cost centers) to reduce errors.
- Collaborate with IT and program staff to define reporting and analytics needs.
- Ensure financial data is accurate, complete, consistent, and audit-ready.

## Cybersecurity & System Risk Oversight

- Understand risks associated with financial, grant, and payment systems.
- Ensure system access controls support compliance and prevent fraud.
- Monitor cybersecurity controls affecting financial systems and sensitive data.
- Evaluate business continuity and disaster recovery plans for financial operations.
- Oversee vendor and third-party risk related to cloud systems, processors, and SaaS products.

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# The Intersection of Finance & IT

## Automation, Efficiency, & Innovation

- Identify opportunities for workflow automation in AP, AR, payroll, and grants.
- Use robotic process automation (RPA) to reduce manual, error-prone tasks.
- Support digitalization of paper-based processes (invoicing, approvals, records).
- Encourage adoption of low-code/no-code tools for reporting and process changes.
- Lead staff toward a digital-first mindset to increase efficiency and transparency.

## Analytics, Dashboards & Decision Support

- Define dashboards for real-time budget execution and financial performance.
- Use predictive analytics for forecasting, grants management, and resource allocation.
- Partner with IT and program leadership to develop business intelligence tools.
- Ensure dashboards support legislative reporting and public transparency.
- Use data to monitor efficiency, equity impacts, and operational outcomes.

# The Intersection of Finance & IT

### Grants, Federal Funds & Compliance Technology

- Oversee grant management systems to meet Uniform Guidance (2 CFR 200).

- Ensure subrecipient monitoring workflows are supported by technology.

- Validate that federal reporting systems (FFATA, PMS, TRACS) integrate with agency data.

- Monitor systems that track allowable costs, match requirements, and performance metrics.

- Support technology-enabled risk assessments for federal funds.

### Procurement, Contracting & Vendor Technology Oversight

- Oversee e-procurement systems and contract management systems.

- Ensure bidding, approval workflows, and expenditure controls are properly automated.

- Evaluate vendor financial stability, cybersecurity posture, and performance.

- Review technology contracts for compliance with procurement statutes.

- Ensure contract invoices, deliverables, and milestones align with financial systems.

# The Intersection of Finance & IT

## Workforce & Technology Adoption

- Ensure finance staff receive adequate training on ERP, grants, procurement, and reporting tools.
- Lead change management efforts for modernization initiatives.
- Develop workforce skills in data literacy, analytics, and digital tools.
- Promote a culture that welcomes modernization and new technology-enabled processes.
- Identify—and mitigate—resistance to change within finance teams.

## Agency-Wide Collaboration & Public Value

- Collaborate with IT, HR, procurement, and program leaders to optimize workflows.
- Support statewide modernization committees, steering teams, or working groups.
- Promote transparency and accountability through digital reporting.
- Ensure technology investments serve equity, accessibility, and citizen service goals.
- Model responsible, ethical, and data-driven use of technology across the agency.

# Emerging Technologies

**1.Artificial Intelligence and Machine Learning**: These technologies continue to evolve, providing solutions for data analysis, automation, and advanced computing.

**2.Internet of Things (IoT)**: The expansion of connected devices, enabling smart homes, cities, and industries.

**3.5G and Advanced Network Technologies**: Providing faster, more reliable internet connectivity, and enabling new applications in various fields.

**4.Blockchain and Distributed Ledger Technology**: Widely known for cryptocurrencies, but also used in supply chain management, voting systems, and secure transactions.

**5.Quantum Computing**: Offering potential breakthroughs in computing power, impacting fields like cryptography and data analysis.

# Emerging Technologies

**8. Augmented Reality (AR) and Virtual Reality (VR)**: Revolutionizing entertainment, training, and education sectors.

**9. Biotechnology and Gene Editing (e.g., CRISPR)**: Enabling groundbreaking developments in healthcare, agriculture, and bioengineering.

**10**. **Renewable Energy Technologies**: Including solar, wind, and other sustainable energy sources.

**11. Battery and Energy Storage Technologies**: Improving the efficiency and capacity of energy storage, crucial for electric vehicles and renewable energy integration.

**12. Advanced Robotics and Automation**: Impacting manufacturing, logistics, and even personal use.

# Emerging Technologies

**13**. **Autonomous Vehicles**: Includes self-driving cars, drones, and other transportation technologies.

**14. 3D Printing and Additive Manufacturing**: Transforming manufacturing, healthcare (like bioprinting), and construction.

**15**. **Nanotechnology**: Finding applications in medicine, materials science, and electronics.

**16**. **Edge Computing**: Enhancing cloud computing by processing data closer to where it is being generated.

**17**. **Regenerative Medicine**: Includes stem cell therapy and tissue engineering.

**18. Synthetic Biology**: Designing and engineering biological systems for new applications.

# Emerging Technologies

**18. Synthetic Biology**: Designing and engineering biological systems for new applications.

**19. Neural Networks and Brain-Computer Interfaces**: Merging computing with human cognitive functions.

**20. Space Technologies and Exploration**: Advancements in space travel, satellite technology, and exploration.

**21. Flexible batteries:** Innovations in battery technology allowing for more versatile and efficient energy storage.

**22.Generative artificial intelligence:** Advanced AI systems capable of generating new content and solutions.

**23.Sustainable aviation fuel:** Eco-friendly fuel alternatives for aviation to reduce carbon footprint.

# Emerging Technologies

**24. Designer phages:** Engineered bacteriophages for targeted treatment of bacterial infections.

**25. Metaverse:** The metaverse is an emerging technology that would function as a shared, immersive digital space which can be accessed through augmented reality devices.

**26Metaverse for mental health:** Utilizing virtual reality environments for mental health therapies and support.

**27.Wearable plant sensors:** Devices for monitoring.

**28.Spatial omics:** Advanced techniques for studying cells and tissues in spatial detail.

**29.Flexible neural electronics:** Sophisticated electronics for interfacing with the nervous system.

**30.Sustainable computing:** Environmentally friendly approaches to computing and data management.

**31.AI-facilitated healthcare:** Artificial intelligence applications in healthcare for improved diagnostics and treatment planning.

# Poll Question

# Artificial Intelligence/Machine Learning

- **Artificial intelligence (AI):** The theory and development of computer system's ability to perform tasks that normally require human intelligence, such as visual perception, speech recognition, decision-making, and translation between languages.

- **Machine learning:** Machine Learning is a subset of Artificial Intelligence. Focuses on the development of computer programs that can teach themselves to adjust and change when exposed to new data.

- Concerns: Ethics / bias; transparency; job loss; cybersecurity

# Artificial Intelligence

**Generative AI** is a type of artificial intelligence that can create new content—such as text, images, audio, video, code, or data—based on patterns it has learned from enormous training datasets.

Instead of simply analyzing or classifying information, it produces original outputs that resemble human-created work.

**Agentic AI** refers to AI systems that can autonomously take actions, not just make predictions or generate content.

Unlike traditional or predictive AI—which waits for a prompt or query—agentic AI can perceive a goal, plan a sequence of steps, make decisions along the way, and execute tasks across tools, data sources, or environments with minimal human intervention.

# Robotics Process Automation

- Robotic process automation (RPA) is the automation of manual tasks using business logic and rules. RPA "bots" are used for repetitive tasks.

- RPA scenarios include automatic responses to emails to deploying thousands of bots that are programmed to automate jobs (process transactions, manipulate data, respond to queries, and communicate with other systems

- Business Process Management maps the key processes; Robotic Process Automation mimics the processes in simulated software functions. BPA and RPA modeling is enabled by automated tools that facilitate the description of existing processes and process simulations

  Concerns: design; governance; business process management

# Blockchain

- Blockchain is a public register in which transactions between two users belonging to the same network are stored in a secure, verifiable and permanent way. The data relating to the exchanges are saved inside cryptographic blocks, connected in a hierarchical manner to each other.

- **Blockchain:** transactions that can be programmed to record not just financial transactions but everything of value

- Concerns: Cryptocurrency; governance; cybersecurity

# Internet of Things

- The Internet of Things (IoT) collects and transmits data via billions of connected devices.

- The Internet of Things  describes the network of physical objects—"things"—that are embedded with sensors, software, and other technologies for the purpose of connecting and exchanging data with other devices and systems over the internet. These devices range from ordinary household objects to sophisticated industrial tools

- Concerns: Data privacy; surveillance; cybersecurity

# Analytics

Analytics is the systematic computational analysis of data or statistics. It is used for the discovery, interpretation, and communication of meaningful patterns in data.

There are several types of analytics:

- **1. Descriptive Analytics**. Answers the question of "What has happened?" by summarizing past data, typically in the form of dashboards.
- **2. Diagnostic Analytics**: Delves deeper into the data to understand the causes of events and behaviors. It answers the question of "Why did it happen?"
- **3. Predictive Analytics**: Uses statistical models and forecasts techniques to understand the future and answer "What could happen?"
- **4. Prescriptive Analytics**: This is a more advanced type of analytics which not only anticipates what will happen and when it will happen, but also why it will happen.

https://www.gartner.com/en/information-technology/glossary/analytics   https://www.spiceworks.com/tech/data-management/articles/what-is-data-analytics/

# Poll Question

# Establishing the Business Case

- Mission, Purpose & Values
- Strengths, Weaknesses, Opportunities, & Threats
- Conduct a Needs Assessment
- Define the Problem/Proposed Benefit
- Identify and Research Alternatives
- Establish Options and Develop Recommendations
- Establish Go/No Parameters
- Finalize Decisions
- Execution

# Business Partnering

- Who owns the process?
- Who has the power to change it?
- What are its objectives?
- What are the success metrics?
- Who are the customers of this process?
- Who gets to participate?
- What are the data or information inputs for this process?
- What events and milestones drive this process?
- What kind of decisions does this process generate?
- What are the decision-making criteria?
- How are decisions communicated, and to whom?
- How does this process link to other management systems?

# Poll Question

Change Leadership or Change Management?

# Change Leadership

**Change leadership** is about **driving** the change — setting vision, inspiring people, and creating the conditions for transformation to take hold. It focuses on the *human*, *strategic*, and *cultural* elements that determine whether a change truly succeeds.

**Key Characteristics**

- **Vision + Inspiration:** Defines *why* the change matters and how it advances mission and public service.
- **Culture Shaping:** Builds readiness, trust, and willingness to adopt new ways of working.
- **Influence & Engagement:** Mobilizes stakeholders across agencies, institutions, and levels of government.
- **Future-Oriented:** Anticipates obstacles, accelerators, and organizational behaviors that will impact adoption.

# Change Management

**Change management** is about **executing** the change — the processes, tools, documentation, and governance that ensure the new system or process is implemented successfully.

**Key Characteristics**

- **Structured Processes:** Training plans, communications, stakeholder maps, UAT, SOP updates, project plans.

- **Risk & Issue Identification:** Tracking readiness, adoption metrics, and resistance points.

- **Execution Discipline:** Making sure people receive the right information, at the right time, in the right format.

- **Stability:** Ensuring the transition from old to new systems is controlled, compliant, and minimally disruptive.

# Understand the Root Causes of Resistance

Before solving resistance, diagnose it. Common drivers include:

- Fear of increased workload
- Concerns about job security or reclassification
- Past failed projects or "change fatigue"
- Uncertainty about expectations or new skills needed
- Lack of trust in leadership or technology vendors
- Worries that new processes will affect compliance or audit outcomes

**Action:** Conduct listening sessions, surveys, and informal conversations. Ask: "What concerns you most about this change?"

# Communicate the "Why," Not Just the "What"

People resist what they do not understand.  They adopt what they believe in.

**Action:**

- Explain how the change supports transparency, compliance, stewardship, and modernization.

- Tie benefits to the agency's mission: serving residents, students, or taxpayers.

- Use relatable examples—e.g., fewer manual reconciliations, faster grant draws, less risk of audit findings.

# Tone at the Top is Critical

- **Leadership Sets the Pace:** When senior officials champion modernization and accountability, employees understand the importance and urgency of change.

- **Modeling Compliance and Integrity:** Leaders who visibly follow governance requirements (procurement, reporting, audits) reinforce a culture that values public trust.

- **Resource Prioritization Follows Leadership:** When executives advocate for funding, staffing, and training for technology initiatives, projects move forward with fewer delays.

# Value Proposition Messaging

- Translate Technology Into Public Benefit: Show how improved systems support faster payments, stronger internal controls, better reporting, or increased transparency.

- Align with Legislative and Auditor Priorities: Demonstrating how the change supports compliance builds credibility and reduces pushback.

- Communicate Return on Mission: For government, the value is not just dollars saved—it's risk reduced, service delivered, and trust strengthened.

# Establish a Clear Vision and Mission

- Define Purpose: Ensure that every team member understands the organization's overarching goals and how innovation contributes to them.

- Align with Values: Foster a shared commitment to innovation, risk-taking, and continuous improvement by aligning these principles with the organization's core values.

- Communicate the organization's vision regularly through meetings and internal communications.

- Ensure leaders and team members understand their roles in contributing to innovation.

# Make Leadership Visible and Consistent

- Uncertainty grows in silence. Employees look to leaders to decide whether a change is real or temporary.

**Action:**

- Communicate consistently and candidly.
- Demonstrate your commitment through behaviors—attending training, prioritizing budget, removing roadblocks.
- Align messages across agency heads, CFOs, CIOs, HR, and managers.

# Involve People Early and Often

- People support what they help create.

**Action:**

- Engage program staff and frontline experts in requirements gathering.
- Include varied users in user acceptance training and pilot testing.
- Use advisory groups, working teams, and "super users" to give staff a voice.

# Create a Safe Environment for Risk-Taking

- Psychological Safety: Foster a culture where team members feel comfortable sharing new ideas without fear of judgment or negative consequences.

- Normalize Failure as Learning: Frame failures as stepping stones for growth, ensuring that the team understands failure is a part of the innovation process.

- Hold regular "failure post-mortems" where the team reflects on what went wrong and identifies lessons learned.

- Encourage open dialogue by rewarding vulnerability and learning from mistakes.

# Empower and Enable Team Members

- Autonomy: Give teams the freedom to experiment, make decisions, and implement new ideas.

- Supportive Leadership: Be hands-off but available for guidance, focusing on enabling team members rather than controlling them.

- Allow teams to develop and experiment with new ideas or prototypes without micromanaging.

- Provide resources, tools, and time for experimentation and creative problem-solving.

# Provide Hands-On Training and Confidence Building

- A major source of resistance is fear of not being able to succeed in the new system or process.

**Action:**

- Offer role-based, scenario-based training.

- Use sandboxes so employees can practice without consequence.

- Provide cheat sheets, short videos, and office hours.

# Address Workload Realities

- Employees may resist because they feel overwhelmed.

**Action:**

- Adjust deadlines during training periods.

- Provide temporary staffing or shared services if appropriate.

- Streamline low-value tasks to create capacity.

# Celebrate Small Wins and Early Successes

- Resistance weakens when people see positive results.

**Action:**

- Highlight time saved, errors reduced, or reporting improved.
- Showcase staff who embrace new practices.
- Publicize feedback from agencies or universities benefiting from the change.

# Create Two-Way Communication Channels

People resist when they feel unheard.

**Action:**

- Use town halls, FAQs, listening sessions, suggestion portals, shared inboxes.

- Respond transparently and quickly to concerns.

- Show where feedback directly altered the implementation approach.

# Use Data to Validate the Change

- Facts reduce anxiety—especially in environments governed by compliance and audits.

**Action:**

- Present evidence: error rates, cycle times, reporting improvements, audit risk reduction.
- Compare legacy processes vs. modernized workflows.

# Build a Culture of Continuous Learning

- Invest in Development: Offer training and development programs that focus on creative thinking, problem-solving, and innovation techniques.

- Encourage External Learning: Promote learning from external sources, such as attending industry conferences, participating in innovation challenges, or collaborating with other innovators.

- Provide access to online courses, workshops, or mentoring on innovative thinking and problem-solving.

- Encourage employees to stay updated with industry trends, tools, and technologies.

# Reinforce Accountability and Governance

- Resistance persists when expectations are unclear.

**Action:**
- Clarify roles, responsibilities, and decision rights.
- Hold supervisors accountable for reinforcing change.
- Use governance committees to ensure consistency across agencies and institutions.

# Foster External Partnerships and Networks

- Leverage External Insights: Encourage the team to engage with external thought leaders, industry experts, and innovators. External partnerships can provide fresh perspectives, new technologies, and collaborative opportunities that can accelerate innovation.

- Collaborate with Startups or Academic Institutions: Build relationships with startups, universities, or innovation hubs to explore new technologies, research, and potential collaborations.

- Establish partnerships with universities for research collaborations or access to emerging talent.

- Attend innovation summits or partner with startups to explore new ideas and technologies that could benefit the organization.

Why do anything?

# Change Leadership Matters

- Aligns People Around a Shared Mission and Purpose
- Builds the Culture Required for Transformation
- Accelerates Decision-Making and Reduces Risk
- Enhances Public Trust and Credibility
- Creates Champions at All Levels

- Overcomes Resistance and Change Fatigue
- Ensures Change Is Sustainable
- Accelerates Decision-Making and Reduces Risk
- Enhances Public Trust and Credibility
- Creates Champions at All Levels

# Emerging Technology is Not Optional

- Strengthens financial stewardship and accountability
- Improves efficiency and public service delivery expectations
- Enables data-driven and forward-looking decision-making
- Reduces cyber, data, and operational risks across agencies
- Supports compliance with evolving federal and audit requirements
- Improves success of modernization and transformation efforts
- Addresses workforce shifts, training needs, and skill gaps
- Ensures fairness, transparency, and equity in technology use
- Prepares agencies for the future of digital government

# Poll Question

Resources

# The North Carolina Association of Certified Public Accountants (NCACPA)

**Mission:** To enhance the accounting profession and the community it serves through advocacy, connections, education, and resources.

**Vision:** A highly valued accounting profession advancing the success of individuals and organizations.

- Established in 1919, serving the accounting community in North Carolina and 10+ additional states for over a century.

- Membership association of 12,000+ professionals across diverse practice areas, including:
    - Advisory & Consulting
    - Business & Industry
    - Education
    - Government
    - Not-for-Profit
    - Public Accounting

- The NCACPA community includes CPAs, accounting professionals, educators, and students.

# Professional Membership Matters — NCACPA Offerings Snapshot

### Community & Connections

- Special interest groups
- Statewide Resource Groups
- Connect, NCACPA's Online Community
- Networking & social events
- Peer-to-peer connections
- Leadership & volunteer opportunities
- Career Center for staffing support

### Learning & Development

- High quality continuing education
- In-person & virtual education opportunities
- Complimentary ethics webcast
- Free Focus on the Profession Programs with key industry updates
- Access to specialized publications via the Knowledge Hub.
- Tools, templates, & support services for day-to-day work management

### Advocacy & Awareness

- Real-time policy & legislative updates from NCACPA's lobbyist
- Support political action on topics impacting the accounting profession
- Workforce development support for pipeline growth
- Scholarships for aspiring accounting professionals

Learn more at www.ncacpa.org or connect with Holly Bazemore, IOM, Relationship Manager, at hbazemore@ncacpa.org.

NORTH CAROLINA ASSOCIATION OF CERTIFIED PUBLIC ACCOUNTANTS

ncaCPA®

# Trust
# Opportunity
# Prosperity

**698,000**
Members, candidates, and engaged professionals

**10,000+**
Volunteers

**188**
Countries and territories

# AI investment and impact

**82%** U.S. business executives expect their AI investments to drive broad productivity gains and upskill their workforce.

Source: 3Q 2025 AICPA Economic Outlook Survey

# AI tools and resources

## AICPA & CIMA / AI

**AICPA & CIMA**
Together as the Association of International Certified Professional Accountants

**The Next Frontier of Finance: Taking AI from Theory to Implementation**

Insights from the AICPA & CIMA's Future of Finance Leadership Advisory Group's two-day AI workshop.

### Artificial Intelligence (AI) Tax Resource Center

Explore the library for insights, tools and guidance on leveraging AI to optimize tax practices and enhance compliance.

Closing the AI trust gap: The role of the CPA in AI assurance

Navigating the AI Revolution: Key Updates for Today's CPA

Closing the AI trust gap: The role of the CPA in AI assurance

## Josi

A vital component of any AI Accounting and Auditing toolkit, providing unmatched accuracy, reliability and security

Josi enables you to make informed decisions confidently, utilising our expert oversight and accelerate your research process by embracing the use of Artificial Intelligence.
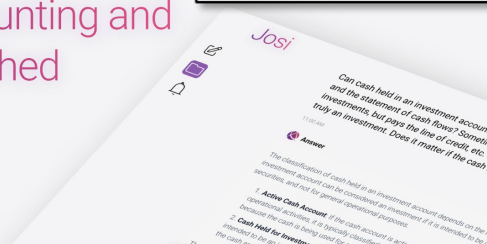
## CPA.com / AI

**Gen AI Toolkit**

**Special reports & newsletter**

**AI Symposium**
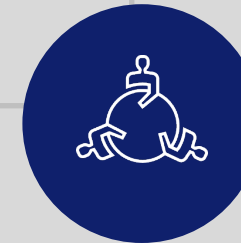
**AI focus with ecosystem and Market research**

**Special AI accelerator cohort**

# Top Seven Skills for Finance & Accounting in the Future

1. Strategic & critical thinking
2. AI Fusion & Digital skills
3. Communication & Storytelling
4. Leadership & Resilience
5. Anticipation and Future Focus
6. Innovation & Collaboration
7. Technical accounting finance skills



What are the top 5 skills Finance & Accounting need for the future?

- Strategic & critical thinking — 82%
- AI Fusion & Digital skills — 49%
- Communication & Storytelling — 48%
- Leadership & Resilience — 44%
- Anticipation and Future Focus — 43%
- Innovation & Collaboration — 43%
- Technical accounting finance... — 42%
- Agile mindset and work skills — 39%
- Data analytics — 38%
- Business acumen & Advisory skills — 28%
- Business Partnering skills — 24%
- Other — 2%
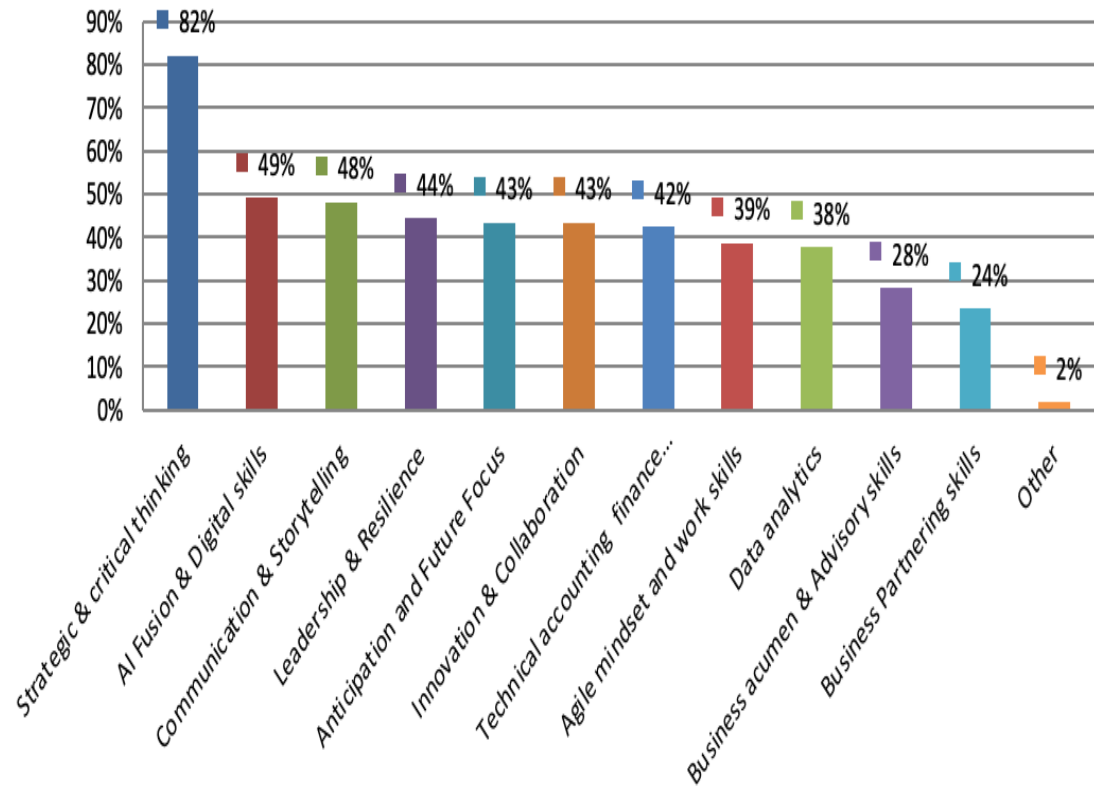
# 2025 Top Issues Facing Corporate Finance and Accounting

# The CGMA Finance Leadership Program

**AICPA & CIMA**
Together as the Association of International Certified Professional Accountants®

**CGMA®**

## Strategic Case Study Exam

**Strategic Management**
- Competitive Advantage
- Strategy Formulation
- Strategy Implementation
- Digital Strategy

Strategy Management Skills Certificate

**Risk Management**
- Enterprise Risk Management
- Strategic Risk
- Internal Control
- Cybersecurity

Enterprise Risk Management Skills Certificate

**Financial Strategy**
- Financial Policies and Objectives
- Debt and Equity Finance
- Financial Risks
- Business Valuation and Acquisitions

Corporate Financial Strategy Skills Certificate

## Management Case Study Exam

**Performance and Project Mgmt.**
- Business Models
- Leading and Managing People
- Project Management

Team Performance Management Skills Certificate

**Advanced Mgmt. Accounting**
- Cost Competitiveness
- Organizational Performance
- Pricing and Capital Investment Decisions
- Managing Risk and Uncertainty

Financial Planning and Analysis Skills Certificate

**Advanced Financial Reporting**
- Advanced Financial Statements
- Complex Group Reporting
- Financial Statement Analysis
- Long-term financing

Financial Statement Analysis Skills Certificate

## Operational Case Study Exam

**Digital Finance**
- Finance Function Transformation
- Finance Business Partnering
- Data and Analytics

Digital Finance Skills Certificate

**Management Accounting**
- Cost Accounting
- Budgeting and Planning
- Short-term Decision Making

Budget and Cost Analysis Skills Certificate

**Financial Reporting**
- Regulatory Environment
- Financial Statements
- Principles of Taxation
- Managing Working Capital

Financial Reporting Skills Certificate

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Enterprise Pillar          Performance Pillar          Financial Pillar

## Foundation Level - Business & Finance Essentials

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Diploma in Advanced Management Accounting

Diploma in Management Accounting

* Non-business related, High School & Two-Year College Pathway

**CPA** DEVELOPMENT PATH TO CGMA DESIGNATION

**Finance or Accounting** degree holders

**Four-year degree – business related, non-financial**

All learning and exams are based on experiential case studies where your staff will learn the language and techniques of your corporate clients and CFOs.

# The value of CGMA

**Resource Hub:** Home to the latest developments in corporate accounting and finance

**ENGAGE365 Community:** A dedicated space for members to connect with experts, peers and thought leaders

**CPE**: Free and discounted CPE on key and emerging topics

**Access**: to global FM Magazine and Future of Finance thought leadership.
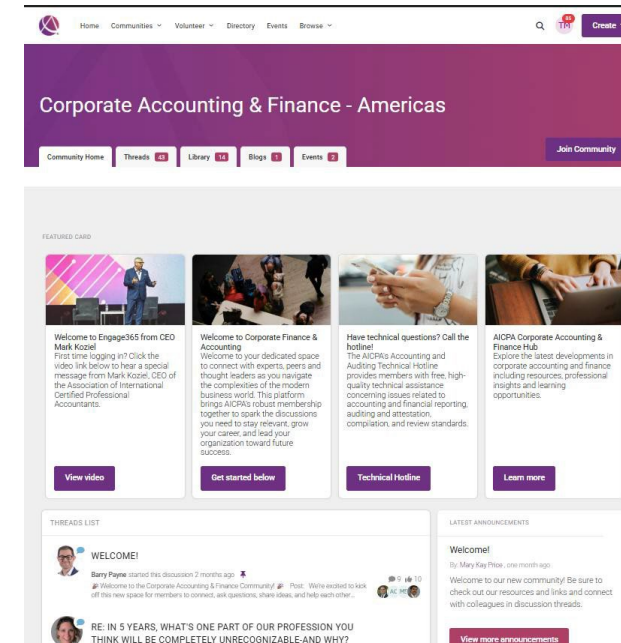
**Achieve CGMA:** studying through our world leading Finance Leadership Program Platform or CPE eligible Accelerator program for CPAs

Corporate Accounting & Finance Hub

Corporate Accounting & Finance Community



Specialized resources for corporate accounting and finance

Tools and guidance designed to help you thrive in corporate accounting and finance

# AICPA member feedback: CEO Listening Tour

"We're asking members What can the AICPA
do for them? What can we do for their career?"

— **Mark Koziel**

## Key themes:

- Small firm support

- Audit needs in local government

- Legislative support

- Talent pipeline

- CPA branding

- Building communities

Continue to share your feedback at **AskMark@aicpa-cima.com**

SUCCESS

# Thank You

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