



MPB | Leadership Accelerated

Contemporary Issues: Performance Management, Professional Development, and Hybrid Teaming

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Level Setting

Agenda

- Understanding the Current Landscape
- The Efficacy of Current Tools
- Cohesive Strategies to Be the Employer of Choice
- A Self-Reflective Look at What You Need to Consider Now



The Quiet Resignation

Where are we now?

- 50% / 75%
- We need to know WHY now!
- Emotional Index
- Cultural Index
- What is elsewhere that we don't have here? Comparative Analysis
- Double the rate of retirement – massive succession planning issues
- Fatigue: Our people are tired and having crossroads conversations with themselves
- 98% of accountants are stressed at work EVERY DAY
- Throwing bodies at it will not work
- Making Space for NextGen Firms



External Factors

- Uncertainty
- Remote Work Possibilities
- Expansion of Opportunities
- Money
- Benefits
- Cultural & Societal Changes
- Loss of Reliable Childcare
- Change in Perspectives
- Slow Down in Professional Development and Promotions
- Hottest Job Market in Decades
- AI!
- PE!

What is Your Hybrid Workplace Plan?

Internal Factors:

- Lack of Defined Career Paths
- Management and Leader Abilities
- Rigid Back to Work Requirements
- Staffing Too Lean (lower-level work)
- Overwork and Stress Levels
- Cultural Challenges
- Lack of Innovation
- Lack of Diversity
- Disconnection to Teams and to Firm as a Whole



Why People Leave an Accounting Firm:

- Incorrect Expectations at Hiring
- BE HONEST
- Include the candidate in the potential future vision
- Misalignment of personal vision with firm vision (lack of development)
- You don't provide adequate support for the person to do the job well
- Poor Management
- Unbalanced workloads
- Poor culture (75%!)
- They don't feel they belong long term

Private Equity

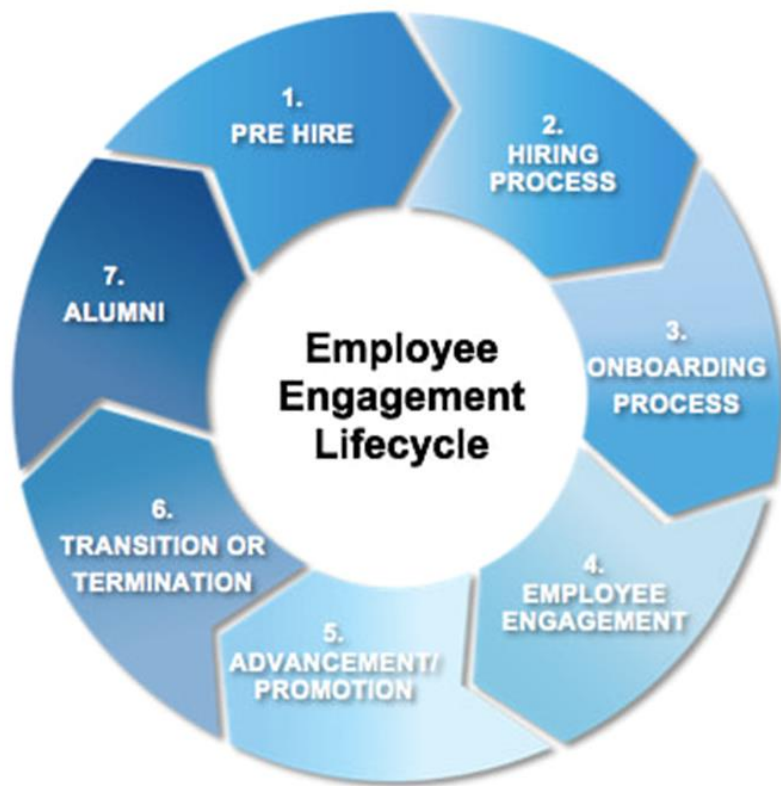
Changing the Landscape

AI

Things to Ponder NOW

Performance Management





Awareness to Action

The Great Resignation



- Consistent, Holistic Criteria
- Wider Breadth
- Remote
- Relationship Building
- Values Based Hiring
- Marketing!

- Support s/b individualistic
- Managing Expectations
- Education & Tutelage
- Touch Points
- 30-60-90 day plans

- Equity
- Benefits
- Policy Shifts
- Culture Building
- Advocacy & Support
- Flexibility
- Inclusion & Belonging
- Self Care

- ASSESS
- Career Trajectory Analysis
- Power Mapping
- Performance Management
- Pipeline Management
- Leader Expectations

Step 1: Know the Culture You Currently Have

- Why do people come and why do they stay?
- Surveys and Assessments
- Roundtables & Open Forums
- 360 Feedback
- One-on-One Check-Ins
- Well-being
- Career Pathing
- HR Data Analysis
- Improve Communications Immediately

Step 2: Create A Business Strategy

- Client Service Journey (marry the work with the people)
- AUTOMATE and Innovate: Save the highest end work for your staff
- Use the best technologies
- Explore new skill sets that fit (Be expansive)
- Explore explicit career path(s)
- Know what your people want and need (see step 1)
- Change how you serve clients & manage

Step 3: Create a Talent Acquisition Strategy

- Explicit & Expansive Criteria
- What does a high performer act like in our firm?
 - What support did we provide?
- Wide Nets & Relationship Building
- Create Selection Questioning
- Values Based Hiring
- Consistent Messaging: who, why?
- Robust Internship Programs
- Establish Remote Possibilities
- Branding & Marketing



Talent Acquisition:

- Who? Be broad and specific at the same time!
- Why? Why do these people match what works best in your firm?
- Why are YOU the Employer of Choice?
 - Differentiators
 - Do they matter to new people? To current employees?
- WHERE?
- Marketing: communication of your employer story to the broader marketplace
- Should align to what you say to EVERYONE

Step 4: Redefine The Purpose of Physical Space

- Culture Building!
- Apprenticeship
- Professional Development
- Leader Modeling
- CONNECTION
 - To self
 - To leaders
 - To firm
- How do we effectuate ease of work and management of personal life in a new way?

Step 5: Culture Building

- People strategy starts and ends in culture
- Hold yourself accountable
- It is HARD to find talent, focus on retention concurrently with talent acquisition
- How do you ensure every single employee reaches their fullest potential at your firm and has a fully inclusive experience?
- Leaders
- Managers
- Individuals
- A Solid Communications Strategy
- What values are we purporting to have? How do we exemplify them by:
 - KPIs, Rewards, Promotions, Coaching, Decision-making

Step 6: Professional & Leader Development

- Managing/Leading people in a Hybrid Workplace
- The wall between personal and professional is now a gauzy veil
- Skill sets differential
- Firm Management skills for younger leaders
- Culture – which one are you promoting?
- Reward a well-defined, broader range of behaviors

Step 7: Diversity, Equity and Inclusion

- It's a Cultural Imperative
- It's a Universal Cultural Lift
- It's Virtually Indistinguishable from Culture Building
- Clean Your Own House
- What Firms are Focused on Right Now
- The Non-Existent Magical Basket of Diversity
- Get Real and Assess It
- Make It Real and MEASURE IT

Extra Credit

- Mental Health Considerations
- Stress and Burnout
- Offshoring Culture Challenges
- Remote Workers



Call to Action:

**Where do you stand and where
are you going and how are you
going to get there?**

Q&A



Thank You



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