



Embrace the Evolving Role of the Tax Professional

By Walter N. Gavula

The tax profession faces many challenges in the current regulatory, compliance, and technology environment. Simultaneously, there are increasing internal firm pressures on tax professionals to operate more efficiently and effectively and to contribute more to bottom-line growth. All these elements are changing the roles of tax professionals, whether they are seasoned or in the beginning phases of their careers.

At Drucker & Scaccetti, we are proactively addressing the realities of how these changes are affecting tax professionals today and preparing them for tomorrow. It is critical for firms to prepare all their people to lead, coach, and navigate through the impending changes; this will be a key factor in determining individual

and organizational success.

In this column, I look at what organizations like mine are doing from a human resources perspective to address the impacts on the tax profession and maintain its relevance going forward. I will focus on three areas: leadership accountability, upskilling, and embracing and adapting to alternative work arrangements.

Leadership Accountability

In the children's game "Follow the Leader," the children all line up behind the leader. The leader then moves around, and all the children follow and mimic the leader's actions. In many organizations, this same behavior also exists. People follow and mimic what their leaders do and say. If leaders are not embracing, support-

ing, and visibly implementing change in their organizations, this behavior will be mimicked by others.

To evolve, tax organizations must demand leaders and managers who think outside the box, look for new ideas, and champion change. This will help people accept, navigate, and embrace the inevitable evolution of the profession.

Here are some tactics organizations can take to ensure leaders are stepping up and accepting the accountability to lead their staff through change:

- Use a 360-degree feedback tool or competency assessment to address change management issues and to provide training or development where gaps exist.
- Offer training at all levels of your

organization that addresses the skills needed for the future. Training should help build a critical mass of people with a balanced skill set and the ability to adapt and pivot as change occurs. Ensuring that current and future leaders are receiving a balance of technical, technological, and business/soft skill training helps create an environment that doesn't reward "what" is getting done but "how" it is getting done.

- Consider putting a leader or manager in charge of implementing a new learning program or technology enhancement that will create efficiencies for the tax function.
- Develop formal mentor or coaching programs that offer support in navigating career aspirations. In our organization, we recently implemented a revised coaching structure that aligns our professional staff into coaching "pools" by skill level, with firm leaders and managers acting as primary coaches. Our goals are to help identify and address the current issues staff are facing, uncover future

development needs, and provide leaders with the opportunity to fine-tune and enhance their mentoring and coaching skills.

Upskilling

With a tight labor market and qualified people in short supply, organizations are training employees to develop skills to meet the changing demands of their jobs and the profession. In an era of increasing automation and new business priorities, upskilling takes on an urgency. But this is more than just a new term for professional training and development: upskilling is a necessity for the future firm.

The tax profession should embrace this trend. Employers who offer valuable and relevant training opportunities build their reputations as employers of choice and increase employee satisfaction, engagement, and retention.

Six critical skills the tax professional should focus on include the following:

- Innovation – The ability to identify, embrace, and apply innovation via artificial intelligence and other emerging technology trends.

- Data analytics – Analysis of data in real time (i.e., the emergence of the "tax technologist" who can understand both data analytics and tax rules).
- Emotional intelligence – Understand and apply the concept of emotional intelligence in dealing with both work colleagues and clients.
- Consulting and advisory – Shift away from the purely compliance perspective to one where you enhance advisory and consulting skills.
- Change management – Recognize the need for change and innovation, and embrace new ways of thinking and working to align with overall business objectives and values.
- Communications – Effectively communicate technical knowledge while building relationships with colleagues and clients who increasingly work in nontraditional ways (i.e., remote workers, reduced work weeks, and other alternative work arrangements).

Here are a few ways organizations can focus on addressing the upskilling challenge: ▶



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- Establish and implement core competencies for the tax professional. Include not only those skills mentioned above, but also those that are applicable for your organization and business.
- Evaluate and identify employees' skill sets against core competencies required for success in current and future roles. Provide group or individual learning and developmental opportunities to meet skills gaps.
- Recruit employees who may not fit the traditional tax profile skill set, but who do possess the necessary skills critical to meeting future business

upskilling as part of your recruitment process and integrate it into existing talent processes throughout the employee life cycle. A culture of upskilling will allow mentoring and coaching opportunities to naturally form, and it can help with retention!

Alternative Work Arrangements

The tax profession, like most others, has a workforce with heightened expectations and demands for greater work-life balance and flexibility. We must ensure we embrace and adapt to alternative work arrangements, for both our own organizations as well as for clients who are moving

to link people into training programs or meetings? Do staff have the equipment to effectively participate remotely?

- Develop (or revise) policies related to workplace flexibility and ensure they address critical issues affecting your organization, including data security and confidentiality.
- Ensure expectations are set with managers and staff regarding how the traditional manager/employee relationship will change because of the workplace flexibility options you adopt. As part of the recent revision of our organization's alternative workplace flexibility policy, we incorporated guidance to managers and employees outlining the expectations both should follow to make the arrangement a success.

The tax profession will face many challenges as we move through the third decade of the 21st century. Professionals who only function as tax preparers are rapidly becoming relics that do not fully support the changing needs of businesses. Organizations must provide learning and upskilling opportunities for staff to keep them productive, engaged, and able to quickly respond to internal expectations and external client needs.

Leaders play an important role in defining how the tax function will evolve and fit into the future. Their willingness and ability to identify and embrace change and bring others along is critical in driving the function forward. Providing current and future leaders with appropriate training that balances technical and soft-skills education is yet another tactic to implement.

While the journey and evolution of the tax profession into the future may seem daunting, the future will be bright if you plan now to prepare your workforce for success. 

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in this direction.

Tax functions need to mobilize around the impact these trends will have on recruitment, training, and ongoing development of staff. Here are some important steps organizations should take to address alternative workforce trends:

- Align the how, where, and who you recruit today with your anticipated work environment of the future.
- Review how you deliver training and development today, and determine how it can be revised to accommodate people's work schedules and the locations from which they work. Do you have the latest technology

needs. Work with local college and university recruiting sources to convey the changing skill sets you seek.

- Implement comprehensive individual development plans for employees. Allow them to create the plan and assess why the skill development is important and how they will use it. Employee input in creating this plan will boost engagement and commitment.
- Make upskilling a part of the culture of your organization. It must be more than a professional buzzword; it must become part of the DNA of the organization. For example, incorporate

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