Accountants Growth Academy

Tring – 25th June 2026

RemarkablePractice
Helping Ambitious Accountants Humanise the Numbers

Humanise the Numbers

Challenge – Connect – Transform

Improve


OUR VALUES & BEHAVIOURS
Choose high standards
Focus on value first
Get off the fence
Make their day
People and planet centred
Make a difference
Earn the right – serve well
Foster constructive criticism
Be worthy of notice
Do worthwhile work
Humanise the numbers
Be wholehearted
Team first
Love what you do; have fun doing it
At the edge – learning
Be there

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Today's agenda

09.30 – 10.45	What's your problem with AI?
11.00 – 12.30	Strategic v. Tactical?
13.30 – 15.00	The human side of AI
15.15 – 16.15ish	Action planning and next steps

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THE FIRM OF 2030

How AI is reshaping accountancy — and what your firm must do about it now

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THE BURNING QUESTION

34%

of firms have NO IDEA
how AI will affect their headcount

THE BURNING QUESTION

74%

of firms cannot increase billable work — not enough skilled staff

THE BURNING QUESTION

79%

of accountants expect growth
in advisory services as AI takes over
routine work

THE BURNING QUESTION

57%

of UK finance leaders plan
to integrate AI instead of hiring

THE BURNING QUESTION

18%

salary premium for AI-enabled accounting roles vs equivalent non-AI roles

THE BURNING PLATFORM

Before we begin — what do these numbers tell us?

3%

of Big Four job ads are now
for auditors — vs 7% for AI specialists

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What else is happening around AI right now?

3rd parties/suppliers

Big 4

Legal profession

Clients are using AI!

Which model best describes your firm's AI adoption?

What stage is your firm at?

1

Good Foundations

- Cloud infrastructure & Azure
- Quality laptops for everyone
- Reliable IT support
- Core cyber security in place

2

Collaboration & Tools

- Teams adopted firm-wide
- SharePoint for documents
- Teams Telephony
- Intranet & knowledge base

3

Integration & Process

- Practice management optimised
- Time & billing automated
- Client onboarding streamlined
- Power BI dashboards live

4

AI & Automation

- Copilot deployed with governance
- AI tools in audit & tax
- Automated workflows
- Digital client portal

What’s your problem with AI?

Discuss on your tables and prioritise your top three issues/threats and challenges around AI

What problem(s) are you trying to solve with AI?

Strategic v Tactical

8 Question Strategic Health Worksheet

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ACCA Think Ahead

This 1-page strategic health worksheet provides a visual framework in which you can capture and share your 'short-hand' answers to the 8 questions of strategic health.

Team First

Qu.1 Personal goals: How will your firm's strategy deliver on your personal goals?

Qu.2 Business vision: What does success look like at your firm?

Qu.3 Core purpose: What do you and your firm stand for?

Qu.4 Values and behaviour standards: How must you and your colleagues behave?

Client Focus

Qu.5 Things stable in time: What matters most to your clients?

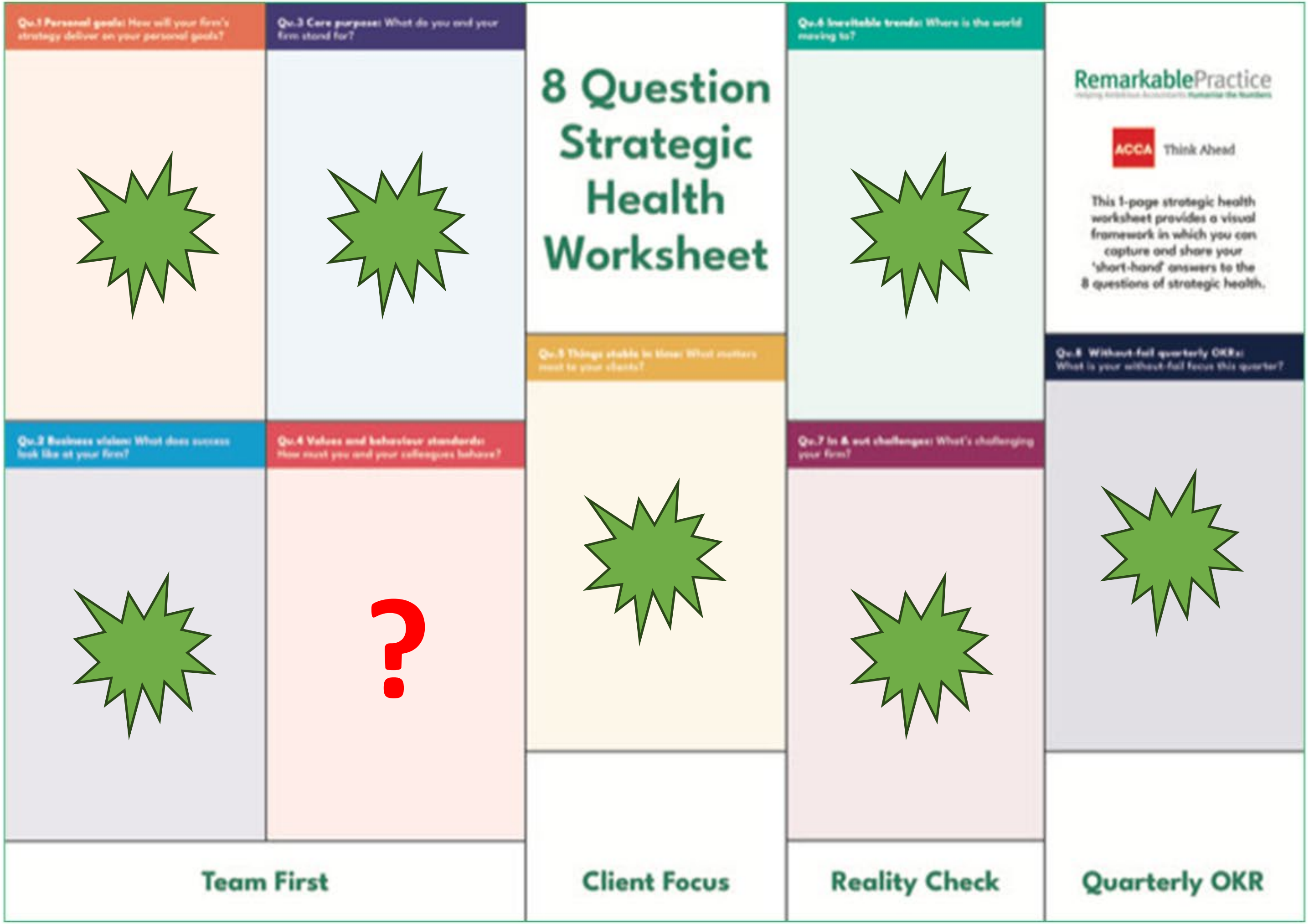
Reality Check

Qu.6 Inevitable trends: Where is the world moving to?

Qu.7 In & out challenges: What's challenging your firm?

Quarterly OKR

Qu.8 Without-fail quarterly OKRs: What is your without-fail focus this quarter?



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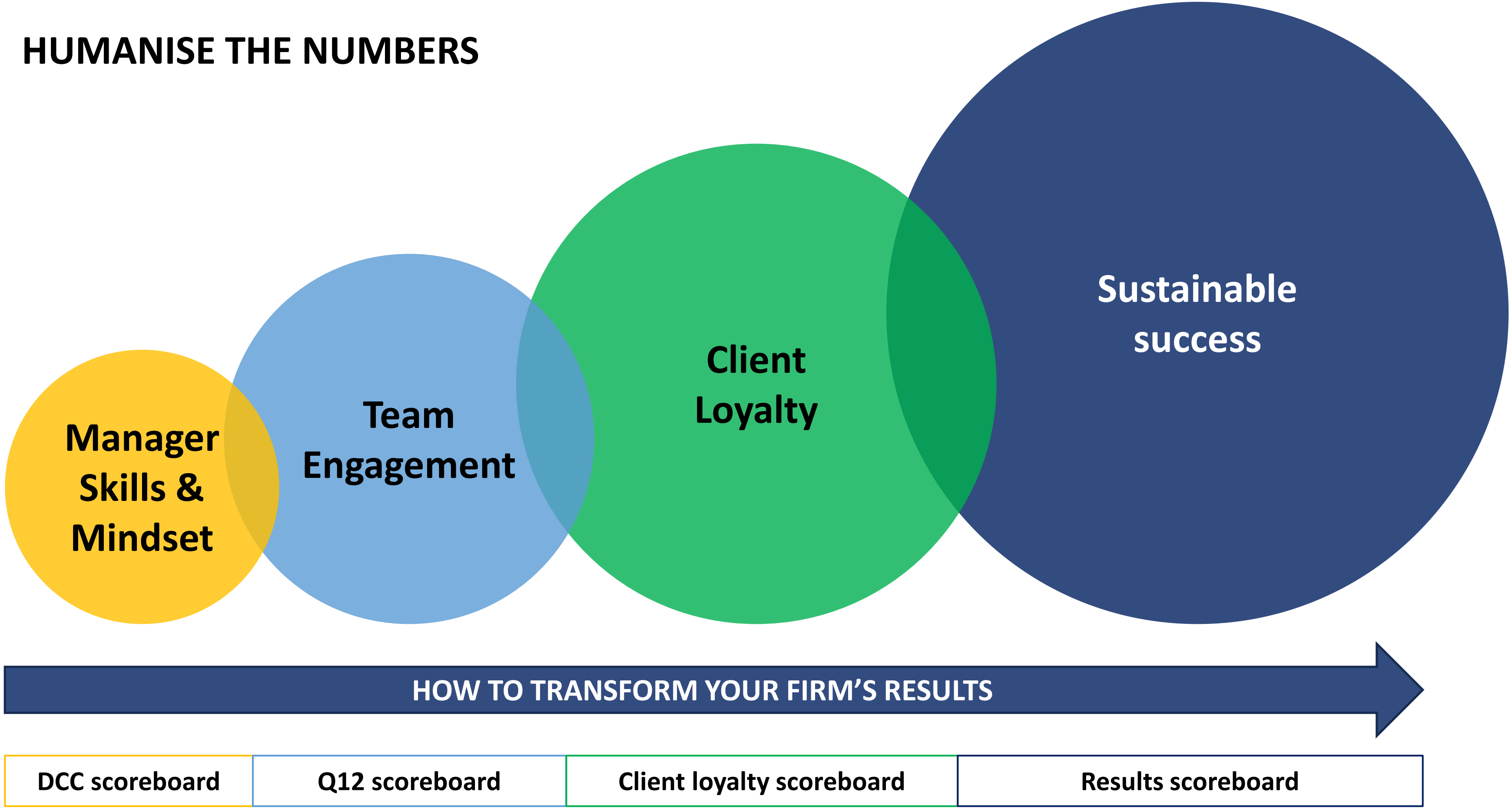
HUMANISE THE NUMBERS



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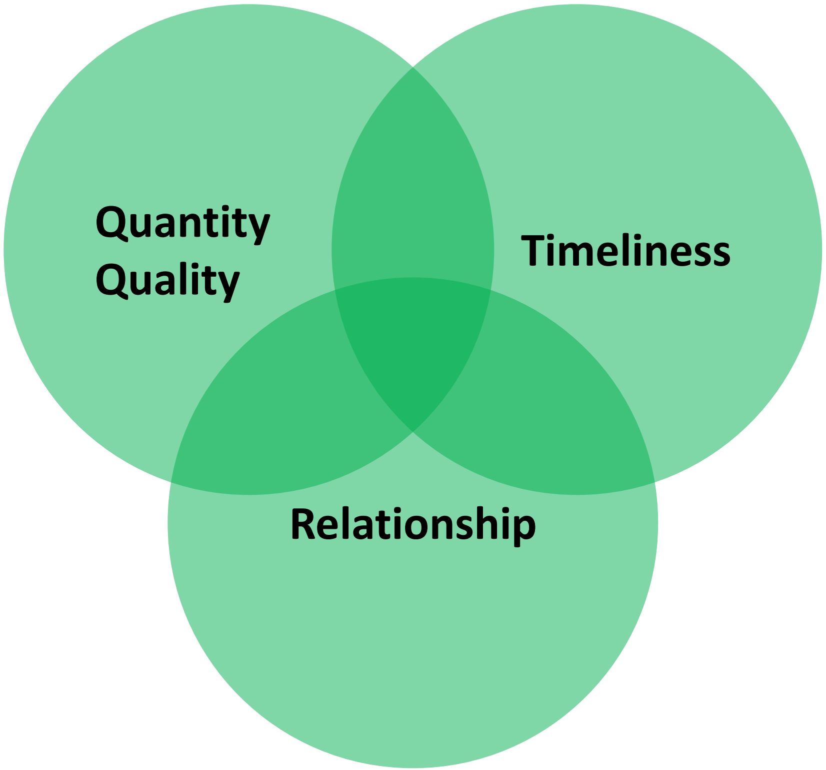
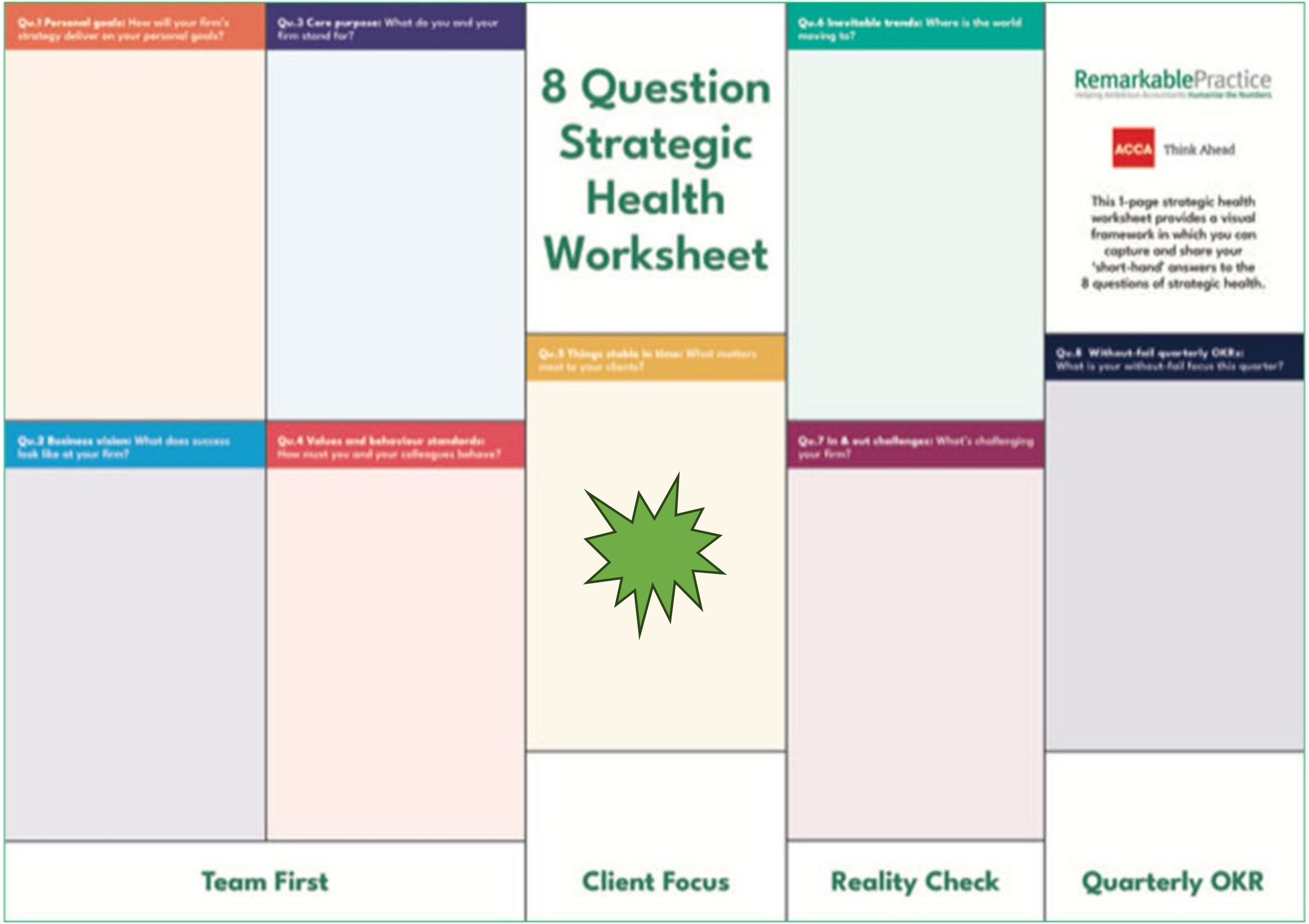


HOW TO TRANSFORM YOUR FIRM’S RESULTS



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Quarterly OKR

What are your three things stable in time?

What will clients always want from you?

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Wayne Hockley – Anthony Russel

Matthew McConnell – Pulse

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(Opinion/Advice; Security/Peace of Mind/Personal human service)

What will clients always want from you?

Matthew McConnell – Pulse

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What will clients always want from you?

Matthew McConnell – Pulse

(Forward-thinking advice/Supportive guidance/Great client experience)

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What must you change to do more of what clients want from you?

Your three things stable in time

Foundations

Where do you start?

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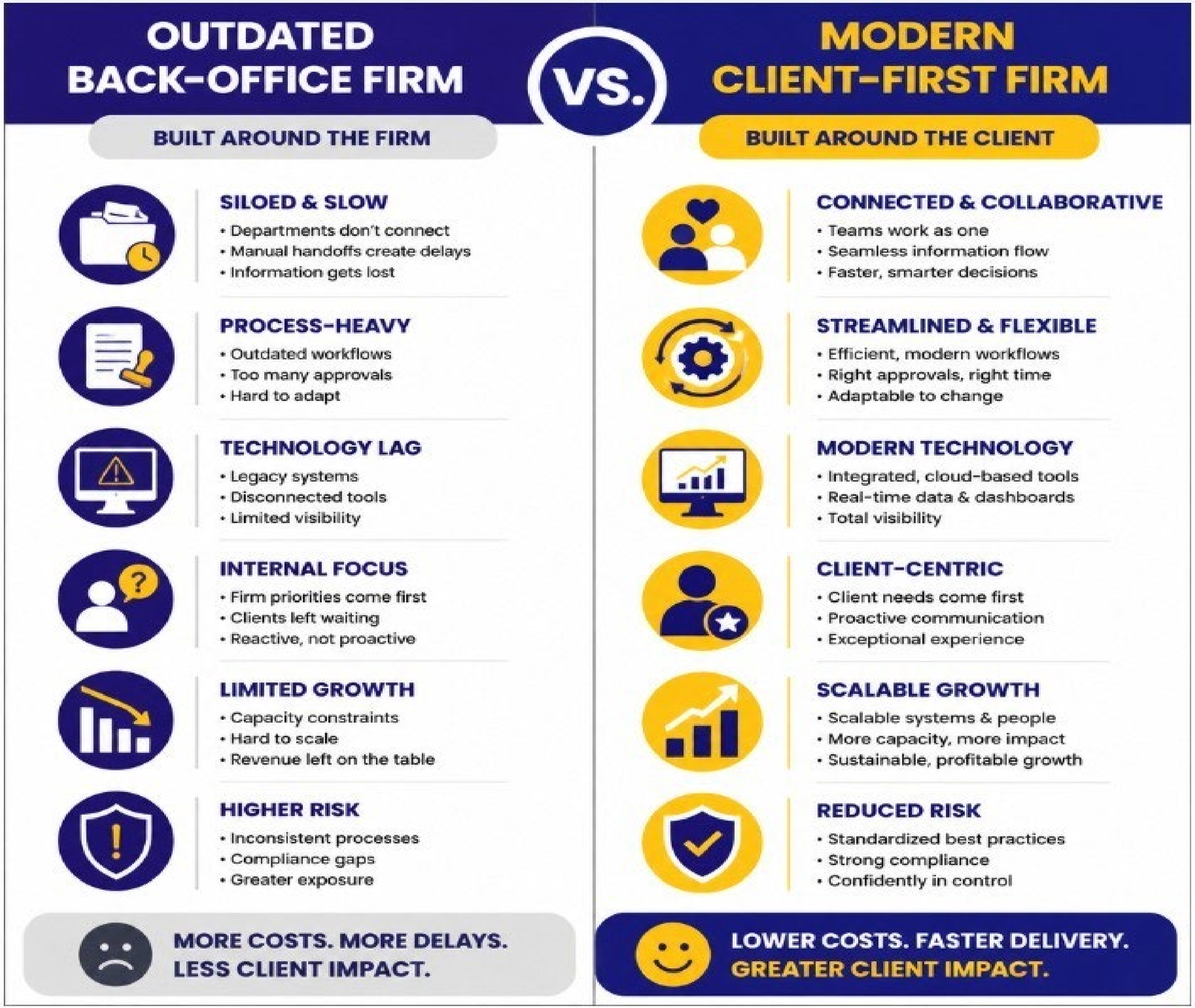
Foundations – pain points and how to fix them

1. Book-keeping
2. Workflow management
3. On-boarding
4. Reporting & client visibility

Foundations – pain points (and how to fix them)

What causes pain at the moment in these areas?


OUTDATED BACK-OFFICE FIRM
VS.
MODERN CLIENT-FIRST FIRM
BUILT AROUND THE FIRM
BUILT AROUND THE CLIENT
SILOED & SLOW
• Departments don't connect
• Manual handoffs create delays
• Information gets lost
CONNECTED & COLLABORATIVE
• Teams work as one
• Seamless information flow
• Faster, smarter decisions
PROCESS-HEAVY
• Outdated workflows
• Too many approvals
• Hard to adapt
STREAMLINED & FLEXIBLE
• Efficient, modern workflows
• Right approvals, right time
• Adaptable to change
TECHNOLOGY LAG
• Legacy systems
• Disconnected tools
• Limited visibility
MODERN TECHNOLOGY
• Integrated, cloud-based tools
• Real-time data & dashboards
• Total visibility
INTERNAL FOCUS
• Firm priorities come first
• Clients left waiting
• Reactive, not proactive
CLIENT-CENTRIC
• Client needs come first
• Proactive communication
• Exceptional experience
LIMITED GROWTH
• Capacity constraints
• Hard to scale
• Revenue left on the table
SCALABLE GROWTH
• Scalable systems & people
• More capacity, more impact
• Sustainable, profitable growth
HIGHER RISK
• Inconsistent processes
• Compliance gaps
• Greater exposure
REDUCED RISK
• Standardized best practices
• Strong compliance
• Confidently in control
MORE COSTS. MORE DELAYS. LESS CLIENT IMPACT.
LOWER COSTS. FASTER DELIVERY. GREATER CLIENT IMPACT.

THE FUTURE OF WORK

TECHNOLOGY AUTOMATES TASKS. PEOPLE DRIVE IMPACT.

REPLACING MANUAL LABOR	VS.	IRREPLACEABLE HUMAN SKILLS
REPETITIVE TASKS Routine, repetitive actions are automated for speed and consistency.		**CRITICAL THINKING** Analyzing complex problems and making thoughtful decisions.
DATA ENTRY Manual data input is replaced by intelligent systems with high accuracy.		**EMPATHY** Understanding people, perspectives, and emotions to build trust.
PHYSICAL LABOR Machines handle heavy lifting, assembly, and physically demanding work.		**CREATIVITY** Imagining new ideas and solutions that drive innovation.
BASIC CALCULATIONS Simple calculations are done instantly and error-free by software.		**LEADERSHIP** Inspiring, guiding, and empowering teams to achieve shared goals.
DATA PROCESSING Large volumes of data are processed and organized in seconds.		**COMPLEX COMMUNICATION** Navigating nuance, storytelling, and building strong relationships.
SCHEDULED WORK Predictable, rule-based tasks are automated and run on autopilot.		**JUDGMENT & VALUES** Applying experience, ethics, and values in uncertain situations.

TECHNOLOGY CHANGES WHAT WE DO.
HUMAN SKILLS DETERMINE HOW FAR WE GO.

PEOPLE ARE THE COMPETITIVE ADVANTAGE.

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What must you change to build your firm's AI foundations?

Foundations

Governance

Issues around AI governance

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What must you change to build your firm’s governance foundations?

Governance

Pricing

Discuss on your tables the implications for pricing work in an AI age

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What must you change to build your firm's pricing foundations?

Pricing

What skills do you now need to consider recruiting for?

THREE FORCES RESHAPING THE PROFESSION

The Service Shift

Compliance is commoditising. Advisory is the growth frontier. AI is accelerating this faster than most firms have planned for.

The Staffing Paradox

Talent shortage and AI adoption are colliding simultaneously. 74% of firms can't take on more work — not enough people. AI fills the gap but changes the shape of teams.

The Training Time Bomb

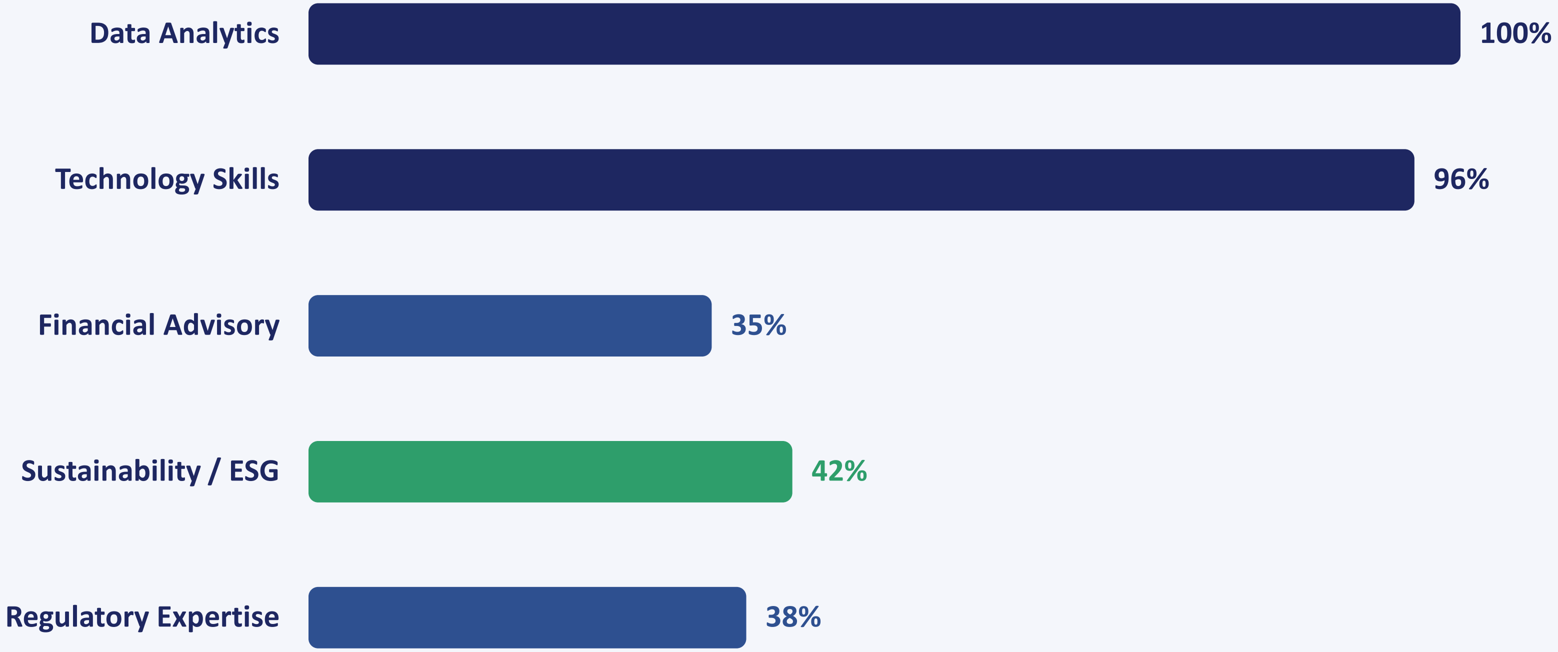
The scaffold that trained generations of accountants is collapsing. The mundane work that built professional judgment is disappearing. Nobody has fully solved this yet.

“

If the junior who joins your firm today won't do the work that trained you — what are you actually offering them? And what are they building towards?

WHAT FIRMS ARE ACTUALLY HIRING FOR — RIGHT NOW

ICAEW research: 74% of mid-tier firms expect to increase specialist hiring. Here's the breakdown:



AI-enabled roles now command approximately 18% higher salaries than equivalent non-AI positions (Source: The Interview Guys, 2026)

PART A — WRITE THE HIRING BRIEF

You need to hire 5 people in the next 12 months. You cannot hire in the traditional mould.

What does the role actually do day-to-day?

Not the aspirational JD — the honest version of what they'll spend their time on in year one.

What skills genuinely matter?

Data literacy? Client communication? AI fluency? Sector expertise? Be specific — not 'good with people'.

What non-traditional backgrounds would you accept?

Could a data scientist with no accounting background add more than a graduate trainee? Could a sector specialist from industry?

What does the career path actually look like?

If junior compliance is gone, what is the progression from day one to partner? Draw it honestly.

30 minutes → Tables present their brief → Peer challenge welcome

TABLE EXERCISE — 5 MINUTES

What did your firm look like in 2015?

1. What work do you do today that simply didn't exist then?
2. What has disappeared from your service offering since 2015?
3. What does your team structure look like now vs then?

What skills do you now need to consider recruiting for?

Brainstorm the type of skills that might be required in an AI firm

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What must you change to recruit for the skills that might be missing from your firm?

Skills

What will your organisation chart look like in 2030?

What type of skilled people will we need when AI is fully adopted?

10:00 SESSION 1

Burn the Org Chart

Design your firm from first principles — as if the pyramid never existed

THE BRIEF

Redesign your firm from scratch

It's 2030. AI handles all transactional and compliance work reliably.
Design your firm — roles, structure, career paths — from first principles.
You cannot simply replicate today's structure.

Questions your design must answer:

- If you've removed the junior compliance tier — where does judgment come from in ten years?
- If every role is advisory — how do you price and sell it consistently?
- Who trains the advisers of 2035 if there's no transactional foundation to learn from?

30 mins table work → 5 mins each table presents → Facilitated debrief

The core dilemma

The mundane work that trained you is disappearing. You cannot give junior staff the same developmental foundation you had.
So what replaces it? Not a vague intention — an actual programme.

- Forvis Mazars has already launched an explicit internal programme training relationship and interpersonal skills — in direct response to AI removing junior compliance tasks.
- Leading firms are redesigning junior roles to combine human talent with AI: entry-level staff working alongside AI tools, building judgment by supervising outputs rather than generating inputs.
- The firms that solve this first will have a structural competitive advantage. Those that don't will produce advisers with no technical foundation — and clients will eventually notice.

Table discussion: What is your firm's deliberate answer to this question?

What do your people need, to feel comfortable using AI?

How do you successfully implement AI in your firm?

This is a leadership issue!

What the Best Firms Do Differently

It's rarely about budget. It's almost always about ownership.

01 They name an owner

A Partner or Director takes personal accountability for technology. Not "the IT department" or the MSP, a senior leader who cares and drives it forward.

02 They set a 12-month roadmap

Not a wish list: a sequenced, prioritised plan with milestones. It's reviewed quarterly. Progress is visible to the whole firm.

03 They invest in people, not just tools

Training is built into every project. Staff are shown what's possible. Champions are identified in each team to drive adoption from the inside.

04 They measure the outcomes

Billable hours reclaimed. Onboarding time reduced. Support tickets down. They know what good looks like and they track whether they're getting there.

05 They don't wait for perfect

They start with what they have, show early wins, build momentum. The firms making the most progress moved quickly.

06 They choose the right partner

They work with someone who knows their sector, challenges their thinking, and holds them accountable, not just a supplier who fulfils tickets.

11:30 SESSION 2

The Service Audit

Plot your firm's revenue honestly — then face the gap between now and where you need to be

MAP YOUR SERVICES — TWO GRIDS

Grid 1: Where your services sit TODAY   Grid 2: Where you want them in 5 years

⚠ Vulnerable	✓ Protected
? Opportunity	★ Target Zone

HIGH REVENUE

LOW REVENUE

← LOW AI REPLACEABILITY   HIGH AI REPLACEABILITY →

Individual exercise — 10 minutes

1. Plot your firm's current service lines on Grid 1 — honestly, not aspirationally
2. Plot where you want them in Grid 2
3. The gap between the two grids IS your strategy
4. Table discussion: what must you stop, start, and do differently?

The facilitator's challenge: push back on vagueness.
'Advisory growth' is not a strategy.

12:30 LUNCH

Structured — not free

Each table gets a different question. Assigned seating — not your usual colleagues.

Table A	*"What skill does your best junior have that AI cannot replicate — and are you actively developing it?"*
Table B	*"If a client could get compliance done by AI for £200/month, what would make them pay you £2,000/month instead?"*
Table C	*"Name one thing your firm is doing purely out of habit that you would not design from scratch today."*

Brief back — 10 minutes — at 13:20 before Session 3

15:00 SESSION 4

AI — Honest Inventory

Not a technology showcase. A frank audit of where your firm actually stands.

THE AI AUDIT — THREE COLUMNS

What AI are you actually using today?

Be specific. Not 'we're exploring it.' Name the tools, the tasks, the workflows. How many people? How often?

What's working and what isn't?

Where has it delivered? Where has it disappointed or created new problems? Where are people working around it?

The single biggest untackled workflow?

The one workflow that would most benefit from automation — that you haven't tackled yet. What's stopping you?

Only 17% of firms can accurately assess AI's impact on their people. Put your hand up if you're in that 17%.

A FRAMEWORK FOR AI INVESTMENT DECISIONS

Three questions — not a vendor list

Does it remove work nobody should be doing?

If yes — strong candidate. Eliminate before you automate where possible. But automate before you continue paying people to do it.

Does it free time for work clients will pay more for?

If it just speeds up a £50/hour task to create space for more £50/hour tasks, the economics don't stack up. It must unlock higher-value time.

Does it make your people more or less capable over time?

The most underasked question. If a tool removes the learning that used to happen in that task, the efficiency gain has a hidden cost. Price it in.

The firms that get ahead won't be the ones making the loudest noise about their AI capabilities.

They'll be the ones that make it quietly safe, repeatable — and frankly, boring.

AccountingWEB, 2026

The question isn't whether AI will change your firm.
It's whether you'll be the one shaping how.