

**Summary of BKR International’s**

**Americas Regional Group Zoom Meeting**

**July 17, 2020**

**2:00 p.m. Eastern Time**

BKR’s Americas Region convened its first group Zoom meeting by size, which was held on July 17. The meeting included member firms with fees of $10 million or more. AJ Johnson welcomed members and outlined the agenda, which included open peer-to-peer discussion of member topics and BKR updates. Howard Rosen, Worldwide CEO, joined the call and shared that he has been in constant communication with members throughout BKR, including the Americas Region.

There were several board members on the call who also welcomed the group, including Alan Gubernick (Philadelphia), Jim Schmidt, Vice Chair/Treasurer (Phoenix), and Jeremy Vokt (Omaha).

Participating were:

Steve Braunstein (Washington, D.C.)

Todd Eaton (Rochester)

David Goldner (Baltimore)

Alan Gubernick (Philadelphia)

Aiysha (AJ) Johnson, Executive Director, Americas Region (New York)

Bud Jones (Mt. Arlington)

Jim Krauss (New York)

Howard Rosen, Worldwide CEO (New York)

Jim Schmidt (Phoenix)

Jeff Thomason (Memphis)

Jeremy Vokt (Omaha)

Chris Ward (Louisville)

The purpose of this call was to understand the specific needs of larger firms during times of rapid change, and to allow peer-to-peer sharing among attendees. We will be hosting upcoming calls for mid-sized and small firms on October 27 and November 17, respectively. Members will be invited according to the fee structure below:

* Top Tier Firm Size: $10M and up
* Mid-sized Firms: $5M - < $10M
* Small firms: < $5M

Peer-to-peer discussion included:

**Technology**

* Technology remains an important topic for member firms. Several members participated on calls to understand MindBridge and how it can benefit their firms. Currently, the MindBridge Task Force participants have not moved forward with MindBridge AI solutions. The task force is led by Micheal Burch (Ottawa).
* Power BI is currently used among a few members on the call, and at least one person is exploring Inzata as a data analytics tool.
* The availability for support varies by firm. However, everyone agreed that technology and data analytics should be further explored.

BKR will be hosting a session, Future Ready Firms & Technology Trends vs. Reality on August 13, to help member firms navigate through decision-making for technology.

Ian Khan, Futuracy, joined BKR as a new strategic alliance partner, and will present the session on August 13. Click [here](https://bkramericas.com/bkr-event.php?region=bkr-americas-region&Future-Ready-Firms-Technology-Trends-Vs.-Reality&num=856) to register.

**Talent Management and Hiring**

* Most attendees expressed an interest in a hybrid Talent Management Workshop, where we address how to effectively manage teams remotely (virtual) and plan a workshop in 2021 for in-person attendance.
* Some firms have also shared that they have been able to conduct strategic hiring and bring in top talent from other firms who were impacted by the pandemic.
* Some firms have ceased raises during the pandemic but continued staff recognition through promotions. The opportunity for bonuses ranged among firms, and several will wait until the end of the year to determine next steps.

BKR will host a session, Managing Your Remote Accounting Team, on September 24. Jeff Phillips, Accountingfly, will present this session. Click [here](https://bkr.com/bkr-event.php?region=bkr-worldwide&Managing-Your-Remote-Accounting-Team-Webinar&num=862) to register.

BKR’s Human Resources Practice Group will host a session on September 22 to address how firms can properly implement diversity, equity, and inclusion efforts in the workplace. Crystal Cooke, AICPA, will present this session. Click [here](https://bkramericas.com/bkr-event.php?region=bkr-americas-region&Diversity-and-Inclusion-in-the-Workplace-Tools-Tips-and-Resources&num=853) to register.

**Member Overview**

* The participants suggested that a member overview would be helpful to share with staff to ensure that they are aware of the services that BKR provides.

BKR will work on the development of an updated overview that can be accessed on-demand and shared internally among members and their teams.

**BKR Updates**

View the calendar of events [here](https://bkramericas.com/save-the-date.php?region=bkr-americas-region&save-the-date) or contact [bkr@bkr.com](mailto:bkr@bkr.com) if you have questions about any upcoming events.

* Master Tax Guides and discounted products: Available to order in August.
* Annual Tax Planning Guide: Available in August.
* Future Ready Firms & Technology Trends vs. Reality: August 13
* Virtual A&A Clinic: August 18-24
* CAS 2.0 Virtual Workshop: September 16-17
* Diversity and Inclusion in the Workplace: Tools, Tips and Resources: September 22
* Managing Your Remote Accounting Team: September 24
* Managing Partner Roundtables: December 6-7

Status - With current travel restrictions and social distancing requirements, we will announce if the meeting will be moved to virtual. We are currently in conversation with the Waldorf Astoria.