

University of Mississippi

eGrove

---

Newsletters

American Institute of Certified Public  
Accountants (AICPA) Historical Collection

---

10-1999

## AICPA Insider, Volume 1, Number 4, October 1999

American Institute of Certified Public Accountants (AICPA)

Follow this and additional works at: [https://egrove.olemiss.edu/aicpa\\_news](https://egrove.olemiss.edu/aicpa_news)



Part of the [Accounting Commons](#)

---

---

# AICPA INSIDER

THE INFORMATION SOURCE FOR TEAM AICPA

Volume 1, Issue 4

October, 1999



## Paving the Way for KnowledgeNet

Tom Lemmon and Linda Volkert

*As the entire AICPA team becomes familiar with KnowledgeNet in our day-to-day work lives, we wanted to report on the expectations and experiences of some of the earliest users of the tool. Several pilot projects were established to see how KNet could be incorporated into a variety of "typical" Institute work efforts. The Insider spoke with some of the "captains" of the pilot projects, which were in various stages of progress at the time of the interviews*

### Committee Pilot

David Ray is a senior administrator on the President/CEO team and is responsible for coordination of committee operations at the AICPA. The Insider spoke to David about the KNet Committee Pilot project.

"The bottom line is we need to get the AICPA's committees up on KNet by end of year. The pilot is setting basic standards for using committee space on KNet. Conducting the pilot is allowing us to surface any problems early on."

David believes the importance of implementing KNet is magnified by the recently announced committee restructuring. "Now that there will be fewer standing committees and more ad hoc task forces that will disband when work is done, we need a way to continually interact with one another rather than through meetings and conventional e-mail. With KNet we can create a true collaborative environment to do work." David also believes that we can not only cut back on meetings, but can make face-to-face meetings more effective. "Committee members will be able to get some work done before they get together. Using tasking and other functions also will allow staff liaisons to move the meeting along more efficiently."

Prior to the introduction of KNet, the committee operations team was looking for some online means of working with

committees and other volunteers. According to David, "There were experiments using the AICPA Web site and setting up e-mail listserves. We're finding that KnowledgeNet brings it all together in one place."

David feels that one of the unique benefits of KNet is that it allows control over creating, organizing and sharing your work, "There is no longer the need for intervention of an MIS third party if you want to create a project space, a folder, a discussion group, etc."

David reports that one committee's use of KNet could be very different from another's. "Some focus on the on-line discussion feature. Others need the compound document feature. We will focus on several key functions at first so as to not overcomplicate things. Just as with our staff teams, we will tailor each training session to meet the committee's specific needs."

The response from the committee pilot users has been very positive. All the participants have been enthusiastic and motivated to use KNet. "The members like it," says David. "They feel much more connected to the Institute and the projects they are involved in. I'm looking forward to the full rollout."

## Team AICPA News Briefs

- The AICPA is launching a new **Center for Investment Advisory Services** that will assist members in building an investment advisory practice, whether they are just at the beginning stage of this exciting service line or already experienced practitioners. The Center (<http://investmentadvisory.aicpa.org> or 1-877-66AICPA) will offer access to a host of tools, training, resources and relationships. Contact Beth Kaestner at X3378 for more information about the availability of specific Center services.
  - The establishment of a new **accreditation program in Information Technology** is under consideration by the AICPA's volunteer leadership. The AICPA Council will be asked this month to ratify the Board of Director's recent action to begin the new accreditation program, described as a designation "for CPAs who act as the bridge between management and the technologist." Contact Nancy Cohen at X6010 for more information on the IT accreditation.
-

Information migration involves moving digital information from one storage place to another. The AICPA's Information Migration Pilot has charted the course for moving certain information to KnowledgeNET that is essential in managing our work and promotes work/life balance. Consequently, the output of this pilot program is relevant and beneficial to all of us.

The *Insider* spoke to the captain of the Information Migration Pilot Project, Hugh Kelsey of the Knowledge Management Team, to get the full scoop.

**Migration of cc: Mail bulletin boards to KNet**

Anyone who has used the cc: Mail bulletin boards understands how difficult it can be to find what you want and how frustrating it is to discover that a bulletin board has become stale. The Information Migration Pilot is leading the effort to not only move our current cc: Mail bulletin boards to KNet but also to make this important information more complete, current and accessible to everyone.

How will it work? According to Hugh, "Each AICPA team will have its own public space on KNet to encourage more information-sharing throughout Team AICPA. Public spaces will have specific owners who will be responsible for establishing *and maintaining* team folders on KNet. Much of the currently valid and important information on the bulletin boards will find their way to the team public spaces."

**Development of the KNet Surfboard.** Many AICPA initiatives in recent years have focused on helping staff achieve a healthy work/life balance. The Surfboard on KNet (formerly the Splash Cafe—see June's *AICPA Insider*) is another step in that direction because it will allow us to obtain and share information that will help us manage and enrich our personal lives -- and have fun, too.

The Surfboard will take you to:

- virtual bulletin boards of employee classifieds, personnel news, key services near each of our offices, etc.; and
- fun spots, including direct links to humorous web sites and information on employees' favorite hobbies

It's also a *great way to learn to use KNet* because some of the teaching tools, such as online "Help" and "About KnowledgeNet" are found on every page. Hugh says, "The KNet Tool allows us to change our culture. We can think about what might be done instead of just finding a better way to maintain the status quo. An employee forum, for example, might otherwise be hard to do and almost impossible to reach everyone at once in a cross-functional team project."

KNet capabilities don't stop here. Spaces can be created on KNet to propose ideas, keep records and open avenues of communication with people involved in projects.

"KNet capabilities offer us a chance to manage things in a more effective way because it fulfills many functions. Pilot users use KNet as a communication and work vehicle by posting documents for consideration, and using discussions to consider new ideas and employing task lists to manage activities." Contributors to many projects can come from a wide range of teams within the Institute. Therefore, according to Hugh, "By using KNet pilot users get to know more people, which in turn facilitates problem solving."

When the pilot started, Hugh expected an uphill battle to get people to participate. "I thought I would have to do most of the work myself. Actually, much to my surprise, pilot users seem enthusiastic about the software and have shown extraordinary energy and commitment in moving the pilot along."

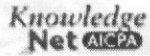
In short, Hugh and his fellow pilot users can't wait to say, "SURF'S UP! Come on in!"

## V-Team Recommendations Under Consideration

On August 13, the V-Team, following six months of information gathering, analysis, and much discussion and debate, presented a proposal for the future alignment of resources of the AICPA. The V-Team's report is now under review by the executive staff of the Institute. As reported earlier, the V-Team identified a set of core value streams, which you can think of as sets of inputs, transformations and outputs. The outputs represent the delivery of something valuable to AICPA members and other constituents. In its analysis, the V-Team had a distinctly forward looking approach, keeping in mind the CPA Vision and the explosive changes in the marketplace that our members and the Institute face every day. As with the Vision for the profession, this forward thinking approach was balanced with a need to maintain the values that have defined the history of the profession and the Institute, including life-long learning, ethics and integrity and a commitment to the public interest.

**The senior management team is committed to a process of careful deliberation and consideration of the V-Team recommendations and other alternatives for change. They are equally committed to appropriate, effective and timely communication to the staff regarding decisions made in those deliberations, once important decisions are made.**

- employee forums on non-work-related-issues;



## Member Satisfaction Pilot

The leader of the Member Satisfaction (Mem. Sat.) pilot program is Walling Almonte. Walling has served as "Mr. Information Central" for the Mem. Sat. team for the past 3 years. As Walling explains, "Mem. Sat. is a frontline user of all information about the Institute. Our success is measured by our ability to provide satisfactory answers to our members' inquiries. A key ingredient in that success is how much, how well and how often other teams in the AICPA share their information with us."

Because of Mem. Sat.'s frequent contact with our members, they are in a good position to inform other teams about the kinds of information and assistance our members are looking for. According to Walling, "We can let other teams know what they need to put up on KNet to the degree that it answers the frequently asked questions of members."

On a practical level, Walling and the members of the Mem. Sat. team see KNet as the replacement for the diverse collection of reference aides and other tools that they currently maintain. Anyone who has visited Walling's office knows his workstation is equipped with an amazing array of manuals, binders, promotional pieces, catalogues and other

## Group of 100 to Meet in November

An August *Team AICPA Bulletin* described the introduction of a new model for making the most of AICPA's volunteer members by relying more on limited-term project-specific task forces and having fewer standing committees. As part of the new model, the Institute has formed a high profile "Group of 100," consisting of the most prominent, forward thinking CPAs from across the U.S.

The objective of the Group of 100 is to enhance the leadership role of the CPA profession in enabling people and organizations to shape their futures amidst the complexity and rapid changes of the marketplace.

The Group will gather for the first time in Chicago on November 2<sup>nd</sup> and 3<sup>rd</sup>, to contemplate environmental trends

## The "Electronic Institute" Elevator Story

*An elevator story is a brief but effective description of something that can be communicated to another person or persons in the time it takes to take a short elevator ride. It's helpful to practice your elevator stories about what you are working on, a burning issue you have, or a proposal you might have. You never know who might be in the elevator with you – your SVP, the CEO,...a potential investor? Here's the elevator story for the Electronic Institute concept, critical to our Web First initiative.*

resource materials. "And that is just the paper based materials," he says. "We have an extensive set of files in our LAN shared directory, as well as the cc: Mail bulletin boards, which we need to pull up on screen from time to time."

With eight key team members trained and working on the KNet pilot, Mem. Sat. is already making use of the tool by working out a shared service agreement with the Creative Services team. Final promotional materials will be scanned by the CS team and posted in a special folder on KNet. The Mem. Sat. team will then have access to these materials on their desktops in advance of the mailing to members.

Like members of the other pilot projects, the Mem. Sat. group understands the challenges that lay ahead as we fully integrate the KNet environment. But according to Walling, they are looking forward to it. "We're really fascinated to see how this new technology helps us to better meet the needs of our members."

and issues that will affect the future of the CPA profession and its clients, employers, and consumers. Two leading experts on technology, Sheldon Laube, the former chief technology officer at Novell, and Check Martin, author of the New York Times Business Bestseller, *The Digital Estate*, will participate in the meeting. Here's the agenda:

- Discuss economic and technological trends
- Identify threats and opportunities for the CPA profession and its customers
- Prioritize the opportunities
- Define projects to realize the opportunities and avoid the threats

For more information about the Group of 100, contact Leigh Knopf at X6132 and stay tuned for postings on KNet.

The Electronic Institute (EI) is an Internet based network that connects CPAs, financial professionals, business advisors and consumers to a virtual world of business information, tools, and services.

As a premier "business professional portal," the EI is a single point of access to information, branded content, education, collaboration, networking, referrals, business tools, and other Web-based offerings.

## MIS to BTI: A Critical Team Takes a New Approach

The Management Information Systems Team, under the leadership of the AICPA's first Chief Information Officer, Johan Margono, has conducted an in-depth review of their mission, objectives and operations. As a result, they have announced some organizational changes that should enhance the team's ability to provide maximum value to all of Team AICPA and our members. The changes include a new structure and a new name, the Business and Technology Integration (BTI) team.

It's important to note that the MIS/BTI restructuring comes on the heels of the implementation of a program/project management framework for the group, *which is being viewed as a prototype for the entire Institute*. According to Johan, "We're in the process of finalizing a program/project management framework that is not IT-specific. It is a full life-cycle framework that covers the program/project conception phase through the deployment and operation phase. It will clearly define roles, responsibilities, and performance measures of project team members."

### A New Way of Operating

Just as our members view themselves as strategic business partners to their clients and employers, the BTI Team intends to function as a proactive partner with all AICPA teams. According to Johan, his group is not simply a technology support team. "The BTI team is in the business of integrating AICPA's strategies with its business processes, technologies, and human capital. BTI team members will be expected to identify and deliver value to AICPA and its members in a variety of ways. As we are hearing over and over again, this is a crucial time for the Institute, we must step up to the challenge of our member's Vision."

Johan continues, "Because we are essentially in the information business, our organization's effectiveness at integrating processes and systems that bring that information to people is crucial. The recent focus on being Web first has required us to be much more nimble, proactive, creative, forward thinking, customer focused, and disciplined – all simultaneously. Our team is in the middle of all that."

### A Matrix Organization

In order to accomplish its objectives, the BTI team has been reorganized into a matrix (or two-dimensional) structure. The first dimension means that each member of the team belongs to one of four "competency" groups. The second dimension assigns each BTI staffer as a dedicated member of a specific project team.

### Competency Groups

Here is a description of the four competency groups, the identified leaders and their missions:

- **STRATEGY** - helps AICPA formulate its business strategies and align structure, business processes and IT architectures with those strategies. *Leader - TBA*
- **PROCESS** - helps AICPA define processes required to achieve business results, implement information systems and technologies in support of new business processes, or manage business processes on an ongoing basis. *Leader – Michele Lombardo*
- **TECHNOLOGY** - helps AICPA achieve exceptional business results through application of leading technology solutions. *Leader – John Scott*
- **CHANGE MANAGEMENT** - helps AICPA implement business and organization change. Manages change plans to predictable outcomes through understanding of interdependencies of human behavior, performance measures and rewards, culture and organizational structure. *Leader – Gary Garris*

"We are assigning individuals with strong skill sets to match each of the competency groups. This will enable them to work closely with all the other teams involved in achieving results." For example, there will be a close working relationship between our Strategy group and the Strategic & Operational Planning group. Likewise, the change management group will work closely with the HR team's organizational development unit. The Process group will work with all of the process owners in just about every team at the Institute.

### Program/Project Management

BTI Team members are a part of the resource pool to be deployed to cross-functional projects. Once part of a project team, the BTI member is a dedicated resource to that project. After the project is completed, the BTI team members return to the resource pool, and are available to be deployed to other projects. *See the next page for a current list of projects and team assignments.*

According to Johan, the BTI team is involved at every stage of a project. "Instead of being passive implementers of technology projects, BTI team members will help identify potential changes to AICPA's strategies, business processes, technology, and human capital to enable the Institute to meet or exceed our Vision-aligned objectives."

## AICPA Projects & Business Technology Integration Team Members

Here's a list of AICPA projects and BTI team members assigned to them. Please note that many of these projects involve members from a number of Institute teams, and that the BTI member is not necessarily the cross-functional team leader. In addition, a complete set of BTI team members will soon be posted to the team's *KnowledgeNet* home page.

### **Telecomm**

- *John Scott*

### **Help Desk**

- *Bill Borgeson*

### **LAN/WAN Infrastructure**

- *Tarron Weir*

### **PC Infrastructure**

- *Bill Borgeson*

### **KNet / Committee Restructuring**

- *Michele Lombardo*

### **KNet Rollout**

- *Gary Garris*

### **Lotus Notes e-Mail Function Rollout**

- *Tarron Weir*

### **PeopleSoft/HR**

- *Selmo Alamilla*

### **Computer Operations**

- *Jose Morales*

### **Y2K**

- *Rich Lanza*

### **AS/400 Stabilization**

- *Dan Coloprisco*

### **AS/400 Environment and Security**

- *Carmen Hidalgo*

### **Medallion Stabilization**

- *Dan Coloprisco*

### **Project Phoenix (Enterprise Resource**

### **Planning/Customer Relationship Management)**

- *Alex Stecyna*

### **AICPA New Web Site**

- *Kevin Gately*