



Practice Management Series for SMPs (November - December 2021)



Run yearly since 2018, this series of seminars on practice management aims to help practitioners from small and medium practices (SMPs) better prepare for the challenges and opportunities ahead, adapt to changes, improve their management and operational efficiency, as well as to support their sustainability and future success.

Topic (Programme code)	Date and time	Speakers
Recruiting and engaging with staff members (EWEB21110901)	Tuesday, 9 November 2021 12:30 p.m. – 2:00 p.m.	Ms Catherine Wong Chief Development Officer, Chorev Consulting International Ltd
Preparing for the new Hong Kong Quality Management Standards (panel discussion) (EWEB21121001)	Friday, 10 December 2021 6:30 p.m. – 8:00 p.m.	Ms Michelle Chu Assurance Director, Moore Hong Kong Mr Charbon Lo Partner (Audit and Assurance), Crowe (HK) CPA Limited Mr Jeffrey Chan (Moderator) Chairman, Small and Medium Practices Committee Working Group on Practice Management, HKICPA
Automation and analytics: digitization beyond ERP for additional value (EWEB21121601)	Thursday, 16 December 2021 12:30 p.m. – 2:00 p.m.	Mr Ricky Leung Practice Manager, ONE Pacific Limited

Language	Cantonese (supplemented with English for technical terms)
Format	Webinar
Fee (for each)	HKICPA member or student: HK\$150 IA/ HKIAAT member or student: HK\$150 Non-member: HK\$330 <i>(A confirmation email will be sent to you when your registration is accepted, which will include a login ID and password for the webinar. You may access the webinar by tablet, smart phone or PC.)</i>
Participants	Partners; Managers; Supervisors
Competency*	Performance Management, Team Building; Auditing and Assurance, Risk Management and Internal Control; Information Technology.
Sub-competency*	Monitoring and evaluating team performance (developing KPIs), Driving performance, Talent management, Influencing and coaching others; Monitoring performance and accountability, Identifying and managing risks; Data management and analysis, Technology-related upgrades and implementations.
Rating*	Intermediate to advanced level
CPD hours (for each)	1.5

* Details of [Competency and Rating](#) information



About the programme

Recruiting and engaging with staff members (EWEB21110901)

Course outline

Managing a team for high performance begins with recruitment. Recruiting the right staff members, however, has always been a challenge for organizations. This practical webinar aims to help participants to better plan their interview process so that appropriate candidates can be identified, and the key considerations in staff engagement and retention will be shared.

Objectives of the programme – what can participants achieve after joining the webinar?

- Key considerations in designing a competency based interview approach
- Leveraging structured behavioural interviews to identify appropriate candidates
- How to put a team together for high performance
- Understand different generations' expectations for work
- Dos and don'ts when interacting in cross-generation team including millennials and Gen Z
- Learn about coaching leadership for a high performance team
- Help leaders to use both heart (emotional) and head (rational) to communicate and give feedback to team members

Speaker



Ms Catherine Wong, Chief Development Officer, Chorev Consulting International Ltd.

Ms Wong is a dynamic communication trainer and coach, with diverse experience in working with clients from the financial, chemical, professional services, property development, technology, media and transportation industries. Prior to becoming a trainer, she was the Hong Kong office head of a global communications consultancy, leading the local operations with profit & loss and staff development responsibilities.

Ms Wong has coached and trained staff from different levels – from middle managers to C-suite executives on topics related to leadership, communication, change management and transition. She stresses the importance of mindset and behavioural change when working with her clients. Companies that Ms Wong has worked with include: Amadeus, AsiaWorld-Expo, BlackRock, Cathay Pacific, Dow Corning, Dragages, HSBC INVISTA, Prudential, The Hong Kong Police Force, Wyeth Nutrition and Shui On Land.



Preparing for the new Hong Kong Quality Management Standards (*panel discussion*) (EWEB21121001)

Course outline

The International Auditing and Assurance Standards Board released its [new quality management standards](#) to strengthen and modernize how firms approach quality management in 2020. These new standards will raise the bar for quality management across the global audit profession. While [the adopted new standards](#) Hong Kong Standard on Quality Management (HKSQM) 1 *Quality Management for Firms that Perform Audits or Reviews of Financial Statements, or Other Assurance or Related Services Engagements*, and HKSQM 2 *Engagement Quality Reviews* Hong Kong Standard on Auditing (220) (Revised) *Quality Management for an Audit of Financial Statements* will take effect from 15 December 2022 to replace the extant HKSQC 1 and HKSA 220, firms should consider the new standards' implications, devise an implementation strategy and get ready for the transition.

At this webinar, the panellists will focus on sharing their firm's proactive strategies for responding to the new HKSQM1 & 2 and discuss the challenges faced by SMPs and the possible solutions.

Panellists



Ms Michelle Chu, Assurance Director, Moore Hong Kong

Ms Chu is a Director of Moore Hong Kong, with major responsibility in audit and assurance. She serves clients in various industries, companies listed in Hong Kong and specialises in audits of companies listed in the United States. She has also been involved in Sarbanes-Oxley, reverse-merger and de-SPAC exercises for US companies. Her clientele includes financial services, manufacturing & retail, public sector, shipping and technology. Ms Chu is also a member of the Moore Hong Kong Technical Committee and Moore Global Regional Technical Panel.

Ms Chu is a Hong Kong Certified Public Accountant (Practising). She is also a Fellow of the Association of Chartered Certified Accountants and a Chartered Accountant (England and Wales).



Mr Charbon Lo, Partner (Audit and Assurance), Crowe (HK) CPA Limited
CPA (Practising), ATiHK, CTA (HK), BBA

Mr Lo has 15 years' experience in the audit and finance fields. He has extensive exposure in handling audit engagements for small and medium enterprises, as well as Hong Kong Main Board and GEM board listed clients in the industries of property development, catering services, bio-pharmaceutical products, cosmetics, food manufacture, sustainable forest management, gaming and entertainment, etc. with operations in different countries including Mainland China, Hong Kong, Japan, Macau, Brazil, Russia etc.

Mr Lo also works on special engagements such as IPO projects and due diligence reviews.

Moderator



Mr Jeffrey Chan, Chairman, Small and Medium Practices Committee Working Group on Practice Management, HKICPA
FCPA (Practising)

Mr Chan is currently the Partner Audit of Grant Thornton Hong Kong Limited. He has more than 20 years' experience in serving companies operating in Hong Kong, mainland China and overseas markets. His clients cover a wide variety of industries including manufacturing, trading, shipping, property development, construction and retailing. He has involved in various transaction support assignments.

Mr Chan is a Certified Public Accountant (Practising), and is also a fellow of the Association of Chartered Certified Accountants and a fellow of the Hong Kong Institute of Certified Public Accountants.



Automation and analytics: digitization beyond ERP for additional value (EWEB21121601)

Course outline

Automation can start small but make huge differences for organizations. Automation technology is being applied across organizations to Finance & Accounting, Operations, and other areas. Organizations are seeing large returns on investment on these projects but it's important to understand the capabilities of the technology and appropriate uses.

Analytical capability is more important than ever as data is now one of the more valuable assets of organizations. And that data is growing fast – both inside and outside of the organization. There are different levels of analytical capability and each adds value in different ways and may use different technologies.

In this webinar, the speaker will focus on providing a learning foundation for automation & analytics in modern organizations and topics include:

- Trends in automation technology
- How these trends are being applied to finance & accounting, operations and planning
- Levels of analytics capabilities and the technology required
- The intersection of automation and analytics

Speaker



Mr Ricky Leung, Practice Manager, ONE Pacific Limited

Having served the world's most prestigious clients in consulting practice, Mr Leung is a double-certified Oracle NetSuite ERP Consultant and Project Manager who generously offers his top-tier professional insights for finance and business management.

[ONE Pacific](#) is an award-winning solution provider of Oracle NetSuite and Workato and experienced in helping clients translate the benefits of automation into business success.



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