



Practice Management Series for SMPs

(November - December 2022)



Hong Kong Institute of
Certified Public Accountants
 香港會計師公會

Practice Management Series for SMPs

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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	Speaker / Panellists
Retaining Talents in Hong Kong and Hiring Trends 2022 - 2023 (EWEB22110901)	Wednesday, 9 November 2022 12:30 p.m. – 2:00 p.m.	<p>Ms. Hayley Law Associate Director, Michael Page International (Hong Kong) Limited</p> <p>Ms. Nicole Hui Manager, Michael Page International (Hong Kong) Limited</p>
Putting the “Success” in Succession Planning (panel discussion) (EWEB22120902)	Friday, 9 December 2022 6:30 p.m. – 7:30 p.m.	<p>Hon Edmund Wong Legislative Council Member (Accountancy Functional Constituency) Chairman, Small and Medium Practices Committee (SMPC), Hong Kong Institute of Certified Public Accountants (HKICPA) Chairman, SMPC Working Group on Cooperation with Mainland SMPs, HKICPA</p> <p>Mr. Gary Poon Deputy Chairman, SMPC, HKICPA Chairman, SMPC Working Group on Technical Issues, HKICPA</p> <p>Mr. Thomas Lee Member, SMPC Working Group on Practice Management and Digitalization, HKICPA</p> <p>Mr. Jeffrey Chan (Moderator) Chairman, SMPC Working Group on Practice Management and Digitalization, HKICPA</p>

Digital Transformation Strategy – Success Stories and Lessons Learned (EWEB22121403)	Wednesday, 14 December 2022 12:30 p.m. – 2:00 p.m.	Mr. Jason Yau Member, SMPC Working Group on Practice Management and Digitalization, HKICPA
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Language	Cantonese (supplemented with English for technical terms)
Format	Webinar
Fee (for each session)	HKICPA member or student or IA: HK\$160 Non-member: HK\$360 <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*	Business Planning and Strategy, Change Management, Information Technology
Sub-competency*	Developing and implementing strategic actions, Communicating, managing and evaluating strategic plans, Developing plans, evaluating and managing change initiatives, Executing and supporting change initiatives, Technology-related upgrade and implementations
Rating*	Intermediate to advanced level
CPD hours (for each session)	1.5 for (EWEB22110901 & EWEB22121403) 1 for (EWEB22120902)

* Please refer to the [Institute's online CPD Learning Resource Centre](#) for descriptions of competency and rating.

About the programme

Retaining Talents in Hong Kong and Hiring Trends 2022 – 2023 (EWEB22110901)

Course outline

With the pandemic forcing home life and work life into the same physical space for a significant period of time, a spotlight has been placed on how people view not only their work, but their lives as well in a more holistic manner. Employees are re-evaluating what constitutes quality work life, and they want it to be purposeful. According to recent findings, a significant 69% of respondents in Hong Kong are willing to accept a lower salary or forgo pay rise and/or promotion for better work-life balance, overall well-being and happiness.

Hong Kong as an international city thrives on having diverse talent in different corporates including small and medium sized practices (SMPs). In recent years, we have observed an increase in staff turnover among different industries as well as an exodus of talents who are seeking job opportunities in Singapore, London, etc.. Talent retention has thus become a hot topic.

In this seminar, Hayley and Nicole will talk about talent retention strategies including topics such as upward mobility, upskilling, flexibility, and diversity for SMPs in Hong Kong. The speakers will also talk about the hiring trends in different industries to help SMPs build a winning talent strategy for their company.

Speakers



Ms. Hayley Law
Associate Director
Michael Page International (Hong Kong) Limited

Ms. Law graduated from Economics and Finance at The University of Hong Kong. She began her first job at DBS as a Management Associate. Hayley is currently an Associate Director at Michael Page, responsible for recruiting middle to senior level personnel in Financial Services including Corporate and Investment Bank, Insurance, Securities firms, and the FinTech field (including Blockchain & Digital Assets).



Ms. Nicole Hui
Manager
Michael Page International (Hong Kong) Limited

Ms. Hui graduated from Global Business Studies at Chinese University of Hong Kong. She interned at Deutsche Bank and began her first job at Citi as an ICG Management Associate, rotating across Investment Banking, and Private Banking. Nicole is currently a Manager at Michael Page, specializing in the Accounting & Finance team. She is responsible for recruiting senior level personnel in listed companies.

About the programme

Putting the “Success” in Succession Planning (panel discussion) (EWEB22120902)

Course outline

Why is succession planning so important? There are many examples of organizations that experienced an unsuccessful transition after the departure of an executive leader.

To address these types of leadership challenges looming over organizations, succession planning is an effective strategy used by businesses and across industries.

To further help organizations in understanding the importance of succession planning and prepare them to undertake the process, speakers will share their experience on succession planning on the following topics in this panel discussion:

- The challenges faced during the succession process
- The value-added areas in accounting
- Options of succession planning
- Suggestions for CPA Practices on succession planning

Speakers



Hon Edmund Wong
Legislative Council Member (Accountancy Functional Constituency)
Chairman
Small and Medium Practices Committee (SMPC), Hong Kong Institute of Certified Public Accountants (HKICPA)
Chairman
SMPC Working Group on Cooperation with Mainland SMPs, HKICPA

Mr. Wong is currently Legislative Council Member (Accountancy Functional Constituency), and Chairman of the Small and Medium Practices Committee of the Institute, as well as Practising Director of Patrick Wong CPA Limited.

Mr. Wong is experienced in corporates services and practice management.



Mr. Gary Poon
Deputy Chairman
SMPC, HKICPA
Chairman
SMPC Working Group on Technical Issues, HKICPA

Mr. Poon is currently a Partner of Poon & Co. He specializes in serving clients in the financial, real estate and non-profit seeking sectors. He was appointed to be a member of the Financial Reporting Council Review Panel by the HKSAR Government and was a Council member of the Hong Kong Institute of Certified Public Accountants (“HKICPA” or “Institute”). He has served in various committees of the Institute including as Deputy Chairman of the Small and Medium Practices Committee and member of the Qualification and Examinations Board.

Mr. Poon is a practising member of the HKICPA, Chartered Financial Analyst, Certified Tax Advisor and member of several other professional accounting bodies in Canada, the U.S.A. and Australia.



Mr. Thomas Lee
Member
SMPC Working Group on Practice Management and Digitalization, HKICPA

Mr. Lee is a Partner of Lee, Au & Co. He has more than 20 years in the audit industry. He interned at Jardine Fleming (now JP Morgan) and began his first job at KPMG. He joined his father's audit firm in 2008. Since then, he and his father have partnered together to expand their business to other non-assurance sectors such as UK tax advisory, outsourced HR solutions, property agency and talent recruitment.

Mr. Lee graduated from Accounting and Finance at the University of Warwick and later obtained a second bachelor's degree in Chinese law at the Tsinghua University and Master of Business Administration at the Royal Holloway, University of London.

Moderator



Mr. Jeffrey Chan
Chairman
SMPC Working Group on Practice Management and Digitalization, HKICPA

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 been 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.

About the programme

Digital Transformation Strategy – Success Stories and Lessons Learned (EWEB22121403)

Course outline

This webinar will cover the success stories and lessons learned surrounding the key pillars of digital transformation: people, process, technology, and data. A number of case studies on enterprise resource planning (ERP) implementation will be discussed. The speaker will cover some of the key considerations surrounding the four strategic areas in a digital transformation project below:

1. People – User requirements vs adoption success level
2. Process – Customer's business flow vs industry best practices
3. Technology – Best-of-breed systems vs full suite ERP
4. Data – Finance vs operational data

Speaker



Mr. Jason Yau

Member

SMPC Working Group on Practice Management and Digitalization, HKICPA

Jason Yau is the Asia Pacific Regional Leader of RSM International and the Head of Technology of RSM Hong Kong with 18 years of auditing and consulting experience.

As Regional Leader for Asia Pacific, Jason works closely with RSM member firms in implementing global strategy within the region, including brand, client service, marketing, business development, training, service offerings and succession planning. He also serves on a number of RSM global committees and task force, including:

- Global Digital Advisory Committee
- Global Innovation Committee
- Global Financial Services Committee
- Global Strategy Taskforce – Action Learning Group

Jason has been with RSM since 2004 and was a member of RSM US global expat team before joining RSM Hong Kong in 2016. He was originally based in RSM New York office providing audit and consulting services to financial institutions and asset management companies. Other than the regional role, Jason currently leads the Technology and Management Consulting division in providing IT assurance, security and privacy and digital transformation services for regional and global clients.

Jason is a US Certified Public Accountant (CPA) and Certified Information Technology Professional (CITP) by the State of New York, a member of the American Institute of Certified Professional Accountants (AICPA) and the Hong Kong Institute of Certified Public Accountants (HKICPA) and its Working Group on Practice Management and Digitalization, a fellow member of both the Chartered Institute of Management Accountants (FCMA) and the Chartered Global Management Accountant (CGMA).



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