A STRATEGIC CPA'S GUIDE TO ORGANIZATIONAL DRAG

From Drag to Drive

1 UNDERSTAND THE SYMPTOMS

Undetected Pain Points
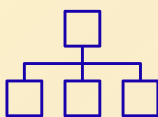
Why are inefficiencies sliping through?

Tech Debt

Am I being efficient with the tools I have?

Unclear Decision Rights

Who should make this decision?

Excessive Meetings

Do we need another meeting?

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lost globally to organizational drag

2 WHY FIX IT?

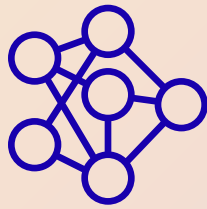- **LACK OF MOTIVATION** Excess meetings limit quality of work

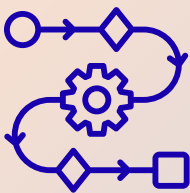- **LOSS OF DIRECTION** Unclear accountability results in delays and losses

- **INCREASED PERSONAL LIMITATIONS** Employees are not adding value
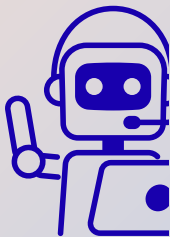
3 CHOOSE AN AI-BASED CURE

Machine Learning to identify undetected patterns

Invest in Automation to reduce repetition

Have AI supplement decision frameworks

AI Meeting Assistants

4 MINDSET

- Upskill and experiment with AI to enhance judgement

- AI is a tool and will not replace you

5 ROUTINE CHECKUPS