



EAI 2030

Investing in our Future

EAI International's Strategy for 2025-2030

Forward and Vision

In 2024 EAI International's Board agreed to undertake a comprehensive strategy exercise that would provide a **Vision for 2030** - a new strategy that would help it realise its ambition of being:

'The global association of agile firms, with international focus, recognised and valued by peers and clients alike.'

In June, at the Dublin conference, participants agreed the business landscape had changed dramatically in 30 years, and that the pace of change was happening faster than ever. Put simply, EAI International (EAI) needed to change how and what it did to meet the associated challenges to best serve its members. Building on the feedback from the Dublin workshop the researchers created a comprehensive set of questions to get feedback on current products and services and crucially, support the development of a new member-led strategy. In total 86 members representing 67 member firms took part. This exercise alone equates to more than 100 hours of member feedback. The research team and the Board are extremely grateful for the genuine contributions of all of those who took part.

Further feedback, refinement and prioritisation was provided by the Board, Executive Management Committee and members of The Academy during their inaugural autumn meeting.

The summary of this research, which all members have access to, informed the new strategy. Key themes that emerged from the research correspond directly to our high level objectives - what and how we will deliver.

Themes:

1. Ambition of being a global organisation.
2. Brand and communication (at all levels) should be a focus for improvement.
3. EAI members enjoy learning, working collaboratively with each other and recognise the diverse skills of others.
4. Governance, including internal communications and sustainability, will need alignment with the new strategy.

Our objectives (pillars):

1. **Strengthening our community:** We are strong and connected - globally representative and engaged.
2. **Creating measurable impact:** We are recognised and sought after broadly.
3. **Investing in our professional future:** We are valued through our expertise.
4. **Delivering our plan:** We have robust governance and systems to enable us to deliver.

The result is a new vision for EAI, a refreshed mission, purpose and set of values. The comprehensive strategy has used the above themes as inspiration to define a set of actions and investment for the coming years.

“ *EAI International has a proud heritage of friendly professional collaboration and comradery. EAI 2030 builds on this ethos to ensure a brighter future for us all.* ”

Yves Marguerat, Fidexaudit, Switzerland (former Chair)

“ *By investing in our younger members, ensuring our brand, communications and content is current and relevant, and our resources are realigned to meet member needs, we will ensure that we have a sustainable and prosperous association.* ”



Doris Moraschi, bmi auditax, Germany (Chair)

The Foundation - EAI's Values

Values are a shared set of beliefs that guide behaviour. For EAI these values have provided a foundation for the association and all its members throughout its history. Given feedback, they have been updated to better reflect the current environment in which EAI's members work.

Value	Old	New
Trust	Each member undertakes to build relationships based on professionalism, trust, respect and equality.	We know we can depend on each other. We expect our colleagues to commit to providing reliable and professional support for clients.
Respect	A multicultural association founded on mutual respect.	We are an open-minded association, no matter where someone comes from everyone treats each other equally, with generosity and kindness.
Collaboration	Our members share a common goal to share ideas, expertise and projects to benefit us all.	We are there for each other as colleagues and as friends sharing more than expertise and ideas. This benefits our members but also our clients.
Independence	Our independent firms are independent and regulated by their own jurisdiction.	We are an association of independent firms and exist in our own jurisdictions. Each of us is committed to privacy and confidentiality.

Our values are the foundation of our connectedness. During their first meeting in September 2024, The Academy participants redefined ‘collaboration and trust’ in bold, new ways!



Along with our new Vision (where we want to go) and our Values (our foundation) we have refreshed our Mission and Purpose. Key to this is ensuring our clients receive consistent, high-quality service no matter where they are in the world. To achieve this we need to develop and grow in terms of our reach but also as individuals professionally.

EAI’s Mission

Our mission describes what EAI International does, who it serves and its approach to reaching those objectives:

‘At EAI we connect and support our members across the world to develop our businesses and enhance the delivery of services to clients.’

EAI’s Purpose

Our purpose describes why we exist and what we believe.

‘(We believe in) providing the best international service to our clients through our trusted and friendly professional colleagues.’

Our high-level objectives (our pillars)

Using the 4 themes that came out of the research we have defined four pillars - these are areas of work for EAI, that, when realised, will support the delivery of the Vision.

As a member-led organisation, there will be opportunity to get involved to ensure that these are delivered in a structured way. There are many activities that fall under each pillar, and the Board and Executive Committee will use this document to set priorities for each year. These, when delivered, will provide measurable progress for the EAI International.

This is our current view from 2024 and as EAI evolves, so too might the priorities.

Strengthening our community

Objective 1: We are strong and connected - globally representative and engaged

Focused objective	Key deliverables	How/ why?
We are represented in all countries by quality firms within our traditional professional sphere.	Recruitment of new members in priority regional areas include North America, Asia, Middle East, Eastern Europe, Latin America and Scandinavia. Conduct due diligence, feasibility study for MRAP and others to determine next steps.	Establish Membership Committee to focus exclusively on research, approach, peer review, recruitment and on-boarding. Define a programme of work with targets, timelines and pitch design. Mergers should be considered if there is a high prospect of synergy.

<p>We maintain our strong sense of community by actively engaging and supporting each other.</p>	<p>Deliver a balance of activities that support engagement across the globe.</p> <p>Reiterate obligations to fellow members in terms of responsiveness.</p>	<p>Deliver a schedule of events that is inclusive and sensitive to time zones.</p> <p>Deliver active support programme (buddy system) especially for those members who are new/ live outside of Europe.</p> <p>Create an internal service level agreement that ensures all queries are responded to within a designated time frame.</p>
<p>We create mechanisms that enable us to collaborate more effectively and efficiently.</p>	<p>Update our CRM and membership portal to include refreshed member contacts, market and technical expertise.</p>	<p>To facilitate collaboration, business development, research and secondments. All members to take responsibility to respond in a timely manner and contribute to collection of data.</p> <p>Promote new member profiles, introductions through 1-2-1 meetings and introduce a ‘buddy’ system for members of 1-5 years.</p>
<p>We serve our clients more comprehensively by</p>	<p>Identify and re-engage with ‘sister’ law associations.</p>	<p>Establish a Partnership Working Group who take</p>

<p>actively collaborating with those who are outside our profession or membership.</p>	<p>Clearly define new 'affiliate' membership for those who can support us and our clients' needs.</p> <p>Explore working with new types of firms in the commercial and consulting ecosystem who can provide different services to clients.</p>	<p>responsibility for research, identification and prioritisation for these different opportunities.</p> <p>Create targets and timelines and appropriate agreements.</p>
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“ Our strategic vision - being the leading association of agile firms, means that we will focus on key priority areas for delivery as outlined in the strategy. ”

Adam Honan, Millview Advisory, Ireland

Creating measurable impact

Objective 2: We are recognised and sought after broadly

Focused objective	Key deliverables	How/why?
<p>Our renewed brand is easily recognised and actively followed:</p> <ul style="list-style-type: none">• by clients - as a trusted partner• by peers - as a standard of quality• by employees - as an innovative and inclusive employer	<p>New brand developed and delivered utilising the strategy, values and inclusive ethos of EAI to maximise impact.</p>	<p>Using the comprehensive research results from 2024, work with an independent specialist to focus on key messages and modernise the look and feel of the brand.</p>
<p>Our external communications are more frequent, valued and shared throughout our community: clients, peers and employees.</p>	<p>Create a comms strategy which includes a calendar of defined themes, announcements and designed content (technical and case studies).</p> <p>Encourage member firms and their employees to develop and share content created.</p>	<p>Reinforced, consistent messaging and design across multiple platforms will increase awareness and engagement across all stakeholder groups.</p> <p>Utilise automatic translation features in programmes like Mailchimp for newsletters to personalise member experience.</p>

<p>Our member firms are sought out by potential new clients and those seeking employment.</p>	<p>Deliver new website in new brand which features real members and showcases the genuine community and expertise.</p>	<p>In the design, ensure that specifications meet a all stakeholder requirements and showcases the genuine diversity of the membership.</p>
<p>Larger government and international agency tenders become feasible for member firms to collaborate.</p>	<p>Explore new opportunities through better CRM data, coordination and brand recognition.</p>	<p>High profile government/agency contracts become feasible when skills of local players are combined with those from the rest of the membership</p> <p>Create task force to explore once CRM updated.</p>

“ *New communication platforms including brand, website and content, will make us far more attractive and demonstrate our inclusivity as an association. This will support our growth and diversification plans into new regions.* ”

Ruby de Vries, Hoesel, The Netherlands

Investing in our professional future

Objective 3: We are valued through our expertise

Focused objective	Key deliverables	How/why?
<p>We support our members through development programmes that are technically robust and innovative.</p>	<p>Identify global topics for learning and expertise for delivery at global conferences.</p> <p>Develop regional activities that focus on specific issues unique to a region using experts within the membership. Examples to help develop real solutions.</p> <p>Develop case studies with solutions as examples for learning.</p>	<p>Create Content and Research Committee with global representation to lead on learning priorities for members. These include global topics as identified in the research as well as local issues for specific regions.</p> <p>CRC to also identify experts who can support this learning inside and outside EAI International.</p>
<p>We collaborate to develop research and other content that is unique, timely and highlights our expertise.</p>	<p>Deliver research reports created by members for members and clients.</p> <p>Leverage content from those bigger than us (big 4) and signpost and don't re-create.</p> <p>Create partnerships with professional bodies in different regions to curate</p>	<p>CRC to identify topics for research groups. Capitalise on the value derived from doing research together with all members benefitting from the frequent and unique content.</p> <p>By supporting and collaborating we</p>

	content and identify expertise for our learning.	strengthen the bonds and expertise of our membership.
<p>We embrace the knowledge and mindset that younger members of our firms have and integrate that into our development outputs.</p>	<p>Integrate more actively into governance structure - providing more opportunities to participate.</p> <p>Deliver pilot 'boot camp' and programme assessment for the new Academy.</p> <p>Explore potential specialist conference for younger members or more actively integrate in to global conferences.</p>	<p>New, fresh ideas and challenge are part of the fabric of the organisation and should be embraced.</p> <p>Younger members attract new/different clients into firms.</p> <p>Provides younger members opportunities to develop and create networks.</p> <p>Creates an emotional connection with EAI that will support a sustainable future.</p>

“ *At EAI International we pride ourselves on technical excellence and want to ensure our members are constantly learning and sharing research and knowledge.* ”

Leo and Elsa Rios, CPC Accounting, USA

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EAI is a platform for professionals to exchange ideas, learn from each other and share views to achieve a win-win in the end. With the new strategy we will be able to structure and enhance that engagement to help members from all over the globe to do this more effectively.

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Eileen Liang, Shanghai Transventure Business Consulting Co, China

Delivering our plan

Objective 4: We have robust governance and systems to enable us to deliver

Focused objective	Key deliverables	How/why?
<p>Sustainability - we ensure that our limited resources are used effectively.</p>	<p>Transition away from all printed materials and in-person translation and reinvest in digital formats.</p> <p>Deliver sessions on sustainability and different reporting structures so that members can capitalise on the opportunities that it brings.</p>	<p>Use appropriate technology platforms to enable greater connectivity and inclusion (e.g. AI translation) at conferences and digital programmes, research reports.</p> <p>Identify experts who regularly work with sustainability and audit to help support learning.</p>
<p>Governance is reviewed and aligned with the delivery of the new strategy and promotes greater transparency and accountability.</p>	<p>Prioritise all workstreams and align with strategy.</p> <p>Ensure recruitment of members into the governance structure comes with clear definitions of responsibility, has a defined process and is fully transparent.</p> <p>Integrate all generations into all forms of</p>	<p>Create new terms of reference for committees (some of which may be new) that define objectives, deliverables and time frames for each.</p> <p>Ensure all governance positions are advertised, fulfil skills requirements come with defined terms.</p>

	<p>governance as well as ensure that all parts of the world have a voice.</p> <p>Improve communication from the board and all working committees to the membership</p> <p>Reiterate obligations of membership to all new members.</p>	<p>Be mindful when meetings take place to be as inclusive as possible, for all of the global membership.</p>
<p>Internal communications becomes as important as external communications in supporting the organisation</p>	<p>Internal newsletters are designed to come out with greater and more regular frequency.</p> <p>Internal communications plan to report against targets, including financial transparency.</p> <p>Regular surveys are deployed to support more frequent member feedback.</p>	<p>Dedicated resource is identified to support Secretary and be the custodian of both internal, external communications and brand.</p> <p>Highlight activities of Board/Committees so that members can monitor and celebrate progress.</p> <p>The membership feedback is valuable to ensure member needs are being met.</p>
<p>Administrative effectiveness and efficiency is reviewed to include roles / responsibilities and resource capacity.</p>	<p>Review the role of the Secretariat in the light of the new strategy and identified priorities</p>	<p>Ensure that objectives are clear and manageable.</p> <p>Channel funds from redundant activities to those with greater impact.</p>

	Explore additional resource to focus on communication and regional support.	
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“ Delivery of our ambitious strategy means ensuring that our resources are allocated in an appropriate and sustainable way. ”

Yves Boutruche, Cocerto, France

“ The proposal to integrate younger members into all aspects of the organization, including the governance structure, bodes well for the future of EAI. ”



Erik Herkstroter, Graham Smith, The Netherlands

Strategy on a page



The complete strategy can be summarised in the diagram above representing the interdependencies of the different elements. Therefore, if the Vision is to be realised, all of the elements need to be delivered.

“ *We will build EAI’s future, together.* ”



Eric Mercanton- Malikov, Chief Administrative Officer, EAI International

Conclusion

This is an ambitious but achievable plan, which will be delivered with everyone’s help. Collective responsibility and responsiveness are the foundations of the delivery. As a member-led organisation there are many ways to get involved, whether through the governance structure, research groups or utilising social media skills to create and share content more widely.

We now have a clear plan for the next five years including our growth, how we promote ourselves and communicate, how we develop ourselves and invest in our younger

members. Finally, we will ensure our financial resources are being used for the greatest impact.

This is an exciting time for EAI and for those who wish to join this inclusive community. We are the 'home' for agile firms who can adapt to changing market dynamics and put their clients at the heart of what they do. Members now have a platform to flourish and prospective firms, incentives to join.

“ The Academy is fully in line with the desire of the Board to integrate young professionals into the Association and to ensure the continuity of collaboration between members. ”

Member of The Academy

Research and strategy development team:

Jerome Moyemont-Singer, Marketing and Communication Manager, EAI International

Memoria Lewis, Director, [ML Consultants](http://www.mlconsultants.co.uk) (www.mlconsultants.co.uk)

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