



IMA Fiscal Year 2018 in Review: Leading in the Digital Age

A recap of events and milestones during the year ending June 30, 2018



The Association of
Accountants and
Financial Professionals
in Business



Thoughts from
Alex Eng, CMA, CFM, CPA
IMA Chair, Fiscal Year 2018

Thoughts from the Chair



Today IMA counts seven offices around the world (with a new one opening soon in India). I have been lucky enough to visit many of them this past year as Chair. I see great enthusiasm for management accounting around the world.

My travels around the world this past year at IMA have shown me the global enthusiasm for management accounting. It has been such an honor to serve as IMA Chair during this global expansion.

Today we collaborate with partners like the Institute of Directors India on research about the state of the finance function and celebrate International Management Accounting day in China and around the world. At our Annual Conference & Expo in Indianapolis we recognized a team from Vietnam for their winning entry in our global video contest. IMA's perspective on management accounting is enriched by the diversity of our organization.

IMA is comprised of people with different backgrounds and viewpoints who share a commitment to advancing the management accounting profession with trust and integrity. This past year as your Chair I have seen firsthand the positive trajectory IMA has had on people's professional and personal lives.

Closing out 2018, I want to say thank you for the privilege of serving as your Chair. It has been a transformative and rewarding experience and I am so proud to be a lifelong member of this organization.

Alex C. Eng, CMA, CFM, CPA
Chair, 2017 - 2018

Leading in the Digital Age



- **Sustained Growth** = Over 39,000 new CMA candidates and 6,000 new CMAs.
- **Member-centric Innovation** = New educational products and services and an improved digital user experience.
- **Culture of Service** = Community that supports diversity and making a positive social impact.
- **Focus on Future-readiness** = Launched “Series of the Future” video chats, Tech Talks, and Excel data analytics courses.



“CMA First” Focus



Open New
Doors with
the CMA

Take charge
of your career
today

Visit cmacertification.org

CMA®

- CMA First message strategically deployed across communication channels
- Targeted email marketing to cultivate new audiences for the CMA and convert prospects into exam takers
- Message reinforced by award-winning creative
- Second year of success in growing global CMA pipeline

Golden Thread of Value

How We Achieve Our Strategic Goals*



Sustained Growth

Sustained Growth

Double-digit, volume growth in membership (24% year over year)

- Surpassed symbolic 100,000 global member milestone
- Student membership grew 39% year over year

Healthy year over year CMA growth rates

- New candidates (52%)
- Exam registrations (59%)
- New CMAs (47%)

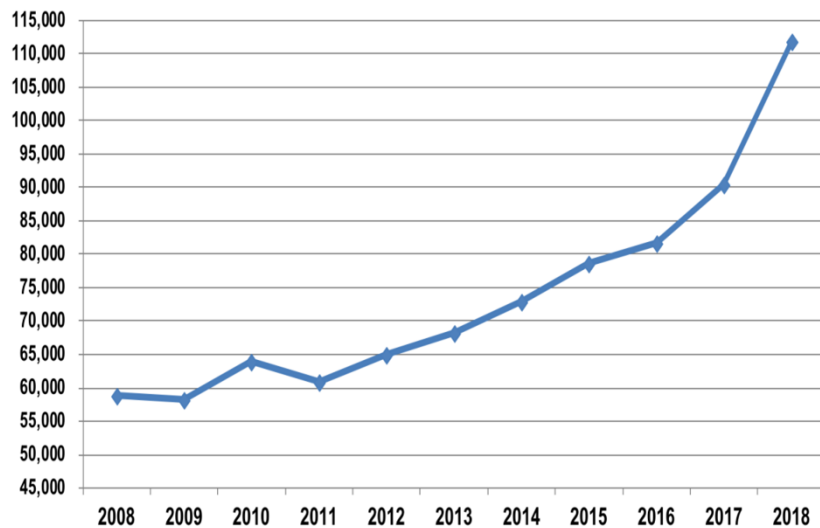
Focus on making members “future-ready”

- Enhanced Management Accounting Competency Framework
- New specialty credential, Certified in Strategy and Competitive Analysis® (CSCA)
- IMA Excel: Data Analytics – Leveraging Excel
- Tech Talk Webinars with leading thought leaders in digital transformation
- Thought leadership based on original research



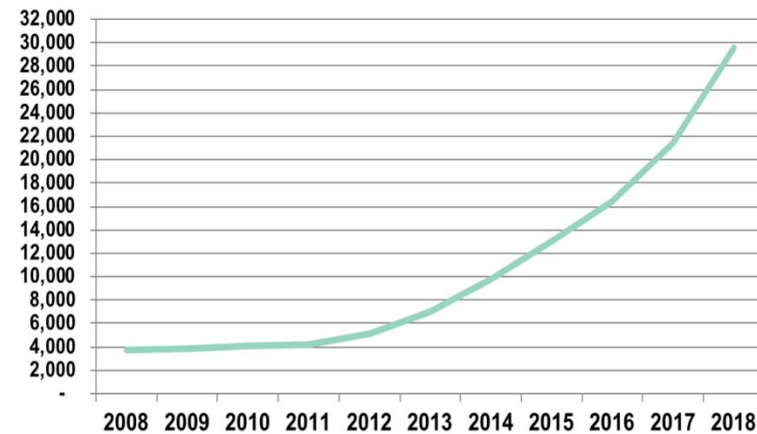
Sustained Growth – cont'd

Total Global Members*



*111,866 as of June 30, 2018

Student Members*

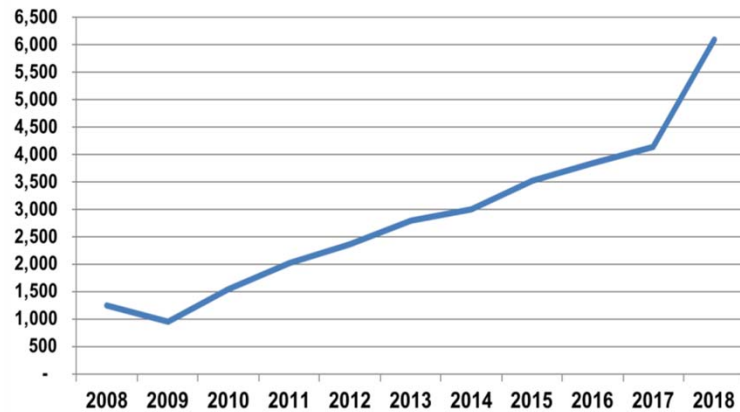


*29,503 as of June 30, 2018



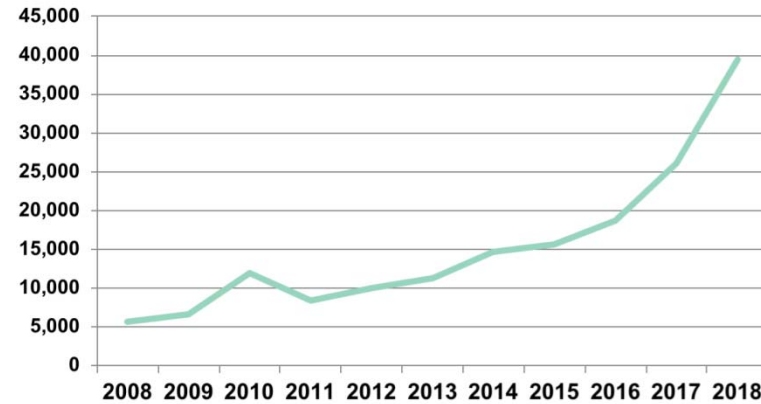
Sustained Growth – cont'd

New CMAs*



*6,093 as of June 30, 2018

New CMA Candidates*



*39,516 as of June 30, 2018

The Virtuous Cycle Behind IMA's Growth



Member-centric Investment

Enhanced Competency Framework



- Leadership is at the core
- To meet the changing demands of the profession, new competencies added in:
 - Strategic Management
 - Data Analytics
 - Data Visualization
 - Data Governance
- New domain in Professional Ethics and Values

New Products and Services



A New *Specialty* Credential for CMAs

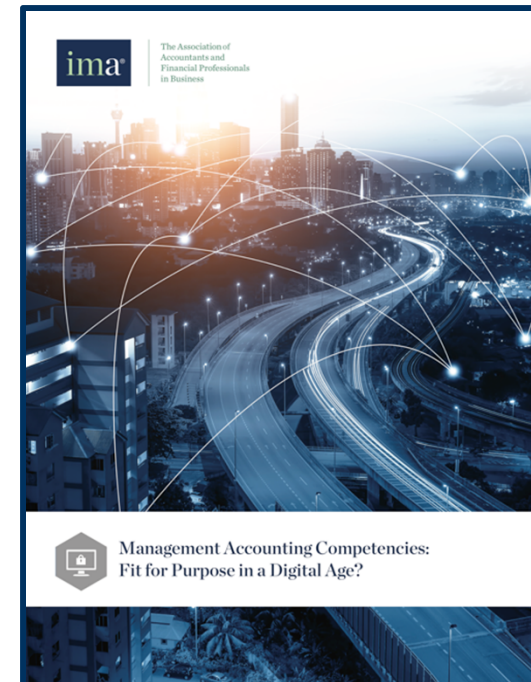
The CSCA® (Certified in Strategy and Competitive Analysis)

Enhance the CMA® certification by focusing on strategic planning, competitive analysis, and decision making.

Strategic Analysis | Creating Competitive Advantage | Strategic Implementation & Performance Evaluation

Visit www.imanet.org/CSCA to register!

CSCA | Certified in Strategy and Competitive Analysis

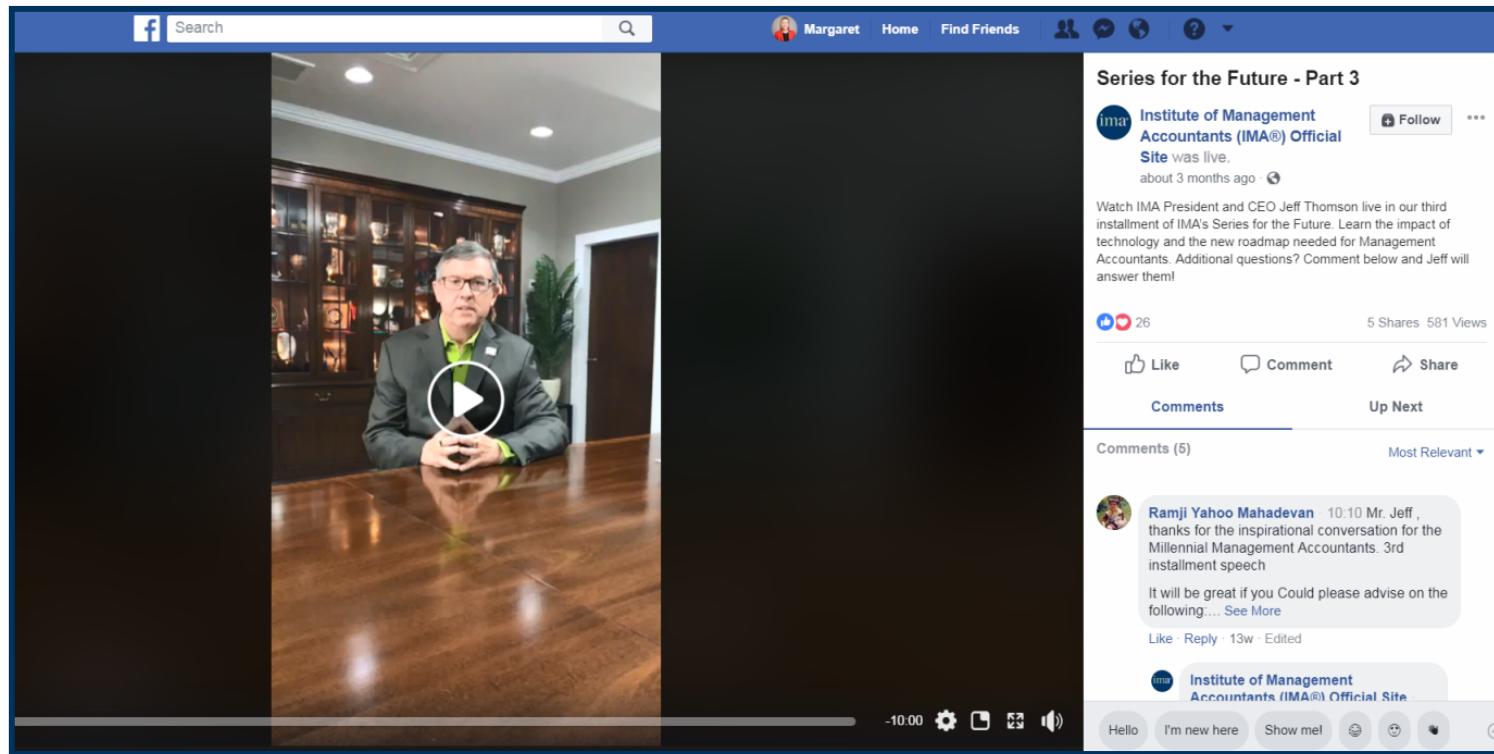


ima® | The Association of Accountants and Financial Professionals in Business

Management Accounting Competencies: Fit for Purpose in a Digital Age?

- New Certified in Strategy and Competitive Analysis (CSCA) specialty credential
- Expanded thought leadership and research in the area of digital competencies

New Platforms and Programs



“Series for the Future” video talks with Jeff Thomson livestreamed on Facebook

China WeChat (China’s most popular social media site) Education Products



Culture of Service

Employees Create Impact



Red Nose Day, May 20, 2018

Employees wore red noses and made donations to anti-child poverty campaign



Make-A-Wish Sponsorship

Employees raised over \$6,000 for Make-A-Wish child Solei to reunite with her extended family in Switzerland

Diverse IMA Community With Global Vision



Unwavering Support from Our Volunteer Ambassadors

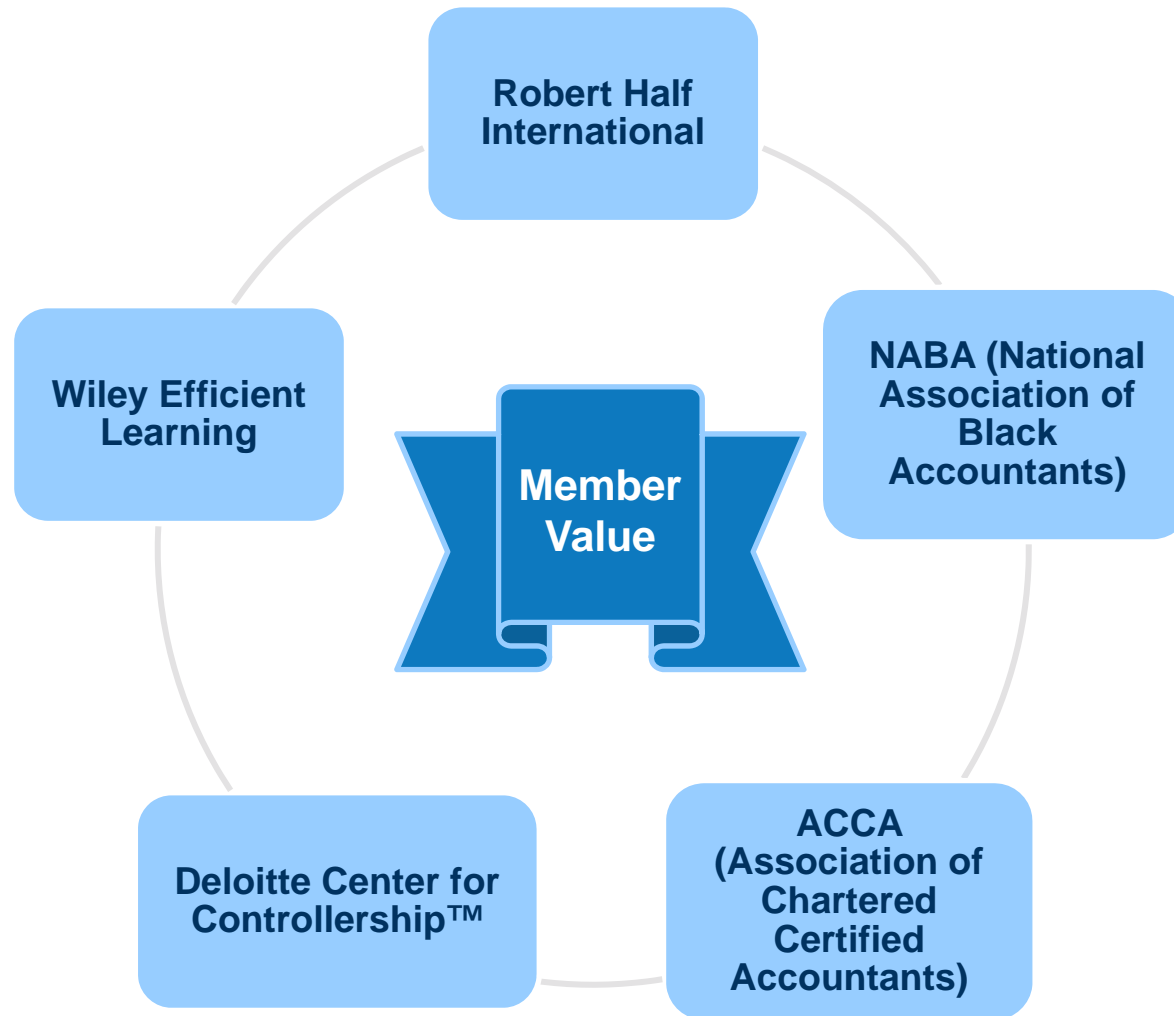


Women's Accounting Leadership Series



New York (October) and Amsterdam (March) Women's Accounting Leadership series events provided networking opportunities to women who want to further develop leadership skills and strategies for advancement in the accounting profession.

Partnerships Deliver More Value to Members



IMA Membership in External Committees on Behalf of the Profession

COSO (Committee of Sponsoring Organizations of the Treadway Commission)

Dedicated to providing thought leadership through the development of frameworks and guidance on enterprise risk management, internal control, and fraud deterrence

IFAC[®] (International Federation of Accountants)

Dedicated to serving the public interest by strengthening the profession and contributing to strong international economies

IIRC (International Integrated Reporting Council)

Dedicated to promoting communication about value creation as the next step in the evolution of corporate reporting

Focus on Future-readiness

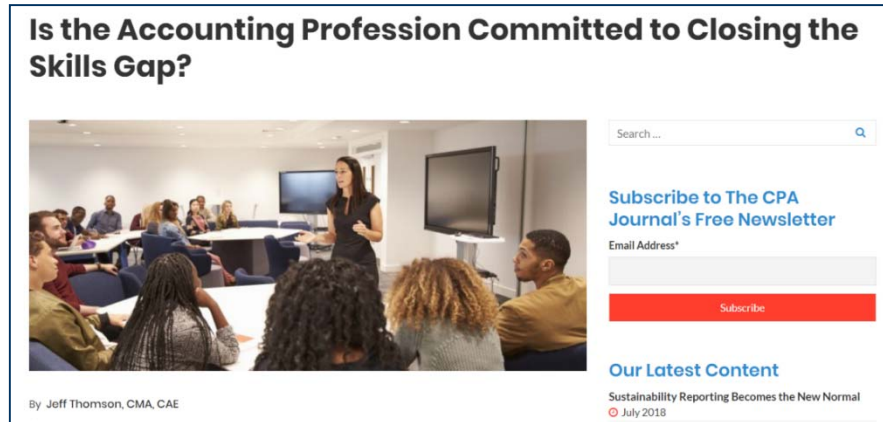
Award-winning Integrated Marketing Campaign



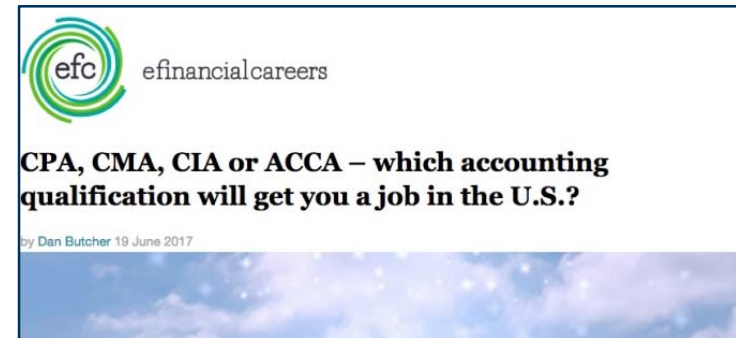
Paid Media



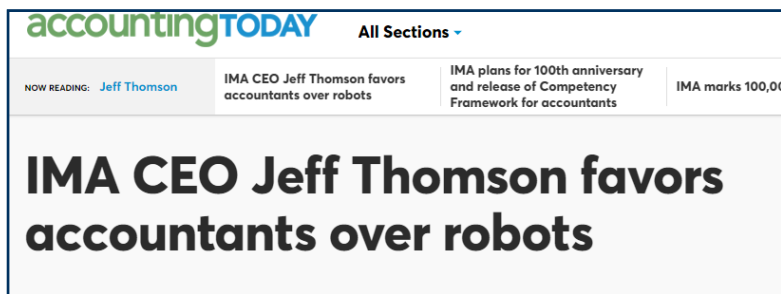
Earned Media



CPA Journal, October 2017



Efinancial.com, June 2017



October 2017



Awards



Recognition by The Accountant/International Accounting Bulletin as 2017 Professional Body of The Year

Other awards of note:

- PRSA-NJ Pyramid Awards
- Gold Award in the Excel Awards from the Association of Media and Publishing
- Hermes Creative
- Astrid Awards
- APEX Awards

Launch of 100 Year Anniversary Microsite

www.ima100years.org



IMA Century Student Scholarship Fund

"My hope is that students who have the right drive and ambition have the opportunity to get a strong educational foundation with the help of others who have taken that path before them." – Ron Luther, CMA, CPA, IMA member since 1975



In honor of 100 years of service and support for the management accounting profession, and a long history of investing in students, we are proud to present the IMA Century Student Scholarship Fund.

Contribute on the 100 Year Anniversary website:
<http://ima100years.org/contribute/>





IMA President and CEO Perspective

IMA President and CEO Perspective



Leading the efforts to prepare members for digitization has been a rare privilege. This organization has proven agile and responsive to the changing needs of the profession.

It is a transformative time in our profession. Robotics, automation, artificial intelligence, and data analytics are not passing trends. Every business professional must pivot towards technology.

This requires the support of community. That community is IMA. IMA's membership now exceeds 110,000. As IMA renews its commitment to prepare its members for the changing demands of the profession, specifically seizing on the opportunities presented by technology, I am confident growth will continue.

The CMA continues to be the most respected, trusted, and fast-growing certification for management accounting. More than 60,000 professionals have earned the CMA since the program's inception in 1972. In fiscal year 2018 over 39,000 new candidates entered the CMA program, an increase of 51.7% from the year prior. This year we awarded over 6,000 CMAs! Our commitment to high standards and our focus on the 11 competencies that add the most value to organizations, has made the CMA attractive to both individuals and organizations. The CMA provides upward advancement to individuals and a deeper bench of expertise for organizations.

Next year we celebrate our 100th anniversary. The steps we take today to become "future-ready" will ensure IMA will be here to celebrate 100 more.

Jeff Thomson, CMA, CSCA, CAE
IMA President and CEO

Vision, Mission, Values

Vision: To be the leading resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals in business.

Mission: IMA's mission is to provide a forum for research, practice development, education, knowledge sharing, and advocacy of the highest ethical and best business practices in management accounting and finance.

Values: IMA's five Global Core Values inform our Mission:

- Respect for the Individual
- Passion for Serving Members
- Highest Standards of Integrity and Trust
- Innovation and Continuous Improvement
- Teaming to Achieve



Diversity and Inclusion Statement

Diversity and Inclusion Statement: The global governance of IMA acknowledges and embraces the diversity of our membership and considers an inclusive atmosphere essential. Through the backgrounds and experiences of our global membership base, we gain perspective and insights that impact the strategic and operational direction of our organization. Our global diversity also provides new ideas and alternative perspectives that expand IMA's contribution to the profession.

IMA enjoys a very diverse membership. Diversity encompasses embracing the various backgrounds and celebrating the uniqueness of each culture within our membership. IMA appreciates that uniqueness and leverages it as an asset wherever possible.

Strategic Goals

Strategic Goals:

- Win additional market share with “CMA First,” an aggressive pipeline building effort and expansion of the CMA in the U.S. and globally
- Drive member retention and loyalty in all regions by delivering tangible value through relevant programs, products, and services
- Raise awareness in the Student / Academic market to expand the membership pipeline and reach the Young-CMA certified Professional of Tomorrow
- Master technology that directly impacts IMA members and our value proposition





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