



PrimeGlobal

*The Association of Advisory
and Accounting Firms*

MEMBER GUIDANCE DOCUMENT

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Member Guidance

By implementing and encouraging best practices and standards, PrimeGlobal creates an environment that supports member growth and leverages membership for business success.

Relationship building is the foundation of PrimeGlobal's success and member value. It requires a commitment by the entire firm pledging great attention to recognizing opportunities and investing in conversations and program offerings.

Initial Integration

Building a strong and cohesive community within PrimeGlobal requires careful planning and implementation of best practices. Below are suggestions on how members can raise firm awareness and realize immediate association benefits.



Firm administrator:

Accurately complete the firm profile using the on-boarding hub and review on My PrimeGlobal. Confirm its completeness to advantageously position the firm.

Require professionals to thoroughly complete individual My PrimeGlobal profiles including industry and service expertise and joining Communities of Practice (COPs).

Provide a quote and necessary information for the press release, working with PrimeGlobal's team to publish in local and national trade publications.

Confirm the firm's leadership and team's participation in mandatory orientation webinars.

Initiate the firm's annual engagement plan discussing participation with department leaders and budgeting for in-person opportunities.

Review with department heads the process for business referrals.

Review with appropriate departments the responsibility of submitting Thought Leadership.





2. Online Platform, My PrimeGlobal:

- PrimeGlobal offers an online platform, My PrimeGlobal, for members to actively participate in discussions, share insights, and connect with professionals globally. Utilize this to seek advice, share best practices, and stay updated on industry trends.
- Ask for input and assistance using the discussion forum on My PrimeGlobal, leveraging the expertise of other association members.
- Likewise, promptly and thoroughly answer forum inquiries, highlighting your firm expertise and insight. These are posted for all members to see and established capability and skill. Create discussion with other firms. Stay connected.
- Leverage firm contacts “likes” and engagement points. “Likes” give individuals and firms recognition and appreciation through a thumbs up. Engagement points are earned by attendance, posting and commenting in My Community, and participating in PrimeGlobal offerings. Both forms of acknowledgement are widely recognized and are directly related to the value received from membership.



- Utilize PrimeGlobal resources, such as industry partnerships and service providers, market research, and best practices guides. Many offer incentive pricing, insightful webinars and thought leadership for PrimeGlobal members.
- Complete your individual My Profile to join Communities of Practice (COPs) and to showcase your top expertise in industries and services. This ensures your profile is searchable in the robust Member Directory.
- Utilize the Member Directory for locating referral assistance, learning, sharing knowledge, professional development, and more. Explore the extent of unique and interesting practices spanning across 100 countries within the PrimeGlobal membership.

3. Collaborative Initiatives:

- Explore opportunities for collaboration with other member firms. Joint ventures, partnerships, or shared projects that can be mutually beneficial.
- Research firms with complementary services to yours, creating opportunities for cross-referrals.



4. Committee Involvement:

- Join committees or working groups within the association that align with your firm's focus. This provides a deeper level of engagement and positions your professionals as experts in specific areas.

5. Thought Leadership and Publications:

- Provide Thought Leadership to publish on My PrimeGlobal and social media. This establishes your firm as a thought leader in the association and the industry.
- Share your publications through the association's channels and leverage them in your marketing efforts.

6. Client Referrals:

- Foster relationships with members who may have clients with needs aligning with your services. Building a network of trusted professionals can lead to client referrals.
- Be open to referring clients to other PrimeGlobal members when their expertise is better suited to meeting specific client needs.



7. Social Media and Online Presence:

- Leverage social media platforms to connect with members, share insights, and promote your firm's achievements, always tagging @PrimeGlobal.
- Maintain an updated and professional online presence, showcasing your firm's expertise and services.
- Broadcast PrimeGlobal membership on social media sites through your PR contacts and on your firm website.

8. Feedback and Continuous Improvement:

- Seek feedback from other PrimeGlobal members and clients. Use this input to continuously improve your firm's services and client interactions.
- PrimeGlobal advocates constructive feedback. We welcome firm feedback and suggestions as we strive to maintain the highest standards and service levels.

By actively participating in all that PrimeGlobal offers and implementing these strategies, your firm can maximize the benefits of networking, gain new business, establish expertise, and contribute to the growth of your firm.



Best Practices & Code of Conduct

PrimeGlobal is a world class, globally recognized advisory and accounting association committed to excellence, integrity, and collaboration. As a member, you play a vital role in upholding the association's reputation for candid interactions, ethical practices, and successful business referrals. The PrimeGlobal By-Laws, Article IV, outlines obligations for continued membership in good standing which members must follow. The Membership Standards (Annex 1 of the Bylaws) also contain requirements regarding responsiveness and behavior.

This Code of Conduct and Best Practices guide is designed to provide additional guidance for professional behavior and to ensure a harmonious and mutually beneficial association for all members.

1. Integrity and Professionalism

- Members shall adhere to the highest ethical standards in all professional activities, demonstrating honesty, integrity, and transparency.
- Members pledge not to knowingly market to or canvass existing clients of other PrimeGlobal firms, but firms may



respond to Requests for Proposal (RFPs), bid documents or requests for service/tender from those clients where the firm is approached without having solicited the approach.
(note: this is a Membership Standard requirement)

- Members pledge not to solicit or recruit staff or partners of other PrimeGlobal firms with the intention of offering employment.
(note: this is a Membership Standard requirement)
- Members are expected to confer with the local PrimeGlobal firm when considering whether to open an office in the local market of another association firm and before finally approving or proceeding to implement any such plans. (note: this is a Membership Standard requirement)

2. Collaboration and Engagement

- Members are encouraged to actively engage in association activities, contributing their expertise and insights to foster a collaborative and knowledge-sharing environment.
- Members shall treat each other with respect and professionalism, valuing diverse perspectives and promoting an inclusive atmosphere within the association.



3. Business Referrals and Networking

- Members shall make business referrals based on merit and the best interests of clients, avoiding conflicts of interest and maintaining objectivity.
- Members should respond to inquiries within two working days regardless of their ability to assist. (note: this is a Membership Standard requirement). If able to accept a business referral from another PrimeGlobal member, it is expected to complete the engagement judiciously and professionally.
- Members are encouraged to actively participate in networking events organized by the association, fostering valuable connections and opportunities for collaboration.



4. Continuous Professional Development

- Members shall invest in continuous professional development, staying current with industry trends, technologies, and best practices.
- Experienced members are encouraged to mentor and support newer members, contributing to the growth and development of the entire association.

5. Reporting Violations

- Members who become aware of any violations of this Code of Conduct are obligated to report such incidents to the association leadership promptly. (note: this is a Membership Standard requirement)

Welcome to a world-class community of trusted professionals committed to the highest standards of excellence.

For more information or any questions please contact one of our [staff](#)