

Scale Up Your Firm's Culture with Stronger Relationships

ONLINE EVENT

October 23, 2020 | 9:00 AM - 3:00 PM ET

Up to 5 Credit Hours of CPE

cpafma.org/events

CPA FMA
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macpa

BUSINESS
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THEAGENDA (all times eastern time)

ONLINE. INTERACTIVE. CUSTOMIZED.

If you are a CPA firm manager, managing partner or HR professional, this online event is designed for you. Sponsored by **CPAFMA's Washington D.C. Chapter** and **MACPA/BLI**, sessions have been exclusively developed to help scale up your firm's culture with stronger relationships.

9:00 AM	Welcome and Housekeeping
9:15 AM	Thanks for the Feedback: Lessons in Giving and Receiving Feedback (100 min) Rebekah Brown, CPA
11:00 AM	Break
11:15 AM	Value of Collaboration: The Art of Relationship Management (150 min) Peter Margaritis, CPA, CGMA, CSP
12:00 PM	Lunch and Roundtable Discussion
1:00 PM	Value of Collaboration (part 2)
3:00 PM	Conclusion

WHAT PARTICIPANTS LEARN

LEARNINGOBJECTIVES

- Identify the three types of feedback and the degree to which you need each one
- Recognize the barriers and blind spots that can get in the way of receiving feedback well
- Create an action plan for getting the feedback you need
- Illustrate how the seven principles of improvisation will make you a more effective communicator
- Define the term adding value as it relates to your firm and clients
- Illustrate the four pillars of emotional intelligence
- Compare and contrast the concept of managing up, down, in and out
- Demonstrate techniques on how to build a stronger team

SESSION DESCRIPTIONS

Thanks for the Feedback: Lessons in Giving and Receiving

Course Level: Basic

Field of Study: Personal Development

Credit Hours: Participants can earn up to 2 hours of CPE

Prerequisites and Advanced Preparation: None

Delivery Method: Group Live

Whether we realize it or not, we are constantly both giving and receiving feedback. We know that feedback is essential to our personal development, but we so often dread and even dismiss it. Feedback can be ill timed, unfair and downright mean, but that doesn't have to dictate our ability to use it for our own growth. Using lessons from the best-selling book, "Thanks for the Feedback" by Douglas Stone and Shelia Heen, learn the three types of feedback, the barriers to receiving good feedback and how we can be empowered to seek feedback for our own growth.

Value of Collaboration – The Art of Relationship Management

Course Level: Basic

Field of Study: Business Management & Organization

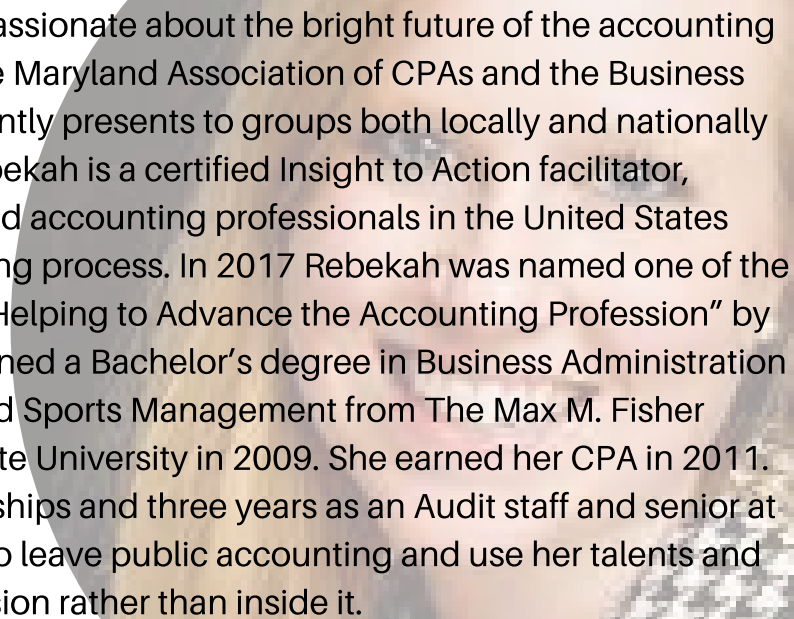
Credit Hours: Participants can earn up to 3 hours of CPE

Prerequisites and Advanced Preparation: None

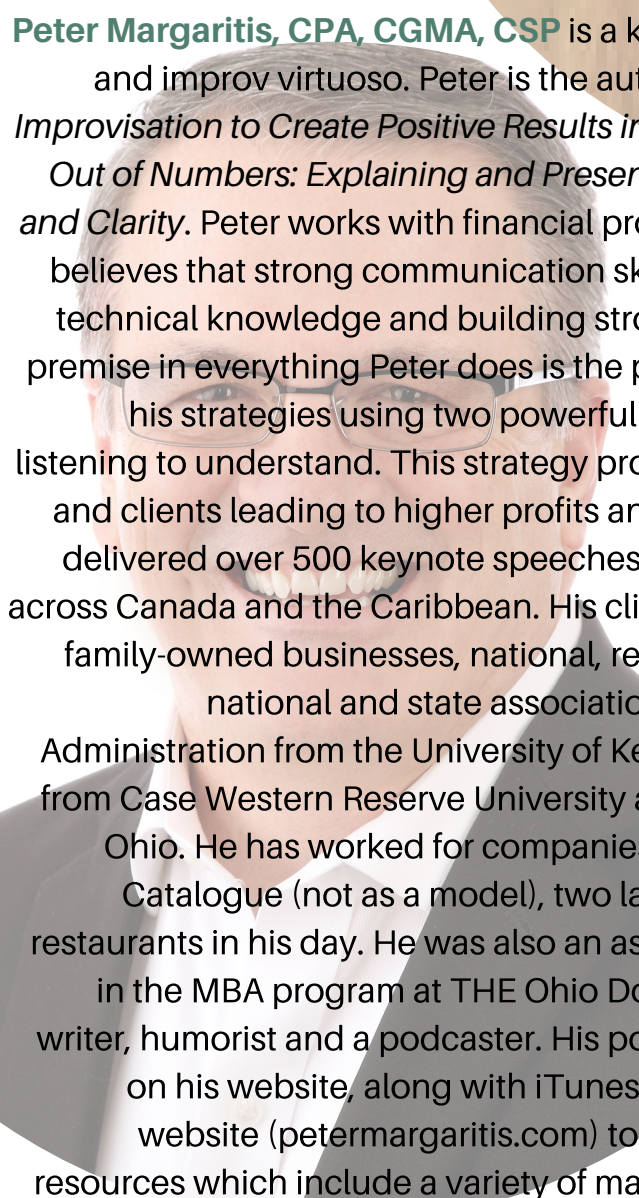
Delivery Method: Group Live

CPAs are in the people business first and everything else is a bi-product – tax return, audit, or a financial analysis. The better we serve our clients, the better we help solve their business challenges, and the more likely your firm will be successful. Effective communication, emotional intelligence awareness, and stronger leadership skills are important aspects that can increase your firm's transparency. Becoming a better communicator starts with active listening, asking probing questions and parking your agenda. Emotional intelligence is the awareness of yours and others emotions and using this information to guide your thinking and behavior. Becoming a better leader has nothing to do with your title. Effective leadership is the positive effect that you have on another person, no matter what their title.

OUR PRESENTERS



Rebekah Brown is a CPA who is passionate about the bright future of the accounting profession. As part of her role at the Maryland Association of CPAs and the Business Learning Institute, Rebekah frequently presents to groups both locally and nationally on the future of the profession. Rebekah is a certified Insight to Action facilitator, having guided firms, non-profits and accounting professionals in the United States and Canada in the strategic planning process. In 2017 Rebekah was named one of the "20 Under 40 Superstars Who are Helping to Advance the Accounting Profession" by CPA Practice Advisor. Rebekah earned a Bachelor's degree in Business Administration dual specializing in Accounting and Sports Management from The Max M. Fisher School of Business at The Ohio State University in 2009. She earned her CPA in 2011. After two public accounting internships and three years as an Audit staff and senior at a Top 100 firm, Rebekah decided to leave public accounting and use her talents and experiences to work for the profession rather than inside it.



Peter Margaritis, CPA, CGMA, CSP is a keynote speaker, communication strategist, and improv virtuoso. Peter is the author of two books, *Improv Is No Joke: Using Improvisation to Create Positive Results in Leadership and Life* and *Taking the Numb Out of Numbers: Explaining and Presenting Financial Information with Confidence and Clarity*. Peter works with financial professionals to help adapt their mindset and believes that strong communication skills are the most effective way of delivering technical knowledge and building strong business relationships. The underlying premise in everything Peter does is the power of applied improvisation. He focuses his strategies using two powerful words, YES AND along with the concept of listening to understand. This strategy promotes a better connection with customers and clients leading to higher profits and higher retention of employees. Peter has delivered over 500 keynote speeches and workshops in 38 states in the U.S. and across Canada and the Caribbean. His clients range from Fortune 500 companies to family-owned businesses, national, regional & local public accounting firms, and national and state associations. Peter earned his Bachelor's in Business Administration from the University of Kentucky, a Master's Degree in Accountancy from Case Western Reserve University and he is a licensed, non-practicing, CPA in Ohio. He has worked for companies such as Price Waterhouse, Victoria Secret Catalogue (not as a model), two large banking institutions and has managed restaurants in his day. He was also an assistant professor of accounting and taught in the MBA program at THE Ohio Dominican University. Peter is also a blogger, writer, humorist and a podcaster. His podcast, Change Your Mindset can be found on his website, along with iTunes, Stitcher and Google Play. You can visit his website (petermargaritis.com) to watch his videos and read his promotional resources which include a variety of magazine articles, along with his weekly blog.

SCALING IT UP WITH DETAILS

+ DATE

October 23, 2020
9:00 AM - 3:00 PM ET

+ LOCATION

Online via Zoom
Log-in instructions will be sent within 24 business hours of receiving your confirmation.

+ CPE

CPA Firm Management Association is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website:
www.nasbaregistry.org.

+ COST

This online event is \$89 per person. All sessions, with the exception of breakout rooms, will be recorded and registrants will receive a copy of the recordings.

+ CANCELLATION

If you are unable to attend the event, please notify CPAFMA in writing. Registrations are transferrable until 5:00 PM ET on October 22, 2020. Refunds, less a \$10 processing fee, are provided until 5:00 PM ET on October 16, 2020. For more information regarding refund, complaint and/or program cancellation policies, contact CPAFMA at (937) 222-0030.

+ SPONSORS



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