

Preparing to Lead— Becoming a Leader in the Accounting Profession

Catalina Kirby, CPA

Partner
Miller Kaplan
Seattle, Washington

Aaron Slaughter, CPA

Senior Manager
WithumSmith+Brown, PC
Washington, D.C.

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MEET YOUR SPEAKERS



Aaron Slaughter, CPA
Senior Manager
WithumSmith+Brown, P.C.
Washington D.C.



Catalina Kirby, CPA
Partner
Miller Kaplan Arase LLP
Seattle, Washington

Areas of Coverage

Interaction with "the Board"

Interaction with plan professionals

How does one "add value" beyond an audit?

Using professional judgement

Navigating organizational culture

Team building . . . The dos and don'ts

Working across generations

Remote culture vs. in-person

How Many Times Have You Met With a “Board”?

1. Never, can't wait
2. 1 to 5 times
3. Many times, I'm an expert at this

Interaction With the “Board”— Proceed With Caution

Having a great rapport with a plan’s governance structure is paramount

- Why?
- There’s a fine-line that must be toed
- Endearing yourself to plan management can also help

Tactics for forging relationships with the Board

- Being responsive AND correct
- Client dinners
- Discussions during meeting breaks



Interaction With the Plan's Professionals

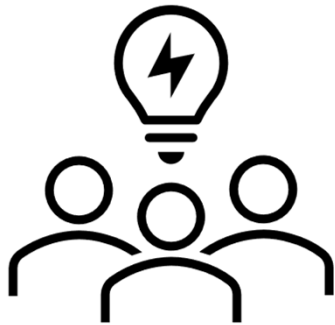
- Understanding that teamwork makes the dream . . . Work
- No surprises—At meetings or other
- Don't be afraid to pick up the phone to resolve questions
- Avoid those embarrassing moments

Relationships Matter!

- Be a good Samaritan—Be on time, but more importantly . . . Don't be the hold-up.
 - Set expectations
 - Be communicative
 - DELIVER
- Don't be a "mud-slinger"



How Does One “Add Value” Beyond the Audit?



- Keeping your client in “the know”
 - Providing answers to questions clients didn’t even know they had
 - Compliance, Compliance, Compliance . . . What’s your role in all this?
 - Are you educating your clients?
 - In order to add value, you must have some value to add
- Always be growing/learning/progressing**
- “Value” can be internal or external
 - Saving clients money, time, or both



How Have You Added Value?

Using Professional Judgement

Professional judgement is the new “Hot Button” issue to challenge

The 3 Qs—

- Is it good for the client?
- Is it good for your Firm/Organization?
- Is it good for you?

Documentation! Documentation! Documentation!

MUST be comfortable making decisions

- Developing the thought-process behind arriving at your decisions is often more important than the actual decision at this stage

Navigating Organizational Culture

- The Lifers vs. New-school
 - The emerging leaders are caught in the middle
- Are you a part of the succession plan?
- Reinventing yourself is a requirement
 - How does your role fit in with the Organization's strategic plan?
- Do you have a mentor/coach/advocate?



Team Building . . . The Dos and Don'ts

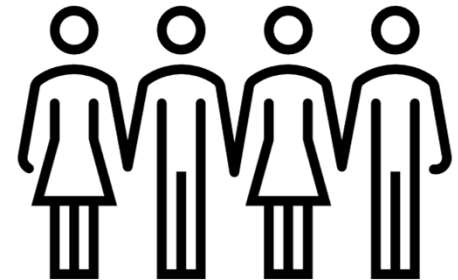
- ✓ Understanding “one size does NOT fit all”
- ✓ A good leader is a motivator
- ✓ Train, Teach, then EMPOWER
- ✓ Be consistent, honest, and available
- ✓ Create a place where people WANT to stay
- ✓ Provide timely feedback so that people can grown and learn



Team Building . . . The Dos and Don'ts

☛ Don't assume—

- ☛ Don't assume they understand, Don't assume they know, don't assume they'd handle it like you would
- Everyone's aspirations aren't the same . . .
And that's OK too.
- How you learned may not be how they learn
- Don't forget to show appreciation
- Frustration is a part of the job, but you can't show it
- Don't forget what it was like to be where they are



What's Your Generation?

1. Baby Boomers (1946-1964)
2. Generation X (1965-1980)
3. Millennials (1981-2000)
4. Generation Z (2001-2020)

Working Across Generations

It's part art and it's part science

Must be flexible to pivot amongst the different generations

Understanding that the leadership position is one of connecting, facilitating, and moderating

"Rigidity" and "closed-mindedness" are things of the past

"What got you here, won't get you THERE!"



**What Are Your Favorite Things About
Remote Work?**



**What Are Your Favorite Things About
Working in the Office?**

Remote Culture vs. In-Person

Pre-Pandemic vs. Post-Pandemic

Accelerated "Burn-out"

Remote work vs. In-person work

Can both worlds co-exist?

Work is still getting done, but employee connection these days is hit-or-miss

Accommodating your people without being taken advantage of

Key Takeaways



Relationships matter—
Both with the Board and with Plan professionals



You're more than just "an auditor"—Are you valuable?



Using professional judgement is a skill that can be learned



How do you fit in with your firm/company?



Only thing that is constant . . . Is change

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Session Evaluation



Questions?



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