FICPA

LEADERSHIP

ACADEMY

2021-2022

THE FICPA LEADERSHIP PROGRAM

REAL WORLD CHALLENGES—
REAL WORLD CURRICULUM

This high-impact program will help your leaders and leaders-to-be develop the key skills necessary for the successful continuation of your organization. The program, which will take place over a three-month period, includes:

- Interactive discussion and learning with identified incoming leaders selected for this program throughout Florida
- Practical ideas for new leaders in the accounting profession taught by two of the top recommended CPA Firm consultants in the country, both of which are proven and recognized leaders including both being past Chairs of the AICPA.
- Training from materials created by our instructors based on the work they do teaching leaders throughout North America as well as management training materials from the Center for Leadership Studies
- In-person group workshops with live instructor - Three sessions totaling 36 hours of CPE focused on skills leaders need
  - ~ Situational Leadership® workshop to enhance delegation, supervision and development skills – 1 and 2/3rds days
  - ~ Practice Management, People Development and Communication Skills workshop – 1 and 2/3rds days
  - ~ Strategy and Change Management – 1 day
- 36 hours of CPE Credit granted for completed program workshops

PREREQUISITES

Participants should have supervisory experience or accounting firm management experience.

FICPA 2021 SCHEDULE

Activity	Date
Situational Leadership® 360⁰ Assessments (7 days to complete)	After October 15th. 2021
#1 Workshop: Situational Leadership™ (1 & 2/3rds Days)	**November 8-9, 2021** **Location: Davie/Florida CPA Summit**
#2 Workshop: Practice Management, People Development, Communications (1 & 2/3rds Days)	**December 13-14, 2021** Location Tampa
#3 Workshop: Strategy and Change Management (1 Day)	**January 11, 2022 (Tues)** Location: Tallahassee
FICPA Advocacy Day	**January 12, 2022 (Wed)** Location: Tallahassee

SUCCESSION INSTITUTE

SITUATIONAL LEADERSHIP®

Tommye and Bill, in their work with executives and leaders throughout North American, from companies of all sizes, have been teaching leadership and coaching individuals to become better managers and leaders for the past three decades. During this time, they have developed materials and delivered everything from keynote speeches and one-day workshops, to multi-year training programs training on this subject matter. The late Dr. Paul Hersey's teachings and research conclusions from his best-selling book Situational Leadership® are a cornerstone of their programs because they know it is difficult to become a better leader and manager if you don't have the necessary tools to lead, manage and develop the people around you.

Because of this appreciation, the Succession Institute requested and was granted special Affiliate privileges by The Center for Leadership Studies, Inc. (CLS) so they could incorporate Dr. Hersey's materials into their programs. The Situational Leadership® materials are an integral part of our curriculum.

Situational Leadership® makes up the first day and 2/3rds of the second day of the Leadership Institute. It is focused on helping owners, partners, managers and/or supervisors understand how people are influenced as well as how to develop strategies for increasing an organization's productivity and improving the quality of your owners' and managers' effectiveness. By focusing on the skills necessary to constructively influence employees through proper delegation, supervision and development, Situational Leadership® complements and strengthens any existing management system.

Situational Leadership® is a proven and powerful skills-based program that teaches owners, managers and supervisors how to vary their leadership style to match the behavioral needs of the individual or group they're attempting to influence, leading to improved employee performance.

When asked why Succession Institute switched from teaching just their own course materials to including those provided by The Center for Leadership Studies for additional support, the answer was simple:

"Not only are Dr. Hersey's materials excellent; as the founder of the field of Organizational Behavior, his research and teachings are the most field tested and practical to implement. The problem with most management training is that, while it is interesting and espouses values and ethics you should live by, it doesn't teach you how to better lead and manage in practice. We should know ... We've been teaching in this area for a long time. With Dr. Hersey's materials, the training and feedback mechanisms are in sync and designed to help the leader -- and those who follow the leader -- evolve.

Once you have worked through this material, you are armed with a practical approach to management that can be implemented instantly. One final point! Dr. Hersey's training has predominantly been aimed at the Fortune 1000 and similar companies because of the resources required to support programming of this high caliber. As an affiliate of The Center for Leadership Studies, Succession Institute is well positioned to bring a new level of excellence to leadership and management training, as well as coaching, at a price that the small and medium sized companies and CPA firms we serve can afford."

CURRICULUM DEVELOPMENT

Our programs are developed and conducted by partners of the Succession Institute. They each have over 30 years of experience working with accounting and business executives. They understand the challenges leaders face in today's organizations and know what usually works to overcome those challenges. Our development and training offerings are experientially based to ensure that participants acquire the concepts and skills, using a multitude of media, techniques and tools, such as:

- Pre-work –assessment instrument for management style and skills feedback
- Lecture with application of real-life situations
- Group facilitated discussions
- Video presentations
- Behavior modeling examples
- Case studies
- Role-play scenarios
- A simulator board game
- The development of action plans

Together these activities and components will make up a highly interactive and effective development system that challenges the participants to evolve, create a personal roadmap for change, and increase their skill levels while enjoying the learning environment..

Situational Leadership® 360⁰ Assessments (10 Minutes)

The CLS Situational Leadership® 360 is a short 12-question assessment focused specifically on influence and management, which includes delegation to, and supervision and development of, the people who work for the participant. It also includes influencing and directing clients and vendors. Responses are desired from no fewer than seven (7) people that work with the participant as well as his/her self-assessment. Participants with larger firms normally invite some bosses/managers, peers and direct reports to complete this. For those with very few to no staff, they might want to consider including a few people that have experienced their working style, including clients and those they have served with on volunteer committees or boards in the recent past, etc. This assessment is used to identify participants' default leadership and management styles.

PROGRAM WORKSHOPS

#1 In-Person Workshop - Group Live: Situational Leadership® Foundational Principles for Managing and Leading Others (Almost 2 Days)

This one-and-2/3rds day workshop is designed to improve a leader's ability to develop others, customized for accountants in public practice with interactive, experiential exercises to practice the application of the principles learned.

Learning Objectives for Workshop on Situational Leadership®:

- Introduce the Situational Leadership® model and why it is important
- Understand how to assess the skill and motivation levels of employees, and match that with the appropriate leadership style
- Develop others and improve time-management through proper delegation
- Practice navigating appropriately between coaching, consulting, collaborating and managing styles
- Utilize case studies to practice consciously selecting a leadership style appropriate for a situation
- Provide communication skills and a common language to effectively influence employee behavior
- Practice a process to effectively cover difficult performance issues in an unemotional way, and accelerate the development and retention of talent
- Learn tips and techniques to improve time management
- List personal action items to take back to work

#2 In-Person Workshop -Group Live: Practice Management, People Development, and Communication (Almost 2 Days)

This 1 and 2/3rds day workshop includes current best practices in general management, people development, conflict management, negotiation, and communication as well as managing change. This workshop includes experiential exercises to allow the participants to build skills in these critical areas in a low-risk environment

Learning Objectives for this Workshop:
- Review what's been working, what hasn't worked as well as a result of this program to date
- Introduce and discuss accounting profession trends and benchmarks
- Understand the EWYK versus the BAV models of operations, and impact on management and policies
- Review the leadership and management roles and why you need both
- Identify best practices in developing people to be better, faster, stronger with developmental coaching
- Learn how and when to be assertive to effectively influence others
- Review how to manage conflict effectively
- Discuss personal experiences with implementing the best practices
- Understand principles of effective communication, including nonverbal communication, effective listening skills, and asking the right questions, through lecture and experiential exercises

#3 In-Person Workshop - Group Live: Strategy and Change Management (1 Day)

During the last day of this program, this workshop focuses on skills needed to create your organization's strategy as well as how to manage change in your environment.

Learning Objectives for this Workshop:
- Review what's been working, what hasn't worked as well as a result of this program to date
- Review the basics of strategic planning
- Discuss why Organizational Change rarely occurs without an agreed-to plan
- Understand why change is difficult and best practices for implementing change
- Understand the enablers for change by reviewing change management basics
- List personal action items to take back to work
- Program wrap-up activities

PROGRAM FACULTY

Bill Reeb, CPA, CITP, CGMA, Co-Founder and CEO

Bill has been consulting for three decades to all sizes of businesses, from Mom and Pop operations to Fortune 100 companies, primarily in the areas of strategy, leadership and change management. He decided to add the credentials of CPA behind his advisory work and became a CPA in 1986. Prior to his life as a CPA, he worked for IBM in sales back in the late 70's. As an entrepreneur, Bill has founded seven small businesses, he had two ladies clothing stores, one retail computer software store, a software development firm, a computer consulting firm, a CPA firm, and his current management consulting firm Succession Institute, LLC.

As an award-winning public speaker, Bill lectures throughout the U.S. and Canada to thousands of executives and CPAs each year. In addition, he has been featured on numerous video-taped and live television programs. As an award-winning author, Bill is internationally published with hundreds of articles and columns to his credit. He currently authors a bi-monthly column called "In the Bill-iverse" which is distributed by a number of State CPA Societies as part of their Practice Management e-newsletter. Besides being published by various magazines, journals and newspapers, Bill and his partner Dom have co-authored two books on Succession titled *Securing the Future: Building Your Firm's Succession Plan* with its companion field guide called, *Securing the Future: Implementing Your Firm's Succession Plan*. He and his partner also co-authored the Succession Resource Center website materials for PCPS in 2008 and the fourth edition of their consulting book called *Becoming A Trusted Business Advisor: How to Add Value, Improve Client Loyalty, and Increase Profits*. Finally, Bill's newest book is titled *The Overachiever's Guide to Getting Unstuck: Replan, Reprioritize and Reaffirm*. All of their books have been published by the American Institute of Certified Public Accountants (the AICPA).

Bill is an active volunteer within his profession having served in many leadership roles. To name a few, he is Past Chair of the Board of the AICPA, is a current and past member of the Board of Directors and Council, and past Commissioner on the National Accreditation Commission. He also serves as an advisory board member to several organizations, including CPAFMA.

Bill has been honored by being named as a CPA Ambassador, was presented the Pathfinder Award and served as the Texas Vision Delegate. Accounting Today has recognized his efforts by listing him as one of the Top 100 Most Influential CPAs, CPA Magazine has named him as one of the Top 100 Most Influential Practitioners, and Inside Public Accounting has listed him as one of the top 10 most recommended CPA firm consultants.

Finally, Bill enjoys a number of hobbies. He is an avid golfer and skier. But he spends the majority of his free time as a senior black belt teaching (as well as continually learning) in the tao wu hsian hua (way of infinite transformation) system, which incorporates comprehensive aspects of tae kwon do, karate, hapkido, kung fu, and tai chi.

Tommye E. Barie, CPA, Executive Vice President of Leadership Development

Tommye Barie is a recently retired partner of one of the 100 largest full-service accounting and consulting firms in the US. After more than thirty years as an audit and assurance partner, and as her last charge before retirement, she launched the Firm's Client Advisory Services practice. Tommye served on the firm's audit and assurance committee and the firm's FAST (forward and strategic thinking) committee.

Tommye has a proven track record of leadership and visioning with various organizations. Her thought leadership on culture, strategy and innovation led to Tommye being recognized as one of the 100 most influential people in the accounting profession, as published in Accounting Today. Additionally, the Michigan Society of CPAs recognized her with their Outstanding Visionary Award.

AICPA
CPA Practice Advisor
2019 Most Powerful Women in Accounting
Award Winner

Tommye drives results and collaboration through balanced inspirational and strategic leadership. She is engaging and influences diverse teams to peak performance with strong interpersonal skills and vision. She has a rare blend of strategic and tactical abilities to facilitate desired outcomes.

In addition to serving her former accounting firm, Tommye is among the most well-known and highly respected leaders in the accounting profession. During 2014-2015 she served as Chair of the Board of the American Institute of CPAs, an organization with more than 412,000 members at the time and a budget of approximately $200 million, and she previously served as Chair of the Florida Institute of CPAs. She currently serves on the Board of the National Association of State Boards of Accountancy's Center for Public Trust which is an organization whose mission is to champion the public trust by advancing ethical leadership in business, institutions and organizations.

Tommye is actively involved in the international accounting profession and currently represents the United States as a board member of the International Federation of Accountants (IFAC). She currently Chairs the Governance Committee and will lead the Organization's constitutional review process. The IFAC is a global organization supporting the development of and promoting the adoption and implementation of high-quality international standards.

Tommye has always placed importance on leveraging her leadership skills and experiences to influence the lives of young professionals. Throughout her career she has mentored and guided women and men in her own firm and in the many firms she has worked with throughout the United States. Additionally, she enjoys serving on the College of Business Advisory Boards for Stetson University and University of South Florida.

SUCCESSION INSTITUTE

For More Information:
The Succession Institute LLC
2603 Pearce Road
Austin, TX 78730

512.338.1006

bill@successioninstitute.com
tommye@successioninsittute.com
www.SuccessionInstitute.com