

AUDITWATCH TRAINING SOLUTIONS

LEADERSHIP I: EVERYDAY ESSENTIALS

In this highly interactive course, advancing professionals develop essential, results oriented leadership skills to boost individual and firm success. Topics include foundational leadership principles, DEI (diversity, equity and inclusion), goal setting and prioritization, collaborative negotiation, presentation skills, mindfulness, and business development skills.

REQUIRED KNOWLEDGE AND EXPERIENCE: Current or future responsibility leading others

COURSE TYPE: Seminar

COURSE LENGTH: On-site--3 days Virtual--4 days

ADVANCED PREP: None

RECOMMENDED CPE CREDIT: 24 hrs.

COURSE LEVEL: Advanced

FIELDS OF STUDY: Personal Development, 10 hrs.; Communications and Marketing, 12 hrs.; Behavioral Ethics, 2hrs.

MAJOR TOPICS AND LEARNING OBJECTIVES:

Introduction – 1 Credit (Personal Development)

- Identify current and upcoming roles and responsibilities that require strong, competent leadership

Leadership Essentials – 4 Credits (Personal Development)

- Recognize your role as a leader
- Self-assess your leadership style
- Discuss ways to improve your personal leadership skills
- Identify ways to become a better mentor / coach.

Diversity, Equity and Inclusion - 2 Credits (Behavioral Ethics)

- Recognize and critically reflect upon potential cultural biases
- Foster an inclusive firm culture that embraces diversity and engages across differences with empathy and integrity

Goal Setting and Prioritization - 2 Credits (Personal Development)

- Identify personal time management techniques
- Practice techniques to effectively identify, rank, and choose priorities
- Apply a structured model to set and achieve goals

MAJOR TOPICS AND LEARNING OBJECTIVES (CONT.):

Collaborative Negotiation - 2 Credits (Communications and Marketing)

- Describe and apply collaborative negotiation skills that enable business success
- Define skills to handle challenging conversations

Presentation Skills – 8 Credits (Communications and Marketing)

- List and explore the characteristics of effective presenters
- Use proven techniques to organize and deliver engaging presentations

Business Development Skills – 2 Credits (Communications and Marketing)

- Identify the three primary practice development goals
- Describe ways to retain existing clients and expand product / service offerings to them
- Explore techniques to create new business opportunities
- List best practices for creating a personal client development plan

Mindfulness - 2 Credits (Personal Development)

- Describe and apply the basic principles of mindfulness to leadership, management and client relationships
- Practice the key steps of the mindfulness
- Apply mindfulness to everyday activities at your firm to achieve health and work balance in the short term

Summary: Best Practices – 1 Credit (Personal Development)

- Identify best practices
- Share insights with fellow participants

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LEADERSHIP II: EXPANDING CAPABILITIES

This engaging course expands the participant's professional leadership capabilities. Topics include developing executive presence, using emotional intelligence to achieve success, managing in the multi-generational workplace, performance and talent management, DEI (diversity, equity and inclusion), mindfulness and building new business.

PREREQUISITE: Leadership I - Everyday Essentials

COURSE TYPE: Seminar

COURSE LENGTH: On-site--3 days Virtual--4 days

ADVANCED PREP: None

RECOMMENDED CPE CREDIT: 24 hrs.

COURSE LEVEL: Advanced

FIELDS OF STUDY: Personal Development, 14 hrs.; Personnel / Human Resources, 3 hrs.; Communications & Marketing, 5 hrs.; Behavioral Ethics, 2 hrs.

MAJOR TOPICS AND LEARNING OBJECTIVES:

Introduction – 1 Credit (Personal Development)

- Identify and explore the fundamentals of Executive Presence

Developing Executive Presence - 6 Credits (4 Personal Development, 2 Communications and Marketing)

- Identify the elements of executive presence
- Analyze strengths and weaknesses by completing executive presence component self-assessment
- Apply enhanced communication techniques to build and maintain trust

Diversity, Equity, and Inclusion - 2 Credits (Behavioral Ethics)

- Recognize and critically reflect upon potential cultural biases
- Foster an inclusive firm culture that embraces diversity and engages across differences with empathy and integrity

Using Emotional Intelligence to Achieve Success - 4 Credits (Personal Development)

- Recognize the main components of Emotional Intelligence (EI)
- Practice EI fundamentals through a series of interactive discussions and exercises after an in-depth self-assessment
- Explain how EI is applied to enhance work relationships, performance, and productivity

MAJOR TOPICS AND LEARNING OBJECTIVES (CONT.): Developing Managing in the Multi-

Generational Workplace – 3 Credits (Personal Development)

- Describe the generations that make up the current workforce
- Explore key differences, characteristics, and behaviors of each generation
- Learn techniques and strategies for effective interactions with multi-generational teams

Performance and Talent Management - 3 Credits (Personnel/Human Resources)

- Identify and explore the dynamics of performance and talent management in the public accounting industry
- Explain how to identify and develop talent in individuals to maximize their performance and professional growth
- Gain insight on best practices to develop and retain staff

Building New Business - 2 Credits (Communications and Marketing)

- Explore important concepts related to developing new business
- Apply structured techniques to plan for and develop business growth
- Practice the art of gaining new business through a series of interactive skill-building activities

Mindfulness – 2 Credits (Personal Development)

- Describe and apply the basic principles of mindfulness to leadership, management, and client relationships
- Practice the key steps of mindfulness
- Apply mindfulness to everyday activities at your firm to achieve health and work balance in the short term

Summary: Best Practices – 1 Credit (Personal Development)

- Summarize the key learning points of this course
- Share insights with other participants