

Leadership Education for Accounting Professionals—Make the LEAP

Expand and enhance your firm—If you are looking to understand how you and your firm can be more efficient, expand your services, and grow your firm, this all-inclusive bundle is made for you. This complete bundle of 41 courses is worth 62 CPE/CPD hours.

Expand and enhance your firm bundle (62 hours) —\$299	# CPE/CPD hours
<p>Best practices in accounting and finance writing: Being clear and accurate</p> <p>Readers of finance and accounting documents expect the information to be complete, accurate, and readable—neither overly simplistic nor complex. This program will enable participants to select and apply language that delivers clear and readable documents, reports, letters, and emails.</p>	2
<p>Best practices in accounting and finance writing: Putting ideas in order</p> <p>This course will show you how to manage your thinking and create an organized document that highlights what you want your reader to know, think, and do. Participants will learn how to present ideas in the proper sequence so that readers will understand their writing.</p>	2
<p>Blog 101: First steps to stardom</p> <p>Want to boost your brand, become a thought leader, start a conversation, and drive the world to your website all at the same time? Here's how: Start a blog. Here's a quick-start guide to starting your blog and what you need to do to make it shine.</p>	1
<p>Brand you: How to be a leader and boost your career . . . with a little help from social media</p> <p>You don't need to write books or earn advanced degrees to be a thought leader. We're all experts at something, and thanks to social media, it's easier than ever to tell the world about it. This session examines the dos and don'ts of personal brand management in the age of social media.</p>	1
<p>Business development: Distinctions between marketing and sales</p> <p>Is it marketing, or is it sales? And does it make a difference? This short course explores those key questions—and their implications for growing your business.</p> <ul style="list-style-type: none"> • Differentiate among the big three concepts in business development: sales, marketing, and wasting your time and money • Use tips to improve the first two and avoid the third 	1
<p>Employee motivation and engagement: Driving results without driving your team crazy</p> <p>If you've ever wondered, "How do I better motivate, inspire, and engage my staff to consistently get the job done?" then this course is a MUST for your management development, success, and sanity. This "I can use that immediately" course will help you learn how to better:</p> <ul style="list-style-type: none"> • Build accountable teams that deliver stronger results. • Handle even the most challenging personalities. • Give feedback that increases performance and accountability. • Motivate and engage top performers to continue performing. 	3
<p>Find a need and fill it: Your key to business development</p> <p>It's the oldest saw in your business toolbox—find a need and fill it. Yet the fine art of uncovering needs is a powerful tool to help you take your business to the next level. This course helps you reframe your sales and marketing efforts from a traditional solutions-based platform to a more effective needs-based platform.</p> <ul style="list-style-type: none"> • Increase the perceived value of what you offer clients • Offer more services than you would have expected • Build a larger client base than you would have expected • Sell in a kinder, gentler, more professional way 	1

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From technical expert to financial leader: How to make a critical leap in your career

2

When contemplating transitions in their careers, most individuals are uncertain about how to prepare for making these critical changes. This workshop describes a roadmap of the skills, competencies, and experiences needed to transition successfully from a controller to CFO or learn how to provide CFO services to your clients and what they need.

- Describe the four major CFO leadership roles
- Assess your current skills and competencies against those of the successful CFO
- Create a plan for how to increase your credibility, visibility, and value in your current position in order to position yourself for career advancement

Getting things done: Engaging people to execute effectively

2

Leaders are responsible for ensuring people execute organizational strategy and achieve goals. However, telling people what to do is impracticable—people won't necessarily do what they're told to do, and no leader has the time to figure out and communicate exactly what each person needs to accomplish. The key to execution is knowing how to communicate expectations and how to develop people's ability to think and act appropriately and effectively.

How the best financial executives create high-performance organizations

2

The ability to maximize an organization's performance is increasingly difficult due to dramatic changes caused by economic pressures and competition for scarce resources. The key to creating a high-performance culture is an effective leadership team, one that embraces change, sets priorities, and meets organizational challenges head on. Ultimately, success is based on their ability to continuously scan the business environment and realign the organization for maximum performance. This course is ideally suited for intact teams to assess, analyze, and create plans for better alignment and more effective execution. Such teams include the C-suite executive team, functional/departmental organizations, customer account teams, and cross-functional project or implementation teams.

Identifying, developing, and hanging on to talent

2

Developing organizational talent is too critical to leave to chance. Unfortunately, many businesses wrongly equate talent development with the annual performance review process. This course will present a proven approach on how to elevate the most talented staff within your organization.

Leader vs. manager vs. facilitator: When, why, how?

2

This program examines leadership, management, and facilitation and when to use each. It is designed for professionals who lead others or who might lead others. New generations are bringing different expectations to the workplace, and globalization continues to increase the complexity of the situation by introducing new markets, new demands, and more diversity.

Leadership and generations: What are they thinking?

4

Increasingly, generational differences are causing conflict and frustration in many organizations. Some of the differences, from how an employee views a dress code or work hours to how work gets done and what a full day of work means, are creating dissension. Each generation seems to be communicating: "What are they thinking?" In this program, you will learn about generational differences and develop an appreciation for how valuable those differences can be. You'll identify the areas where differences are most evident and discover ways to deal with them. This includes giving and receiving feedback, managing performance expectations, and increasing organizational effectiveness, productivity, and harmony.

Leadership: Coaching to develop and empower—accountability, delegation, and dialogue

2

Leaders need to coach people, how to be clear about expectations, how to empower, and how to delegate effectively.

- Define accountability and empowerment
- Use dialogue to clarify expectations
- Describe effective use of four levels of delegation

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Managing strategic business partners

2

A growing number of organizations report that as much as 80% of their core business processes are now handled through various types of strategic or outsourced business partners. Managing these relationships successfully and profitably requires a unique approach—one that creates win-win-win outcomes for the organization, the business partner, and the customer.

Personality styles in the workplace

3

Experience accounts for only 15% of workplace success. The other 85% is due to people skills! Take the DISC Profile and identify your own personality style. If you can understand your personality style and understand others from the perspective of what motivates them and how best to interact with them, you can dramatically increase your workplace effectiveness.

Strategic skills for finance

1

You know that strategy is important! According to a 2011 Deloitte survey, strategy setting has doubled in importance for CFOs. Yet 75% of CFOs indicate that their staff needs training to perform in a strategic role. So how do you change your focus from historical financial presentation to future strategic planning? Get yourself and your team prepared for the challenges by learning how to analyze data, define decision-making options, present effectively, gain consensus, and develop action plans.

Public speaking: How to speak with presence

1

Speaking with presence is a vital skill that everyone can learn. Whether you are presenting complex information to a client, speaking to colleagues, or briefing your superiors, your ability to communicate with presence can make or break your career. In just a short time, you will learn how to hone your message and transform your delivery.

Succession planning: Developing tomorrow's leaders today

2

Simply extrapolating the past is no longer adequate for firms when trying to anticipate the future. Strategic foresight does not attempt to forecast the future but simply allows firms to understand key drivers that may result in plausible future scenarios and provides the tools to position them favorably regardless of which future(s) actually unfold. Participants will gain understanding on how their firm competes, be able to determine primary drivers on these competitive aspects and anticipate how these drivers will change during specific time frames and will review the best- and worst-case scenarios for their company. The primary objective is for participants to leave as champions in their organizations for embracing the future.

The business case for social media in an era of epic change

1

We all know the social movement is about connecting, collaborating, and building relationships. Sooner or later, though, the boss is going to utter the words every social media fan dreads: "What's the ROI?" In this interactive session, Bill Sheridan will lay out five reasons why every business (and businessperson) needs to be using social media—and using it now.

The eight-hour MBA—best practices for better budgeting and planning

1

Instead of banning the budget, turn it into a planning process that helps your organization achieve its strategy.

The eight-hour MBA—communicating in the workplace

1

How you communicate with your clients can make or break your career! This module will discuss different personality styles and demonstrate the different ways to communicate information to them. See how recognizing their personality style(s) can turn communication breakdowns into breakthroughs.

The eight-hour MBA—faster disaster recovery

1

We often think about hurricanes and tornados as disasters, but have you thought about the impact of new technology, a product recall, or even fraud? Could your business survive six weeks without power?

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<p>The eight-hour MBA—ferretting out fraud</p> <p>Fraud costs U.S. companies \$400 billion annually. Do you know where the fraud is in your organization? Don't let your company continue to be a victim.</p> <ul style="list-style-type: none">• Define the fraud triangle• Recognize a fraud risk assessment	1
<p>The eight-hour MBA—insightful financial analysis</p> <p>There are a number of reasons you would conduct a financial analysis, from investment decisions to career management.</p> <ul style="list-style-type: none">• Enhance the participant's knowledge of the financial analysis steps• Identify the key components in the financial statement analysis	1
<p>The eight-hour MBA—nuances of negotiating</p> <p>When negotiating, there needs to be conversation that leads to an exchange—something gained for something given up.</p>	1
<p>The eight-hour MBA—presenting numbers for impact</p> <p>Have you ever presented financial information to a group of nonfinancial people only to get the glazed-over and underwhelmed look from your audience?</p>	1
<p>The eight-hour MBA—public speaking and presentation skills</p> <p>America's greatest anxiety, public speaking, is a necessity in today's business world. Those who can speak in front of crowds and have effective presentational skills tend to move up the corporate ladder more swiftly. You will be able to stand in front of an audience and project confidence and knowledge, all the while making a connection and capturing their audience's imagination to be powerful and persuasive.</p>	1
<p>The eight-hour MBA—success with social media</p> <p>Twitter, Facebook, YouTube—great fun personally, but what good are they for your business?</p> <ul style="list-style-type: none">• Determine the business benefits of social media and specific uses of specific sites• Start in social media in a way that fits your business	1
<p>The eight-hour MBA—the art of effective writing</p> <p>Your company is only as good as your writing. Despite all your efforts, are you still trying to explain the difference between good and bad writing?</p>	1
<p>The eight-hour MBA—the basics of business law</p> <p>Do you know how to keep your company and your clients on the right side of the law? How can management and directors protect themselves from liability?</p> <ul style="list-style-type: none">• Identify legal issues with corporate management, employee manuals, intellectual property, and contracts• Identify components of a contract	1
<p>The eight-hour MBA—tips and techniques for building a stronger network</p> <p>Networking is one of the most powerful tools accountants can develop, but it takes time, energy, and commitment in order to build a strong network. Having a strong network will assist you in launching a new idea or plan, developing new business and clients, reducing costs in recruiting, and leveraging your career.</p>	1

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The finance and accounting organization as strategist and partner to the business

2

How have successful finance and accounting organizations shed the image of policeman even in the wake of added controls to become partners and strategists to the business? It is because they accept technical competence as a necessity. The added value they bring is that they spend more time developing and managing critical relationships in order to learn all there is to know about the business, its customers, and the competition. This workshop explores how the finance and accounting organization positions itself to work as a trusted advisor to the business.

The positivity link to flourishing

1

This is an introduction to the groundbreaking research, from positive psychology and neuroscience that is changing the way we view the world and think about our happiness.

- Gain an introductory knowledge of the latest research on happiness and well-being and what it tells us about living our lives fully and sustainably
- Learn how to open up your mind about what is possible and provide pathways forward to happier living, resilient leadership, and well-being in the midst of adversity

The positivity link to meaning and purpose in the meaningful life

1

The fourth critical ingredient of our well-being is meaning and purpose. Driven from birth to pursue relationships and work that focuses our efforts on what matters, human beings are genetically wired to care about whether or not they matter.

Meaning and purpose is found in our contact with things outside of ourselves so it matters that we are paying attention to those interactions and carefully choosing where we are investing our time, talent, and energy.

This on-demand course introduces the thinking of Victor Frankl and George Vaillant, two thought leaders who have contributed substantial insight into what creates meaning: how to recognize and how to be intentional about ensuring that our lives have it as a core ingredient.

The positivity link to relationships with others: the connected life

1

Human beings are the most social creatures on the planet, and the social ties we create to other people are the single strongest predictor of our well-being, especially in times of hardship.

In this day and age of a multitude of friends and many competing demands for our time and attention, it becomes more important than ever that we are intentional about the way in which we invest ourselves in other people and what relationships we are cultivating along our way.

This on-demand course provides insight into why those relationships are so influential over our well-being and how we can be purposeful about the people we bring into our lives and the relationships we invest over time.

Positive relationships are a powerhouse of well-being; negative relationships are a drain on our resiliency, productivity, creativity, and motivation. What better reason would we have to get our relational house in order?

The positivity link to strengths

1

One of the most powerful bodies of research to come out of the field of positive psychology, strength theory shifts the perspective from a deficit model to a strength model.

As important as it is to work on our areas of development, we are now able to see that exponential gains can be made in engagement, productivity, creativity, and motivation when we are able to utilize our strengths and the strengths of others.

This on-demand course introduces two important strength theories: the first of which focuses on character strengths, or our way of being, and the second of which focuses on strength talents, or our way of doing. Developing an understanding of your character and talent strengths will change the way you invest yourself as well as how you build the team that surrounds you, positively impacting your results and the resiliency of your team and enhancing your ability to lead in a way that inspire admiration.

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The theory of positivity: the pleasant life

Positive emotion is one of the five essential life domains of our well-being. It's critical to our immune system and even more importantly to how our brain functions. This on-demand course will provide fresh insight into the powerhouse of positive emotion and what it adds to our well-being. This program will bring a fuller understanding of what it means to be happy, how to extend and savor positive emotion, and why being intentional about positive emotion makes for a big difference in your quality of life.

1

The theory of well-being (PERMA)

The pursuit of happiness has long been a goal of the human race. However, it is as elusive today as it was when Aristotle pondered its meaning in 350 BC. This program explores the theory of well-being, an evidence-based theory from the field of positive psychology that sheds new insight into what makes for a life well-lived, and explains what else we need (in addition to happiness) to flourish.

1

Transitions to leadership

Excellence in technical or financial skills does not automatically translate to excellence in supervising others. First-time supervisors face unique challenges as they transition to management: supervising work with which they may be unfamiliar, supervising employees with whom they had previously been coworkers or employees with greater seniority, understanding the extent of responsibility and decision making authority they have, wanting to be liked, finding ways to communicate expectations to their employees, and making unpopular decisions. This workshop will help new supervisors to successfully navigate the transition.

3

Twitter 101: Changing your world 140 characters at a time

It's no fad—Twitter has changed the ways in which professionals communicate, collaborate, and learn.

1

- Why Twitter is important
- What they need to do to get started

Total CPE/CPD hours

62

If you have any questions or need help registering for this bundle, please contact Brandon at 866-905-4545. For more information on the Sage Leadership Education for Accounting Professionals programs, please go to: NA.Sage.com/LEAP

For more info, visit: SageAccountantSolutions.com
or contact us at 866-996-7243