

# Advance your professional development skills

## 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:** In person, 3 days; Live online, 4 days

**Advanced prep:** None

**CPE credit:** 24 hours

**Course level:** Advanced

**Fields of study:** Personal Development, 10 hours; Communications and Marketing, 12 hours; Behavioral Ethics, 2 hours

### Major topics and learning objectives

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Upon completion of this course, participants should be able to:

#### Introduction — 1 credit (personal development)

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

#### 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

#### 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 or coach

#### Collaborative negotiation — 2 credits (communications and marketing)

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

**Major topics and learning objectives (continued)**

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Upon completion of this course, participants should be able to:

**Business development skills — 2 credits (communications and marketing)**

- Identify the 3 primary practice development goals
- Describe ways to retain existing clients and expand product and service offerings to them
- Explore techniques to create new business opportunities

**Presentation skills — 8 credits (communications and marketing)**

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

**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

**Mindfulness — 2 credits (personal development)**

- Describe the basic principles of mindfulness
- Practice the key steps of a fun and easy 8-minute daily CPA mindfulness exercise
- Apply mindfulness to everyday activities
- Achieve tangible benefits, including better health and balance at work

**Summary: best practices — 1 credit (personal development)**

- Summarize key learning points of the course
- 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 level:** Advanced

**Course type:** Seminar

**Fields of study:** Personal development, 14

**Course length:** In person, 3 days; Live online, 4 days

hours; Personnel/human resources, 3 hours;

**Advanced prep:** None

Communications and marketing, 5 hours; Behavioral ethics, 2 hours

**CPE credit:** 24 hours

### Major topics and learning objectives

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Upon completion of this course, participants should be able to:

#### Introduction — 1 credit (personal development)

- Identify and explore the fundamentals of executive presence

#### 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

#### 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
- Explain how to identify and develop talent in individuals to maximize their performance and professional growth
- Gain insights on best practices to develop and retain staff

### Major topics and learning objectives (continued)

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Upon completion of this course, participants should be able to:

#### Developing executive presence — 6 credits (4 personal development, 2 communications and marketing)

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

#### 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

#### Managing change — 2 credits (personal development)

- Define the core concept of managing change and its applicability to our organizations
- Walk through a 5-step process of managing change based on industry best practices
- Identify the critical success factors and key performance indicators essential to managing change

#### Leading with mindfulness — 2 credits (personal development)

- Describe and apply the basic principles of mindfulness to leadership and in management activities
- Practice the key steps of mindfulness
- Demonstrate competence in executing the key steps of the 8-minute daily PRO mindfulness practice
- Lead and facilitate the PRO mindfulness practice with your colleagues to increase team energy, effectiveness, and efficiency

#### Summary: best practices — 1 credit (personal development)

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