



# Financial Leadership 2013

- ***Leadership and Coaching Essentials for the CPA***
- ***Developing the CPA as a Strategic Business Partner***
- ***Leading the Generation Mix***

Today's financial leaders must help organizations create value, not simply measure it. Financial people play key roles in transforming visions and strategies into action programs at every level of the organization. This seminar deals primarily with practical day-to-day leadership applications, not broad theoretical concepts. It provides valuable insight into improving financial leadership abilities, both within and outside of the financial function.

## Seminar's Primary Focus:

- **The Financial Leader's Vital Competencies and Behaviors** — eight core competencies that form the building blocks of financial leadership. The five-C's of self-development.
- **Leading the Generation Mix** — realistic principles for leading across the four generations.
- **Rectifying the Five Most Common Dysfunctions of a Team** - correcting conditions that prevent teams from being successful.
- **The Financial Leader's Environment** — how to work effectively with superiors, peers, subordinates, and outsiders.
- **The Leadership Pyramid** — a career-building approach to leadership effectiveness.
- **Exemplary Financial Leadership** — understanding and applying the five fundamental practices to become an outstanding financial leader.

## What Will Be Learned:

This seminar focuses on practical leadership techniques outside of the normal accounting function, which will allow financial leaders to add value to the organization. These include:

- The eight core competencies of financial leadership. The five-C's of self-development.
- How to more effectively lead across the four generations.
- How to acquire an expanded role as a communicator of solutions.
- How to be positioned at a higher level in the organization's decision-making process.
- The five fundamental practices of Exemplary Financial Leadership.
- How to rectify the five most common dysfunctions of a team.
- The 20 characteristics of admired leaders.
- How to create a culture of Perpetual Learning.

## Who Should Attend:

CPAs at all levels who want to improve their leadership and coaching skills and improve their abilities to add value to the organization. The program will benefit all CPAs — from those with many years of managerial experience to those who are preparing for their first managerial position. This seminar is especially beneficial for the CPA who has recently moved from Public Accounting to a position in Industry or with a Service Organization.

CPAs in Public Accounting who want to improve their leadership abilities, and who are continually striving for new ways to add value for their clients.

**Seminar Materials:**

Each participant will receive a large Financial Leadership workbook, which will be used during the seminar and serve as a valuable take-home reference. The workbook includes many forms, schedules, and checklists (both financial and non-financial) that can be used immediately in business.

**Seminar Length:**

Half-day and Full-day - lecture, highly-interactive, small group discussions, exercises and case studies, opportunities for participants' questions.

**CPE Credit:** 4 hours and 8 hours.

**Level of Knowledge:** Basic.

**Prerequisite:** None.

**Advance Preparation:** None.

**About Your Seminar Developer / Presenter:**

Jack Park is a highly effective developer and presenter of Financial and Leadership Development programs. He founded Financial Insights, a consulting and leadership development firm, after serving 22 years with four major corporations. Park consults with organizations in the areas of Leadership Development, Business Planning, Profitability Analysis, and Cost Accounting.

Park has presented programs nationwide for 45 different State CPA Societies, Associations, Institutes and numerous Corporations. His corporate clients include Microsoft, BMW, Edward Jones, Home Depot, Nationwide Insurance, and Merrill Lynch. He serves as a Leader-In Residence instructor at the Franklin University Leadership Center. His knowledge and presentation skills ratings are consistently among the highest of all instructors

Park holds the National Speakers Association's Certified Speaking Professional (CSP) designation. The CSP, established in 1980, is the speaking industry's international measure of professional platform skill. Fewer than seven percent of NSA's 3,000 members hold this professional designation. He also received the Member of the Year Award from NSA's Ohio Chapter. Park earned his M.B.A. at The University of Pittsburgh and his B.S. from The Ohio State University.

## Seminar Outline

### **The Financial Leader's Vital Competencies and Behaviors**

- The Eight Core Competencies
- The Five-C's of Self-Development
- Establish and Communicate Priorities
- Follow Through and EXECUTE
- Leadership and Management

### **Leading the Generation Mix**

- The Four Generations in Perspective
- Personal Values and the Generations
- Understanding Conflict Across the Generations
- Organizational Politics and the Generations

### **Today's Financial Leader**

- The CPA Vision Process
- The Financial Leader's Environment
- Expanded Role as a Communicator of Solutions
- Positioning the CPA at a Higher Level in the Organization's Decision-Making Process

### **Rectifying the Five Most Common Dysfunctions of a Team**

- Building Trust
- Resolving Conflict
- Gaining Commitment
- Establishing Accountability
- Focusing on Results

### **The Leadership Pyramid and Leadership in Action**

- The Five Levels of Leadership
- Relationship Behavior and Task Behavior
- Assessing Follower Readiness
- The 20 Characteristics of Admired Leaders

### **The Five Fundamental Practices of Exemplary Leadership**

- Challenge the Process
- Inspire a Shared Vision
- Enable Others to Act
- Model the Way
- Encourage the Heart

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