

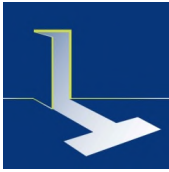


Presentations for CPA Professionals – 2023

Provided by TIERNEY Coaching & Consulting, Inc.



**Lisa Tierney, CLSC offers teleconferences, webinars,
seminars, half and full day workshops and key note
addresses**



TIERNEY Coaching & Consulting, Inc.

TIERNEY Coaching & Consulting is happy to provide a list of compelling topics that your organization might benefit from. We offer teleconferences, webinars, seminars, half and full day workshops and key note addresses. Contact us to discuss how we can tailor our presentations to accommodate your needs.

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Optimize Performance for CPA Firms while Creating a Culture of Accountability

Program Description:

What would it mean to your firm if you could – once and for all - eliminate the burdensome exercise and wasted time / effort of the annual review process...?!

And instead replace it with an ongoing process of regular upward and outward progress reporting that informs all – in a way that educates and inspires - of the value (results and benefits) being offered to the firm’s clients, all professional staff – in the office, remote and hybrid professionals – to realign the focus that professionals are applying to their jobs, creating a unified experience of tracking performance and a constant reminder of the firm’s living and breathing core values?

This a new way of empowering all staff to adopt, integrate and communicate to each other what their work means – purpose, delivery and results. Free up so much time as burdensome and ineffective grueling review meetings just disappear! Hello to accountability!

Topics to be Explored during the Program:

- Teach staff how to report – upward and outward – of their true “progress” and accomplishments
- Inform and inspire ALL immediately and ongoing
- Never have to check-in on staff or worry about remote employees again
- No more review meetings or scoring assessments
- Always be in the know of who is doing what, which initiatives are progressing, and which are not
- Explore ways in which to harness this new mindset with incentive compensation structures

Lisa Tierney, CLSC, an Executive Life Strategies Coach with over 20 years of experience working with CPAs will share with you the lessons learned to help you develop into the best leader you can be so you can enhance and improve your vision - and culture – to ensure you thrive.

Who Should Attend:

CPA Firm Administrators, HR Professionals, Managing Partners, COOs and CEOs

A Perfect Recipe Revealed: The Key Ingredients of an Effective, Results-Driven, Niche-Focused Marketing Plan

Program Description:

In today's marketplace, you will find yourself sitting across from a more sophisticated buyer than ever before. Company presidents and CFOs can discern whether you are an expert in their industry and have more access to a larger circle of potential service providers. We have found that to win these prospects over, you must be able to establish yourself as an expert – an expert in providing the types of services they require AND someone who is intimately familiar with their business – the issues and challenges they face. Having a team of professionals that has resources that can serve a niche or industry above and beyond the general practitioner is a powerful way to generate higher dollar revenues for your firm (after all, experts can charge more) and you can increase your productivity by repeating specialized services and projects for many of the same type of client.

A critical aspect of the approach that will be explored in this program surrounds a very finely-tuned niche: the manufacturing niche that may have been explored now become a subcategory of bio-medical manufacturers; a healthcare niche starts to target cardiologists with more than 15 physicians. Wooing a specific group of buyers by harnessing the right tone, message and relaying specific success stories that will interest them is the key to attracting more of the same type of client. And that's what niche-focused marketing is all about.

Topics to be Explored during the Program:

- Working smarter, not harder, by wooing a consistent type of client
- Having more impact on a target audience than ever before
- Generating more opportunities with much less effort
- Confirming the origination source(s) of new business as it applies to this client
- Regained control over time and commitments
- Delegating activities throughout a niche team to "get more with less"

Marketing plans that focus on a small group of consistent professionals who are dedicated to a specific industry has proven to yield the most results with less effort in recent years. Although you have heard this term for years now, it's time you learn how to apply this concept at your firm. Learn the secrets of niche-focused success!

Who Should Attend:

Professional services providers, Marketing & Business Development professionals

Relationship Selling: Understand & Adopt Strategies of Successful Rainmakers

Program Description:

What if you could learn, understand and truly INTEGRATE proven methodologies that have been successfully applied to growing professional services firms?

This webinar will explore the attributes of Rainmakers and offer real tools and techniques that can be applied at your CPA firm at all levels, including partners and mid-level staff.

A recent study conducted by TIERNEY Coaching & Consulting, Inc. identified the emphasis on **business development** as the top-ranking key performance factor today for accounting providers. For your CPA firm to flourish, all accounting professionals need to become aware of how they can personally contribute to the growth of the practice. This webinar will explain proven methodologies that have worked for decades in a way that they can be learned – and adopted - by all professionals. Successful case studies of CPAs who have successfully undergone radical transformations regarding their business development efforts will be shared.

Attendees will learn:

- A must-have list of Key Traits / Attributes of Top Sellers of professional services, as well as practical tips on how those attributes can be adopted through practice
- How to become fluent in sales knowledge (demonstrating service knowledge, understanding clients' needs, offering solutions)
- The importance of goal setting, as well as having a plan
- Options that can be applied (personally... starting today) to make an impact
- The importance of evaluation, accountability and continuous improvement

Can EVERYONE at your firm be turned into Rainmaker? This webinar will help to you honestly assess IF and HOW your professionals can develop strategies to become more effective at growing the practice – which translates into Relationship Selling.

Who Should Attend?

Professional services providers, Marketing & Business Development professionals

Understanding Group Dynamics that Affect Partner Accountability, Unity and Productivity

Program Description:

The AICPA's Private Companies Practice Section issued its annual diagnostics report which showed that, for the fifth year in a row, shareholder / partner unity and accountability remain in the forefront as a top issue for both smaller and larger firms.

The report concluded with three recommendations to address these issues, each of which will be covered in this presentation, as follows:

1. Develop a culture of performance and accountability
2. Grow and develop leadership skills and...provide time for owners / partners to focus on strategic planning that connects on a deeper level
3. ...Engage all partners in developing a unified forward-thinking vision as part of strategic planning...

Topics to be Explored during the Program:

- Understanding the stages of development around groups – including how to identify at which level your partner group is operating – can offer insight into what you need to do to elevate your development. This insight into how groups work will address general expectations around timelines, verbal behavior, how perceptions of group members correlate with the effectiveness of the group – and what it will take to achieve productivity.
- Learn what role the personality of the leader plays in the success of the group and what personality traits can feed dysfunction; we will also share how these detrimental traits can be overcome. Participants will also learn where to look for the most dependable feedback surrounding the effectiveness of your leaderships team/s
- We will offer alternative methods by which you can establish *and maintain* a heightened sense of awareness around the teams / group activities and progress and how to have that permeate throughout your entire organization

Who Should Attend:

Professional services providers, Marketing & Business Development professionals

Tricks of the Trade: Coaching Accountants to Success

Program Description:

Staying focused on marketing efforts when you have an accounting practice to run seems impossible at times! But without focus, you may be resolved to irregular and inconsistent efforts which are a waste of time, money and discouraging to all involved.

Address what's been long-missing from professional services marketing: Accountability. The art / science of coaching fosters the necessary change agent that get professionals "unstuck" – enabling them to stop engaging in the long-term behavior or attitude that is clearly no longer serving them; conversely, it will enforce an ability to finally participate in a more favorable (or required) behavior that is desired but, for whatever reason, seems impossible to adapt or learn.

This highly interactive workshop demonstrates the successful tools & techniques that coaches use to keep CPAs focused and on track, so they can achieve their goals. It also enhances all areas of business communication by clearly defining the parameters around all meaningful business conversations.

Topics to be explored during the Program:

- Establishing rapport
- Mirroring concerns/identifying issues
- Assessing conflict
- Identifying limiting beliefs and self-imposed obstacles
- Asking thought-provoking, open ended questions
- Active listening
- Shifting Perceptions through understanding brain hemispheric dominance and integration
- Moving from the problem toward the solution

By harnessing the methods professional coaching, you can assist your firm with improving morale by empowering staff, assisting your professionals with achieving their goals and increasing the firm's bottom line.

Who Should Attend:

Professional services providers, Marketing & Business Development professionals

A Truly Unique & Empowering Approach toward Customized Personal Marketing Plans

Program Description:

Learn a proven, unique approach that empowers professional service providers to co-create their own unique, individual marketing plan - instinctively connecting what's PROFESSIONAL with what's PERSONAL - which is the key to pulling the emotional trigger of "the buy" of a professional services provider.

After many years of providing top notch marketing advice to professional service providers, we have developed a process that helps individuals unlock their key motivators and identify/address perceived obstacles in a straight-forward manner. The result is a concise, comprehensive, laser-tuned marketing plan that will be easy for the professional to execute and one that he/she will enjoy.

Topics to be Explored during the Program:

The marketing planning process that we will share will offer:

- Understanding the need for an intersection of the professional with the personal
- Regaining control of your time and commitments
- Why you should only do *what you want to do* to grow your practice
- How laser-tuned focus ensures you get more by doing less
- Accountability to yourself – and no one else
- The gift of revealing your true genuine self
- Crafting the proper tone of a compelling message that deliver unquestionable value
- Improving your overall professional experience!

Would you believe that, in just a few hours, you could develop a comprehensive, long-term customized marketing plan perfectly tailored to highlight your strengths, remain in your comfort zone and stay focused on attracting only your ideal client? Learn the secrets to our success!

Who Should Attend:

Professional services providers, Marketing & HR professionals

Public Speaking and Presentations Skills Training – an interactive, participatory workshop

Most CPAs today realize that professional service providers can grow their practice when they are able to eloquently demonstrate their high level of expertise. Providing informational presentations to your target audience is a very effective way to establish yourself as an expert, foster rapport with decision-makers and develop long-term relationships with those “in the room” – *when you know what to do and how to do it*. Conversely, giving a boring or poor presentation can hold long-term negative ramifications that can hurt yours – and your firm’s – reputation. Most accountants at all levels are being asked to contribute to the success of their firm through some form of presentations – internal CPE, pitching a prospective client or addressing small groups in some way or another. But few CPAs possess polished skills when it comes to creating outlines, delivering key points, telling engaging stories, appropriately using audio-visual aids (such as PowerPoint) and most importantly, engaging in pre and post event activities, which can significantly leverage your speaking opportunities.

Topics to be Explored during the Program:

- Crafting a concise, meaningful introduction
- The basics of compelling story-telling
- How to engage audience participation
- Relaxation Techniques to calm the nerves
- Creating an outline
- Delivering Key points
- How to pitch your presentation so you get in the right room
- What to do before and after your presentation

As they say, practice makes perfect. My goal will be to create a safe, open environment for all attendees interested in polishing their skills to come together and learn with *and from* each other to reach their potential when it comes to speaking and presenting. I am prepared to share my many tips and tricks which will support attendees to feel ready, willing and able to address small groups while pitching accounting services at prospect meetings or to engage larger audiences while confidently sharing meaningful information during informational seminars.

Who Should Attend:

Professional services providers

Stop the Fire Drills! Improving the Proposal Process at Your Firm

Program Description:

Every firm produces proposals regularly, but the process can be inconsistent and challenging, often resulting in scrambling to make deadlines and/or delivering a weak bid package. Join us for this interactive discussion to discuss critical and sometimes forgotten aspects of the proposal process. Gain tips to streamline your process before, during and after that proposal is signed, sealed and delivered to the prospective client.

Topics to be Explored during the Program:

- Learn step by step what and how to secure prospective clients by ensuring you are aware of and ready to address their needs.
- Learn how to effectively solidify your connection with the decision-makers and demonstrate the value you and your firm can provide.
- We will explain the top ten areas of focus around your proposal of services....and many of them have nothing to do with the actual document referred to as the "proposal"!

Just incorporating a few of these tips can make a difference in soliciting that next client!

These techniques will help any firm improve its closing ratio.

Who Should Attend:

Professional services providers, Marketing & Business Development professionals

Shifting Your Mindset from Accountant to Advisor

Program Description:

Lisa Tierney, CLSC is an Executive Life Coach with over 20 years of experience working with CPAs will share with you how you can elevate your CPA practice into advisory status – serving as a true financial analyst or business advisor. This can result in higher dollars and profits, increased satisfaction with your client relationships, assist with attracting higher caliber talent and an overall improved professional experience.

Topics to be Explored during the Program:

- Learn why NOW is the Crucial Time for CPAs to Elevate Rise to Advisory Status
- Understand and Identify the Benefits of an Advisory Client Relationship – from the perspective of your clientele
- Learn How to Elevate into a Role of an Advisor – It's so much easier than you might think!
- Learn How (and when) to Teach Others to become Advisors – including those you work with – including your clients!
- Hear the real-life case studies / success stories of other CPA professionals who have achieved "advisor" status
- Gain more Confidence than ever before on How to Lead your firm toward Advisory / Consultancy

Who Should Attend:

Professional services providers (of all ages), Marketing & Business Development professionals

Women Empowerment at Work: Female CPAs Create Your Own Success

Women Empowerment at Work: Create Your Own Success was written by certified executive life coach, Lisa Tierney, who worked in male-dominated corporate environments for many years. Lisa has coached many professional women and realized the universal nature of the challenges being faced. Since removing herself from the corporate environment, she received a high-level education in life coach training – as well as life experience – that enabled her to eloquently and succinctly explain how professional women can avoid the most common pitfalls around creating their own success at work.

Readers have applied lessons learned the very next day with stellar, career-changing results.

Attend this workshop to do the same.

Topics to be Explored during the Program:

- Command the respect of your superiors and colleagues from a natural, consistent place of genuine integrity
 - Practice a method of assertion that attracts your ideal situation without alienating or intimidating others; in fact, you will engage those around you
 - Craft power statements and ask power questions that motivate others and create an immediate impetus for change
-

I followed Lisa Tierney's process for identifying what you want that is covered in the first chapter of her book "*Empowerment at Work: A Guide for the Professional Woman.*" I chose more revenue as my primary want. Two days later, I find out that a colleague of mine referred me for a large, lucrative project! Maybe that was coincidence, but maybe it was because I declared what I wanted. Read this book to gain greater empowerment and achieve your goals.

- Judy Weintraub, CEO SkillBites LLC

Who Should Attend:

Women professional service providers

Women in Leadership: Closing the Gender Gap

Uncovering hidden – and not so hidden – biases has become, fortunately, a hot topic throughout corporate America. We all recognize the many areas around bias that affect our world – but *what are we to do about it?*

This interactive, highly-participative workshop explores the subtle nuances around how men and women interact which can result in a dysfunction that some describe as the “gender gap”. Our goal is to help participants understand why these gaps exist and start to bridge them.

Topics to be Explored during the Program:

- **Motivation** – is very different between the sexes, causing a result in different, often conflicting behaviors.
- **Gender Communication Differences** - Women and men often see and hear things differently. They also differ in the way they communicate and influence.
- **Gender Differences in Leadership Styles** - Because men and women differ psychologically and in the way in which they communicate and influence, they also differ in their leadership styles.
- **Sexism / Abuse/ Bullying** – For years, there have been complaints about mistreatment of an employee by one or more other employees, as defined by conduct that is perceived to be threatening, humiliating, or intimidating – and may include accusations of work sabotage or verbal abuse.

Participants may be asked to take the Harvard gender-career IAT (implicit association test) during or prior to the presentation to identify any deep, hidden subconscious dynamics at play. Attendees will examine current statistics and limiting beliefs about the genders and be given a peek at some recent examples of how gender bias manifests. Finally, participants will be given tips to avoid biased behavior in their workplace.

Who Should Attend:

All professional service providers – men and women

Best Practices: 10 Best Ways to Retain Talent at your CPA Firm: Evaluate and Elevate

Program Description:

There presentation is devoted to drilling down proven methodologies for talent retention. The key to success and longevity in today's competitive environment begins and ends with retention. Retaining key employees is a critical financial, as well as strategic, consideration for your CPA firm. Join us as we explore each of the 10 best practices that will help you retain key employees by hiring, communicating, and coaching with intention. Leave this session with skills and tips that will help you lead and develop your team with success.

Topics to be Explored during the Program:

- Learn to perform each best practice at a high level
- Learn effective recruiting and hiring strategies
- Understand key elements of staff development, coaching, and mentoring
- Learn to communicate the path to partner and to prepare for successful internal succession
- Explore how to create a healthy firm culture that provides appropriate learning and growth opportunities for all staff

In today's tight talent market, it will be imperative to understand and address the issues surrounding talent retention at your CPA firm.

Who Should Attend:

Managing Partners, Human Resources professionals, COOS / CEOs

Best Practices in CPA Leadership: Understanding & Enhancing your Firm Culture

Program Description:

There is no doubt that the biggest hurdle faced by CPA partners – seasoned and new partners – remains the challenges around leadership - which are understandably exacerbated by the unique nuances that exist within a shareholder group. Of note is how the accounting profession rewards good performance – CPA professionals are promoted into roles of management for which they have no, or little training – and, in some cases interest. An average firm’s environment consists of a vast array of different types of people with a variety of skillsets, beliefs, opinions, and personalities. Perhaps we wouldn’t normally CHOOSE to spend so much time with each other but for the fact that we are all members of the same team. A successful leader is able to bring together all members on the same path toward a well-formed outcome that serves the greater good for all (the firm, its professionals and clients, too).

Now is the time to:

- Understand and adopt the main objectives of every successful leader
- Explore different approaches of culture – and determine which one your firm is currently using
- Embrace then enhance this already existing culture
- Learn how to build alignment among the team
- Empower others to contribute to the success or growth of the firm in a meaningful and effective way
- Learn the importance of – and how best to – enhance the firm’s reputation and brand
- Learn the most importance areas of focus and receive specific ideas on how to drastically improve each area
- Gain more confidence than ever before about how you lead!

Lisa Tierney, CLSC, an Executive Life Strategies Coach with over 20 years of experience working with CPAs will share with you the lessons learned to help you develop into the best leader you can be so you can enhance and improve your vision - and culture – to ensure you thrive.

Who Should Attend:

CPA Partners, Managing Partners, Marketing & HR professionals



Lisa Tierney, CLSC is an award-winning marketing consultant and a certified life strategies coach with twenty years of experience in serving multi-partner professional services providers across the U.S. She has provided webinars, teleconferences, workshops and keynote presentations for such organizations as the Association for Accounting Marketing, the International Coach Federation, the PICPA, the Association for Accounting Administration, the Institute of Management Accountants, to name just a few. She is a member of the CPA Leadership Institute's Leadership Panel and an active member of the International Coach Federation. She has been published in numerous publications, including *Accounting Today*, *Legal Intelligencer*, and the *Philadelphia Business Journal*.

Lisa is a sought-after speaker and workshop facilitator and published her first book for professional women in 2015, entitled ***Women Empowerment at Work: Create Your Own Success***.



Georganne Ford, PCC has over twenty years of experience in sales management, leadership development, and operations management. She helps leaders build better teams for increased revenue and increased engagement among individual team members.

“As a leader myself, I know the importance of investing the time to continuously grow ourselves professionally and personally,” she says.

She has been coaching professional service providers for a long time and understands the unique nature of CPAs and attorneys, as well as the cycles of their practice and the challenges around shareholder groups and managing staff. Her innovative, instinctive style of coaching produces fabulous results!