

on-site  
TRAINING options 2016-17

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# On-Site Training

Maximize learning and minimize downtime.

**We come to you.** We want CPAs in Massachusetts to have the best learning experiences. That's why the MSCPA provides customized CPE programs through our On-Site Training. It's a flexible, cost-effective option that allows you to train as many or as few employees as you need—from a single team or department to everyone in your organization.

**Train two employees for the price of one! To find out how, contact Julia Ekelund at [jekelund@mscpaonline.org](mailto:jekelund@mscpaonline.org).**

## How does it work?

Courses are customized for your business, so your teams will learn with real-world, goal-specific examples that will help your business grow. There are no travel expenses, and programs are delivered from industry experts when you want them—at your offices or at a location of your choice. With more people where you need them, you'll increase productivity and keep projects moving. You provide the space, and we'll take care of everything else.

To find out what's available in your area or to put in a request, contact: Julia Ekelund at [jekelund@mscpaonline.org](mailto:jekelund@mscpaonline.org).



### **Giving Voice to Values**

Are you familiar with GVV—the process of teaching individuals how to develop a strategy and use scripts to successfully address a values based challenge? In this session, we will cover how to establish a systematic approach that will help us address both commonplace and extraordinary ethical challenges. Attend this session to learn the framework that allows for repeated practice and to become a natural at speaking out!

### **Living with the Foreign Corrupt Practices Act (FCPA)**

Motivating and influencing appropriate employee behavior is important at any workplace. This course will use the FCPA as a guideline to understand how to stimulate proper employee behavior and corporate codes of conduct/ethical behavior. We will delve into the occurrence of corruption worldwide and start to understand the locales where their organizations are doing business. Lastly, we will end with a discussion of typical situations where an employee could ‘cross the line’ such as with gifts, gratuities, payments, entertainment, conflicts of interest and related matters.

### **Cases in Corporate Ethics - Discuss Real Life Conflicts**

Real life conflicts are just what they are made out to be—real. We will examine eight cases in corporate ethics drawn from real-life business conflicts involving corporate financial managers. Take this course and take the opportunity to have a lively group discussion of real world, ethical dilemmas.

### **Ethics in Action: Protect and Defend**

We’ve all made “poor” decisions in our time—but making a poor business decision is something we must avoid at all costs. This course will focus on how we as financial professionals should handle a crisis situation that stems from a poorly made business decision(s). We will learn about recent corporate misdeeds, the problem of over-reliance on government solutions, how we can restore trust in business and protect the integrity of our profession, the problem of “short-termism” and the need for “patient capital” and more.



## **Ethical Leadership: Power, Influence, Integrity and Trust**

It's been stated that without trust, there is nothing. If you think about it, how can one be an ethical leader if they don't have any ethics? Trust is a top prerequisite for principled and ethical leadership. In this session, we will address the most important concepts for building and maintaining both trust and integrity in business, the risks and consequences of misusing power and why "winning" so often really means losing. We will then examine the AICPA Code's Integrity Standard and other professional standards pertinent to appropriately exercising power and influence.



### **Business Writing for Accountants**

Are you someone who dreads writing? Well, we are hoping to change that! This course will provide attendees with the tools and skills to write letters, memos, emails, reports, and technical documents that are interesting, accessible, and loaded with exactly the information readers' need. We will transform the process of writing from a dreaded chore to a creative and productive activity.

### **Business Communication**

The pathway to building trust and credibility stems from knowing how to listen, speak and write effectively—especially with colleagues and clients. There are various forms of communication that can help business professionals create long-lasting relationships that may lead not only to personal improvement, but also improvement of the bottom line. Designed for accountants in public practice and industry, major subjects will include personal credibility, better listening, networking, leveraging connections, writing articles, white papers and blogs, using social media to generate interest, deepening connections and improving speaking skills.

### **Essential Public Speaking Skills Workshop for CPAs**

For those of you who dread public speaking, this course is for you! Learn how to engage and delight an audience through public speaking by joining us in examining strategies and tactics to effectively manage public speaking anxiety and project confidence. After a discussion of the issues, each participant will have several opportunities for “mini-presentations” and will receive real-time feedback.

### **Communication as an Essential Leadership Skill**

Effective communicators know how to craft their message in a way that makes sense to their audience. They not only avoid being misunderstood, but are more effective in building solid relationships and persuading others. By completing the Communication Styles Diagnostic participants first discover the rules that guide their own communication, work styles and decision making. This self-knowledge becomes the basis for becoming effective when interacting with people who have different rules. Participants consider key strategic relationships (colleagues, customers, bosses) and develop strategies of flexing to their audience's style, explaining their own style (to avoid misunderstandings), or negotiating a middle style.



### **Influence without Authority: Overcoming Organizational Politics**

Because of the complexity of today's organizations (including reporting structures, speed, "doing more with less"), individuals need to use influence in order to get the resources they need to complete their responsibilities and achieve their goals and objectives. Those resources include financing, but often more importantly, the cooperation (time, energy, attention, expertise, support, approval) of others. This session enables participants to understand how to build the power, credibility and 'credits' on an ongoing basis to build their 'base of influence'; and most effectively articulate the actual "ask".

### **Creating Credibility and Authority When Presenting**

Public speaking is a well-established fear among most individuals. The goal of this session is to provide powerful strategies for establishing credibility and authority when presenting through speech structure and body language. Participants prepare a 5-minute presentation beforehand and then are recorded on their iPhones. They receive feedback on their presentation from the group, the instructor, and by seeing themselves.

### **Technically Speaking: Writing and Presenting Effective Technical Information**

Ever write an article or give a presentation where your audience has a hard time absorbing the information? Well technically, you're not the only one! This course will educate us on why the explanation of technical information is often crucial to the outcome of a presentation. Want to make your hard work easy to remember and impossible to forget? Those who attend this session will leave the classroom knowing how to explain technical information to an audience to help them better understand and remember it. We will learn how to communicate efficiently and tactfully with clients, direct reports, colleagues, bosses and senior management even when out of our comfort zone.



## **Global Business Management: Communication Issues in a Diverse World**

Cross-cultural communication may be hard to adept, but not impossible. Learn about the issues that affect cross-cultural communication and how to successfully work within a global environment. In this communication skills seminar, we will also learn how to improve our image through the increased self-awareness we'll gain. The key topics in this course include: cultural challenges in the workplace, cross-cultural communication styles, differences between cultural stereotypes and cultural generalizations, the elements of verbal and nonverbal communication, how to identify the characteristics of the individualistic and collectivistic cultures, how to meet expectations and protocols, culture clash and how to avoid failed communication.

## **What Is Integrated Marketing Communication (IMC) and How Can It Help Your Organization?**

Did you know that Integrated Marketing Communication (IMC) has been one of the most widely discussed topics in marketing within the past 10-15 years? This workshop will teach business owners and managers the fundamental components of IMC and how it is presented within a number of contexts, including for-profit and not-for-profit; local, national, and international; consumer and business-to-business goods and services, etc. Attendees will also become familiar with the components of online communications programs. The key topics in this course include: IMC (what it is and how it impacts the bottom line), differentiating between IMC and advertising, the broad scope of IMC activities, how to work effectively with the media: avenues of publicity, and how to deal with other pertinent publics.



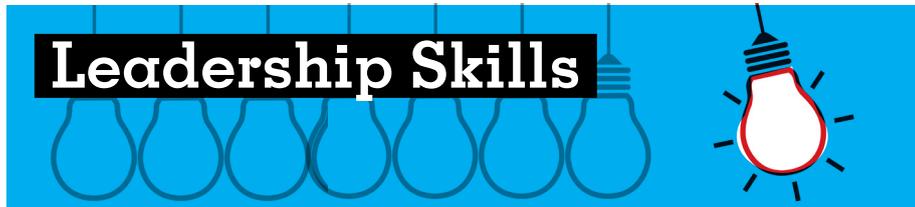
## **You Said *What?* Communication and Relationship Building Skills for Success**

Do you have what it takes to be a “conscious communicator?” Come to this workshop to find out and discover the basic competencies critical to solid work relationships—and career success.

By learning how to analyze situations and consciously select and use productive communication strategies, attendees will return to work better at building constructive and beneficial work relationships. We will leave this session no longer having any apprehension of making mistakes and creating conflicts in our work relationships. We will know how to identify strengths, weaknesses and opportunities and understand values, beliefs, attitudes and perceptual processes along with emotions and how they translate into emotional intelligence.

## **Presentation Skills**

This workshop enables participants to more effectively deliver a message to an audience—any message, any audience. We start by identifying the two components of an effective presentation—content and delivery—and then move on to teach skills that can make each component stronger, further supporting the participants’ ability to deliver a message to their audience. Many presenters feel that the content is the real battle. But organizing the facts is only one piece of the puzzle, and often the easier piece. A presenter’s delivery skills impact the image and understanding the audience has of both the presenter and the message being communicated. This workshop will also explore audience interaction: ways to encourage and use participation, and ways to minimize the potential problems such audience involvement introduces, such as crowd control and time management.



### **CPA Firm Management and Leadership Skills:**

#### **Day One, People**

Empower your firm's established and emerging leaders to develop a culture that maximizes employee potential across the generational landscape—Millennials, Gen-X, and Baby Boomers. In this course, you will learn how to effectively manage your firm's people resources, motivate exceptional effort, and resolve conflicts and misunderstandings that interfere with productivity and profit.

### **CPA Firm Management and Leadership Skills:**

#### **Day Two, Process**

This session focuses on how firm leaders and managers can develop improved structures for getting employees to work together cooperatively and communicate with each other effectively, mentor star performers and obtain measurable results.

### **Exploring Leadership Potential**

Through interactive exercises and creative self-diagnostics, participants learn about leadership. Disconnect leadership with a defined role and instead position leadership as behaviors that every person in an organization can do. Help individuals identify how they have already practiced leadership, but may have not labeled it as such. The module can include a 360 degree on-line instrument to provide feedback on the participant's current practice of leadership. Participants are lead through analyzing their data and strategizing for development.

### **Exploring Vision and Leadership**

Many individuals claim they do not have a 'vision' and so cannot be leaders. I assert that people do have a vision (for what they want to accomplish) as evidenced by what they have in mind as they solve problems, make plans, and negotiate.

This session will make the concept of 'vision' accessible and help people see they already 'do' vision. This session will lead people through a process by which they articulate their vision and then get other people excited about it.

## Leadership Skills CONTINUED



### Exploring Power and Leadership

A critical component of leadership is developing the power to influence people. Yet for many individuals, the use of power is often equated with manipulation or command and control.

This session will focus on the multiple sources of power; particularly sources they are unaware of and have not tapped. Through a very powerful and engaging experiential exercise, participants experience power dynamics, and test out their own ability to use different power sources to influence others.

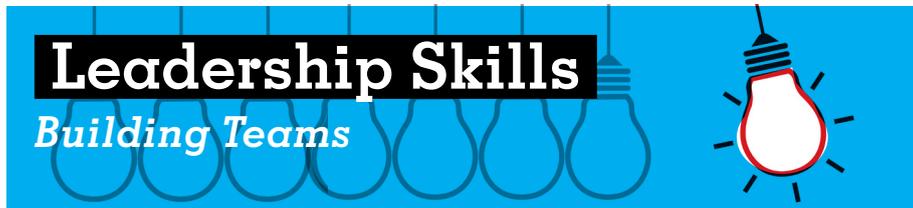
### Managing Gendered Perceptions of Leadership

Because leadership is often defined in masculine terms (decisive, competitive, ambitious), women often face the difficult decision of how to act like a leader when doing so is in conflict with social expectations for her behavior as a woman.

This session will increase women's understanding of this dilemma; enable the participants to identify the strengths they bring to an organization and speculate how the use of those strengths may be misperceived when viewed through a 'gender lens.' Finally, the session will equip women with strategies for enacting leadership, bringing their strengths to the table, while managing the perceptions of others.

### Facilitation Skills

Facilitating a meeting is more than simply keeping time. It involves leadership, presentation, and negotiation skills. This workshop gives participants the blueprints for facilitating a successful meeting—everything from setting up the meeting materials to ending the meeting on time and on topic. Audience interaction is one of the most vital elements of a meeting's success, but facilitating the conversation can be an elusive goal. This workshop gives you techniques that make negotiating the group dynamic much simpler. Learn skills to help overcome the myriad of issues that can arise in a meeting—specifically, how to get the group to follow the message presented, how to change the topic flow when needed, and how to run a successful question and answer session.



### **Leading Teams 1: Optimizing Your Resources**

This session examines when to use teams, how to assemble an optimal team with diverse resources, and how to build the infrastructure needed for efficient interactions between team members. A structure for building and then monitoring teams for optimal outcomes is examined with practical applications.

### **Leading Teams 2: Creating Team Norms**

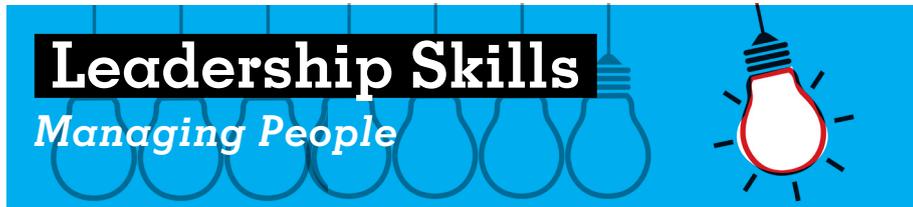
An experiential exercise demonstrates the potential conflict when teams do not establish norms and expectations for each team member. The session then explores ways of bringing a team to agreement on how they will work together.

### **Leading Teams 3: Establishing Leader and Members**

This session explores the impact that different styles of leadership can have on team output through an interactive game; participants then diagnose their own leadership style and identify when to use that style or when adopting another style is optimal for results.

### **Leading Teams 4: Accountability for Continuous Improvement**

An essential element in continuously improving a team's effectiveness is through providing feedback, both at the team level and at the individual member level. Teams and individuals grow and improve only when they understand what they do well (so they keep doing that!) and what they need to change. Yet most people are uncomfortable in giving feedback, and instead avoid problems, hope the problem goes away on its own, work around the problem, and become increasingly frustrated (and unproductive). The goal of this session is to help not only team leaders but all team members to overcome their reluctance to giving feedback by mentally reframing the process, and by providing numerous strategies for holding productive developmental conversations.



### **Feedback for Building Performance**

In virtually all cultures, when people hear ‘feedback’ they immediately think of criticism and negative reviews. No wonder many managers avoid giving employees feedback on an ongoing basis, and often rely on the annual performance review to do so. Yet by not considering feedback as a critical coaching skill, managers lose the capacity to build good relationships and help employees continuously grow and contribute. This session will help participants reframe how they think of feedback (as a means of motivating them to do so more often). Participants then apply key steps for conducting a feedback coaching conversation with an employee (or anyone) whose performance is critical to the organization.

### **Leading People through Change**

Change is essential for organizational survival and growth. Yet as individuals we each react to change differently. This session enables participants to understand their own ‘change style’ and how to manage others’ with different styles through change. An experiential exercise demonstrates the impact of the different roles involved in change: the strategists and the implementers. Participants can apply the change model to an upcoming change they will be leading in their own organization.



### **Excel Best Practices**

Ever hear someone say, “I love working in Excel?” Probably not. This course will help you gain an in-depth understanding of the best ways to work with Excel by learning the best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel and reporting on data contained in Excel. Since today’s best practices for Excel differ significantly from those used in the past, we will learn the best ways to utilize Excel to its fullest potential.

### **Excel Financial Reporting and Analysis**

This course will help you exceed in Excel and teach you how to deliver accounting and financial solutions in critical areas such as formatting reports and financial statements using advanced techniques, assembling and printing reports, and more. We will discover our options for combining financial data from multiple sources, how to create Excel visualizations to improve reader’s understanding of financial information and advanced data analysis techniques such as PivotTables connected in real-time to accounting database. In addition, we will also uncover many hidden features to help prepare computationally accurate and aesthetically pleasing reports in a short amount of time.

### **Excel PivotTables for Accountants**

What is the power of PivotTables? This course will examine how to build PivotTables, how to group data inside PivotTables—including grouping options for fiscal periods and how to create user-defined calculations in PivotTables. We will learn advanced PivotTable techniques, including how to build PivotTables that consolidate data from multiple data ranges and PivotTables dynamically connected to external databases and financial accounting systems. We will also learn how to take advantage of other Excel features associated with PivotTables, including Slicers, Power Query and Power Pivot.

### **Excel Tables and Data Models**

Harnessing the power of Excel is not easy—in fact, it has been deemed quite difficult for many. In this course we will learn how to efficiently manage, analyze, and report in Excel, focusing on tables and data models that allow us to process large volumes of data into dynamic reports and analytical elements with unsurpassed ease, accuracy and speed. Discover why tables should revolutionize how we work with data in Excel, including serving as dynamically re-sizing ranges of data, providing a simplified means of writing formulas and facilitating quick and easy sorting of large volumes of data.



## **Excel Tips, Tricks and Techniques for Accountants**

How fast can you learn Excel? This course will teach more efficient and effective ways to work with Excel, and will introduce countless tips, tricks, and techniques to improve general level of productivity, and reduce the amount of time spent on mundane tasks, such as formatting and customizing Excel for greater accuracy and efficiency. This highly acclaimed course draws on over twenty-five years of experience in delivering spreadsheet training to accounting and financial professionals, which assures the relevance and usefulness of the information and guidance provided during the program.

## **Advanced Excel Reporting**

Advance your skills in Excel! This course will examine how to build advanced Excel reports, including reports where the source data resides in accounting software or another database. We will also learn how to use Open Database Connectivity (ODBC) and Online Analytic Processing (OLAP) to connect Excel to external data sources, such as accounting software database to extract data for reporting and analysis. In addition, we will learn how to incorporate PivotTables into reporting routines and the best practices for presenting compelling and captivating Excel-based reports and charts.

## **Advanced QuickBooks Tips and Techniques**

Learn how you can take advantage of many of QuickBooks' new and advanced features to solve important issues. Learn about the advanced inventory management techniques, including the ability to change the default costing methodology in QuickBooks, and implement lot and serial number tracking. We will examine how to build complete sets of financial statements in Excel that link in real-time to underlying QuickBooks data files and how to create multi-company financial statements. Additionally, we will learn how to put the Client Data Review feature to work to streamline the process of identifying and correcting errors and closing accounting periods in QuickBooks.

## **Do It Yourself Business Intelligence**

Every day we are faced with many financial and operational reporting issues. In this course, we will learn how to use Microsoft's Power "business intelligence" (BI) tools to solve many of these problems. More specifically, we will learn how to leverage our existing understanding of Microsoft Excel to harness the power of tools such as Power Query, Power View, Power Map and Power Pivot. We will gain insights into our data that can help us make more informed and more profitable decisions while still retaining full control of our data.



## **Introduction to Excel Macros**

However much experience you have working with macros, this course will teach the fundamentals of creating and working with macros in Excel. Attendees will learn how to use Excel's Macro Recorder and learn how to write simple, yet effective, macros, how to secure and share macros with other Excel users, how to create user defined functions to solve specific accountant-centric problems in Excel, and more. We will also learn the basics of VBA, including many necessary elements to write macros that can make using Excel more effective and productive.

## **Microsoft Office**

If you are looking to work with Microsoft Office applications and data from multiple devices and platforms, then this is your chance to learn the best practices for doing so! In this course, we will learn how to use the collaboration features available in Office applications to collaborate securely with other team members and even external contributors. Additionally, we will learn where and how tools, such as OneDrive, OneDrive for Business, SharePoint, Zoho, and Google Drive, fit into the Microsoft Office Everywhere revolution!

## **Securing Your Data**

Do you use security techniques that aren't working to minimize your security threats? Well, then listen closely! In this session we will learn how to tune up what we know about protecting sensitive data. Learn about the latest tools and techniques for securing data, including encryption, virus protection, secure communications, electronic signatures, secure authentication and more. Participate in this program to learn how you can implement viable and practical solutions to mitigating today's security threats!