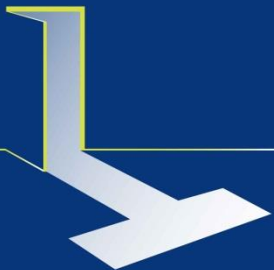


More Productive Leadership:

Delegate, Trust, Communicate (and more...!)

revealed by Certified Life Strategies Coach for CPAs,
Lisa Tierney, CLSC



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How & What Do Leaders Impact?

- ▶ Firm Profitability & Productivity
- ▶ Shared Vision & Alignment
- ▶ Accountability
- ▶ Motivating & Inspiring Others
- ▶ Positive Behavior / Mindset
- ▶ Staff Retention & Development
- ▶ Reputation of the Firm
- ▶ Firm Growth
- ▶ Focus (unwavering, on all of the above)

◦ *I know.... It sounds like a lot! But let's tackle it together...*



Sharing is (Mostly) Caring



How often do you ask yourself, “*What have I accomplished today?*” 1-2 times / week?

How many “unaccounted for” hours do you
LOSE each week? > **10-12?**

Do you spend **WAY** more time discussing
Problems instead of **SOLUTIONS?** Yes ☹️

Productive (Strong) Leadership

A strong leader will drive the **profitability** of a CPA firm by ensuring **high productivity** and efficiently managing the firm's resources (**people, technology and processes**) that sustain **alignment** of ALL toward its goals.



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Today's AGENDA

- Lead with Comfortable Confidence
- Preserve Focus & Energy
- Time Management that Achieves Results
- Communicate with Powerful Intention
- Delegation & Trust
- Master the Art of Saying “No”
- Explore Four Agreements to Change your Life



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Lead Naturally / Comfortably

- ▶ **Mentoring** (what to do / NOT to do)
- ▶ **Belief Statements** (and pre-suppositions)
- ▶ **Training** – (read articles, study opinions)
- ▶ **Permission to Succeed** – (on your terms)

Leadership cannot be taught – you may observe and learn how others lead, but this should serve in the purpose of you **developing your own leadership style** ... which is already innately built into your personality.



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Lead Naturally / Comfortably

Important Note: The aspects of leadership may seem elusive to some of you right now (or to others who are slated to take over) ... *Fear Not!*

Strong Leaders: Build Your Pillars of Fundamental Support / Assistance

No one can do everything
(or at least all at once)!

***That's why all strong
leaders build a strong
team around them.***



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Preserve Focus & Energy

We tell our clients – as soon as they come on board – to Think Large and Dream BIG.

Be Careful What You Wish For.....

*because you will get what you want – absolutely
...(and then some)!*



Polling Question #1 ... Tell Me What YOU Want?



What is the most important GOAL right now for you or your firm?

- A. Transitions of retiring partners
- B. Organic growth – dept / service
- C. Recruiting talent
- D. Developing / motivating staff

... (There is no “right” answer)



Contact Lisa Tierney, CLSC

To finetune this important PLAN around a desired goal, please send me a message with the word “Interested” in the subject line ... for a **30 complimentary coaching** session to help get you started (or finished).

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Preserve Focus & Energy

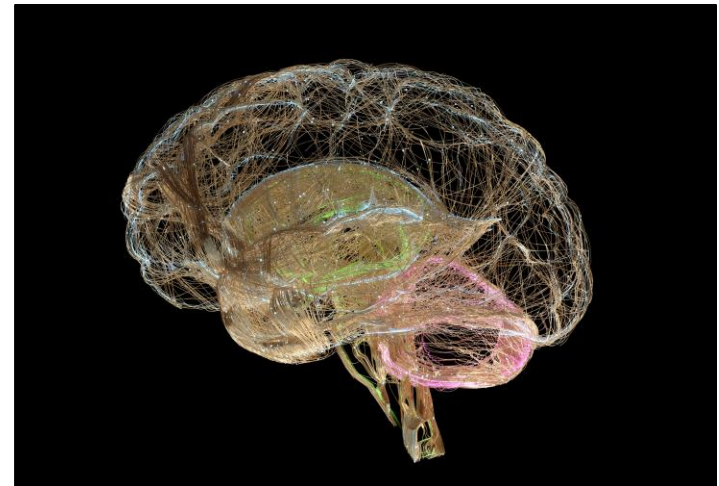
Big dreams and important goals deserve time and energy – along with a real PLAN – in order to be achieved.

- ▶ *Weekly / monthly meetings*
- ▶ *Rolling agendas that maintain focus*
- ▶ *Action items to sustain momentum*
- ▶ *Progress reports – outward and to all*



Time Management = Results

- Brain Science
- Biorhythms
- Commit / schedule work hours
- Shut down / being unattainable vs.
- Professor / Dr. office hours of availability
- Direct reports to regularly share progress
- Prioritize Yourself First



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Communicate – with Powerful Intention

Leaders know how to achieve alignment from the whole team. Their followers are educated, inspired, motivated and committed to working together to achieve results.



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How do Leaders Achieve Alignment?

From Group / Team -

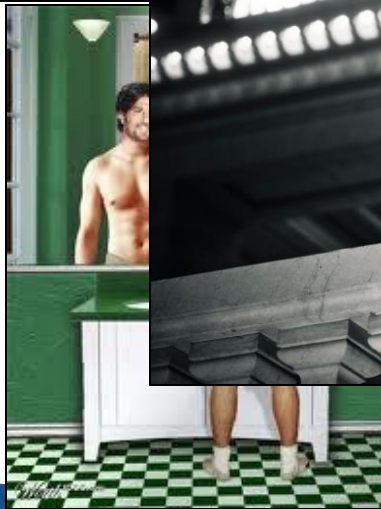
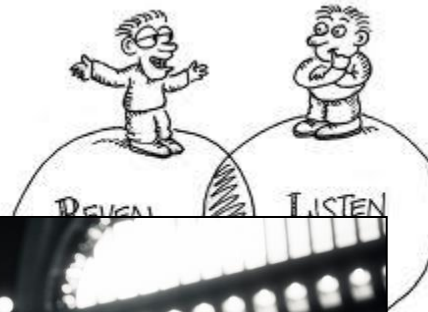


Leaders describe a well-formed outcome or ideal scenario that addresses everyone's benefit by illustrating personal benefit to all.

From Individual -

What Do You Want and
How Can I Help You?





All
Interactions
Can be
Perceived
from One
Of Three
Different
Perspectives:

Self, Other, or Observer



Developing A Plan of Action

A Well-Formed Outcome

1. What do you want?
2. When do you want it?
3. How will you know when you have it?
4. What aspects of your life will be affected by achieving this goal?
5. What stops you from having your goal?
6. What resources do you already have to achieve this goal?
7. What additional resources do you need to achieve this goal?
8. What is the first step in accomplishing your goal?



POWER Statements/Questions

Power Statements:

- Describe a well-formed outcome
- Address the emotional impact that achieving the objective (or goal) will have on the individual or group
- Bypass names or specific references to self (“I”, “John”, “None of us”, “My partners and I”)
- Exclude feeling words of the self (“hate”, “angry”, “drives me crazy”, “stupid”)



POWER Statements - Examples

- *"I wish we could stop wasting so much time in these meetings every month. I'm so sick of listening to Joe tell the same old stories and manipulate the conversation!"*
- *"I expect that we can adhere to the agenda today and keep the meeting at an hour maximum. Let's focus here so we can get back to work."*
- *"I can't believe you promoted Joe before me!! I was here first!"*
- *"I'd like to review my career plan to identify and agree upon expectations that will define my success here."*
- *(Tears swelling, heart palpitating, shoulders scrunched, fists clenched...)*
- *"No one speaks to me this way." or "Professionals here do not conduct themselves this way."*



POWER Statements/Questions

Power Questions:

- Set the stage for an objective, open-minded discussion
- Create a space of active, present listening and heightened attention
- Bypass references to the self (“I”, “We”, “None of us”, “My partners and I”)
- Exclude feeling words of the self (“hate”, “angry”, “drives me crazy”, “stupid”)
- Are very effective when mirroring back what was said previously (“So... I wouldn’t understand...?”)



POWER Questions - Examples

- *"You people really have to work harder and stop slacking off!"*
- "What would it mean to this division if we could generate \$500k more in revenues next year?"
- *"We tried your idea before – but it didn't work."*
- "Can you explain the reason it failed to us?"
- *"You just don't understand – your idea makes no sense?!"*
- "Can you tell me more about that – specifically...? Then, "Do you have a better idea? I'd love to hear it."
- *"I don't think you understand the way things work around here."*
- Mirror: "I don't understand the ways things work around here?"



Polling Question #2 ... Delegation Challenges



What bothers you most about delegation?

- A. I have no one to delegate to!
- B. I am responsible for the work
- C. My clients want ME to do it
- D. I hate when others dump on me
- E. I don't trust anyone to do as good a job as me



... (There is no “right” answer)

The Art of Delegation (& Trust)

- Hopefully, now you know more about the desires and intentions of your team and will feel more confidently about developing them (some of them, anyway)
- The Shadow of delegation is ... **Trust**
- You didn't always know what you now know....
- Don't others deserve a chance to grow to fail?
- Are You REALLY that important (*ahem*....!)
- If you only knew the affect it has on others to be bypassed...
- Imagine this professional is someone you love – a child or mentee ...
- Be generous give, Give, GIVE of yourself more!



And ...one more thing about Delegation



Delegation IS a two-way street!

As some of you may be resistant to delegating down lower-level work to others and giving away administrative and operational tasks even though you should ... many of you are allowing others to delegate – inappropriately to you....!



The Art of Saying “No”

Note: “No”

is a complete sentence.....

Consider not explaining, justifying, excusing yourself or others Try It! It's liberating and much easier than you think – you will be off the hook (when you let yourself off the hook!)



CHANGE / MANIFESTATION

"What surrounds you in life is a manifestation of what you think you deserve.

It won't work to "ask" to be treated a certain way by others; we have to require it in order to get it."



The Four Agreements

The Four Agreements: A Practical Guide to Personal Freedom was published in 1997 - written by Don Miguel Ruiz, a Toltec Indian

- ▶ Be impeccable with your word
- ▶ Don't take anything personally
- ▶ Don't make assumptions
- ▶ Always do your best



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1. Speaking with Impeccable Truth

- ▶ Be respectful of yourself and others
- ▶ Be clear – and speak plainly
- ▶ The Truth, The Whole Truth and Nothing But The TRUTH (accept All variations thereof!)



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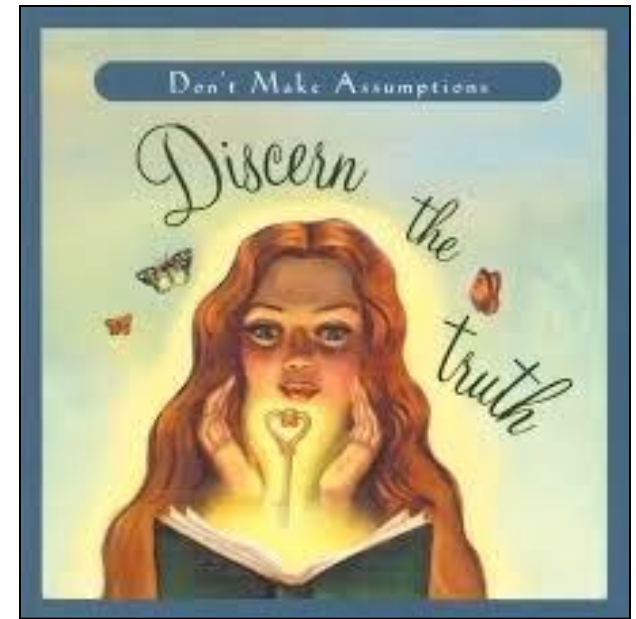
2. Never Take it Personally

- ▶ Understand possible personal agendas
- ▶ Be objective when asking a question
- ▶ Diffuse from emotion; use your breath



3. Don't Assume

- ▶ Ask questions for clarification
- ▶ Mirror the objective
- ▶ “Tell me more”....
- ▶ Identify any obstacles or objections
- ▶ Clearly define “success” or completion



4. Always Do Your Best

- ▶ Your best will change from day to day
- ▶ Your best will change throughout the day
- ▶ And so will others' best
- ▶ Ask yourself, "Is now the time?"



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Suggestions for USING / Applying these Four Agreements

- Book Club
- Workshop (facilitated)
- A 4-month program – a group picks one agreement to work on each month
- The buddy system

The *Four Agreements* heighten a state of awareness around communication and behavior...they really work!

(If you want a book, just ASK ME and I'll send you one.... 😊)



Contact Lisa Tierney, CLSC

To arrange for one complimentary
coaching session

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