



# Why the smartest accountants don't win

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OWN  
THE  
FUTURE

# Welcome!



Erin Daiber, CPA, PCC

Former Big4 CPA

Founded Well Balanced Accountants, LLC <sup>TM</sup> in 2013

Executive Coaching, Courses and Training for Accounting Firms

Creator of The CPA Exam Launchpad <sup>TM</sup>

Clients range from small accounting firms (~\$5M in revenue) to Top 100 firms across the US.

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- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **2 hours of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register



# Download Today's Resources







# Today's agenda

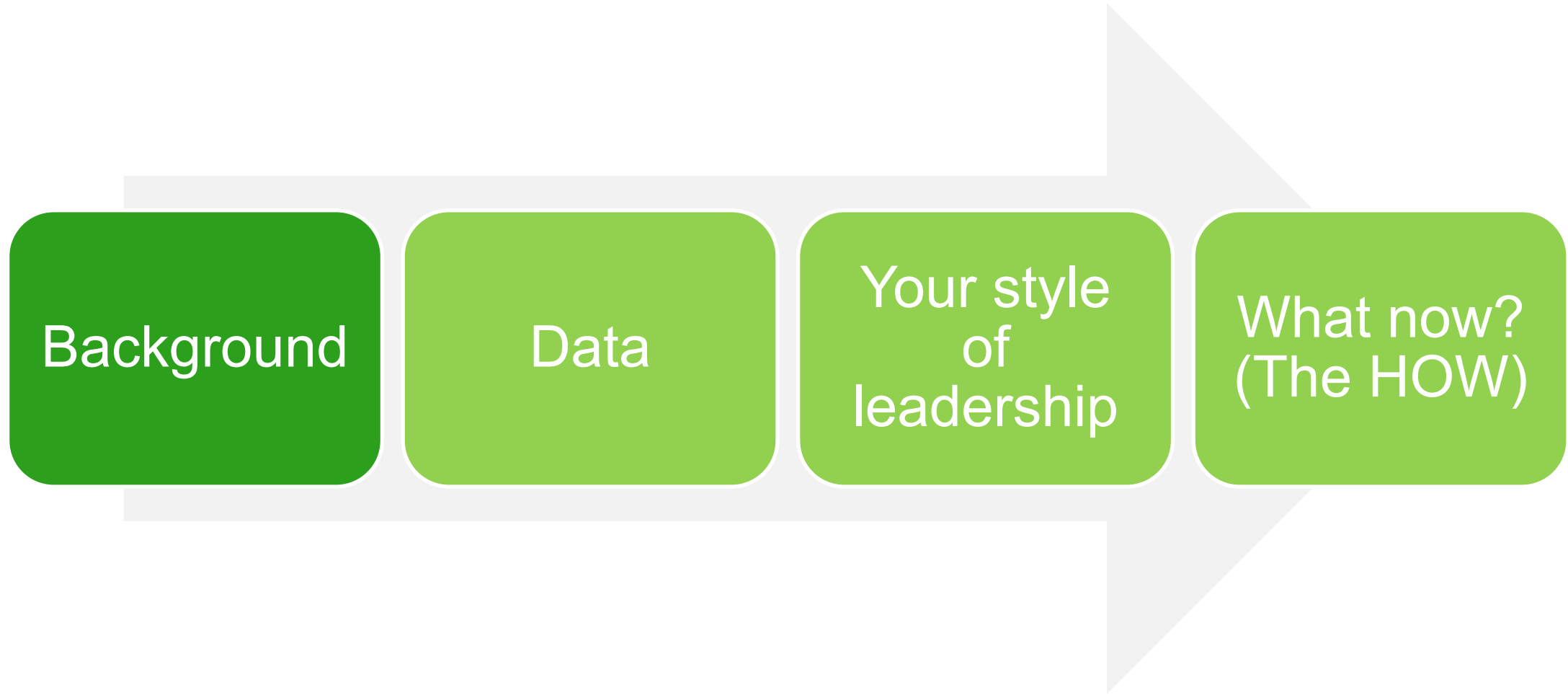
Background

Data

Your style  
of  
leadership

What now?  
(The HOW)

# The background





# 1988 Olympic Games



Debi Thomas



Photo: nypost.com

1986 World Champ  
1st Place  
2x Nations Cup Champ  
USA  
Most technically accomplished

Katarina Witt



Photo: Canadian Olympic Committee

Previous Olympic Medal  
2nd Place  
4x World Champ  
East Germany  
Her final performance as an amateur

Elizabeth Manley



Photo: alchetron.com

Dark Horse  
3rd Place  
Contender  
Canada



An iceberg floating in a blue ocean under a blue sky with white clouds. The tip of the iceberg is above the water, and the much larger base is submerged. The water surface is slightly wavy.

*Outer Game*  
Competence

Technical Skills

Managerial Aptitude

*Inner Game*

Consciousness

who we are

decision making

values & beliefs

emotional intelligence

# Our focus today is on the inner game

When our environment is becomes more complex, it requires more of us as leaders.

Our inner game must evolve as the level of complexity of our roles evolve.

When it doesn't, our inner game begins to hold us back (or limit) our effectiveness as leaders.

# Reactive leadership mindset

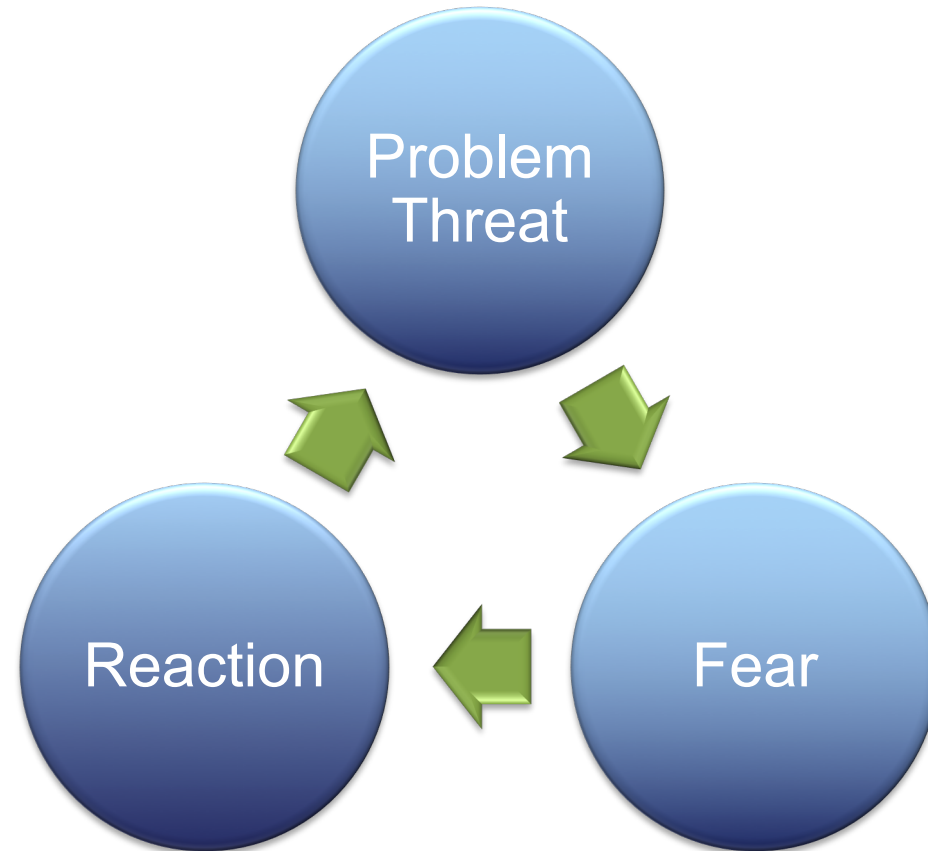
Where leadership begins.

## Focused on...

- Being liked & accepted
- Meeting expectations
- Being right
- Being valuable
- Controlling or winning

- They require outside affirmation or approval to be satisfied about these quantities?
- Based in fear
- Short-sighted

# Reactive leadership mindset at work



Source: The Leadership Circle



# Reactive leadership says...

## Complying

I want my [clients, co-workers, family, etc] to [like me, respect me, be happy] , so..

...I won't say no.

...I won't raise my rates.

...I don't set boundaries.

...I don't say the BOLD thing.

...do you like me?!?

## Protecting

I am praised for how smart I am...my intelligence is how I add value. So...

...I must prove myself to be intellectually superior.

...I will do whatever it takes to prove how smart I am.

...I may hide behind my intelligence.

...I don't have time for relationships, I'm busy being smart.

## Controlling

My job is to get results. I need to get results so...

...I will do whatever it takes to achieve my goals.

...I value results over everything.

...I will use my power & dominance to achieve my goals.

...move over.

# **This is where many leaders get stuck...**

## **Why?**

They continue to experience career progression.

They can and do get results.

They are comfortable here.

# Creative leadership mindset

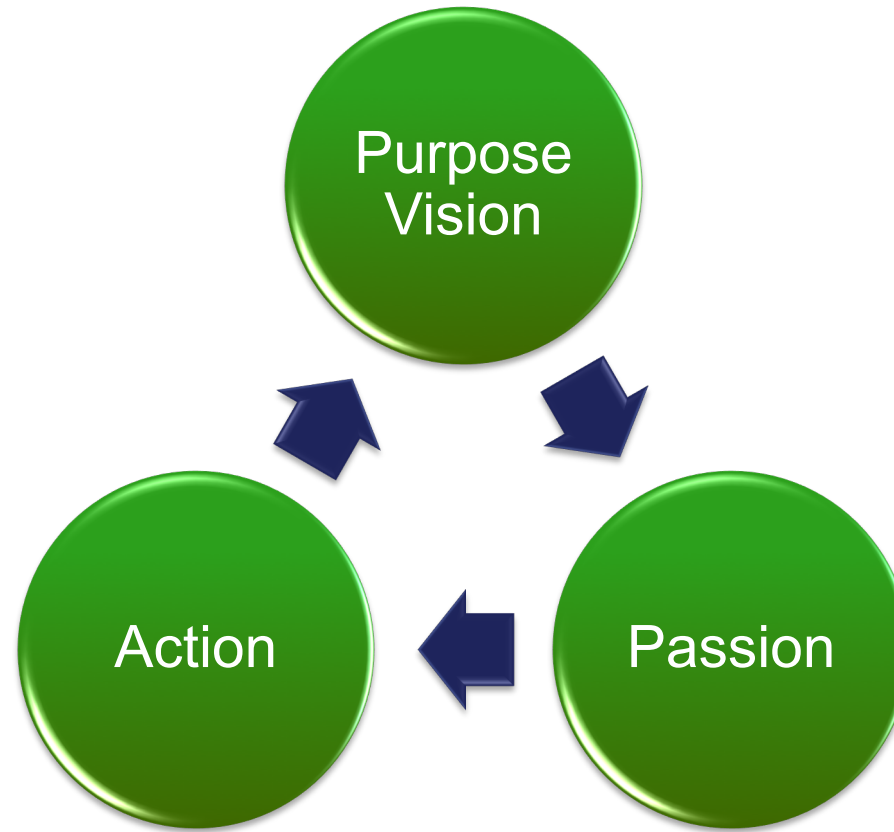
Where leadership grows independent.

## Focused on...

- Team
- Self-managing
- Acting with Integrity
- Goal Oriented, with a focus on Sustainability
- Purposeful and Visionary

- Value is held internally (no need for outside validation)
  - More fulfilling
  - Long-term focus
- What's different about these qualities?

# Creative leadership mindset at work



Source: The Leadership Circle

# Creative leadership says...

## Complying

I no longer get my value from having others' like me.

...I know that my YES means nothing if I never say NO.

...I will charge my worth.

...I set boundaries that allow me to do my best work.

...I say the BOLD thing.

## Protecting

It's OK to be seen for who I am beyond being smart.

...I am willing to admit when I am wrong or don't know something.

...I connect with my team.

...I value the big picture over my own intelligence.

...I am open.

## Controlling

I create results. I am not my results.

...I achieve results, but not at the expense of my team.

...I value my team and the impact we can make together.

...I don't have to be the only one responsible for achieving results.

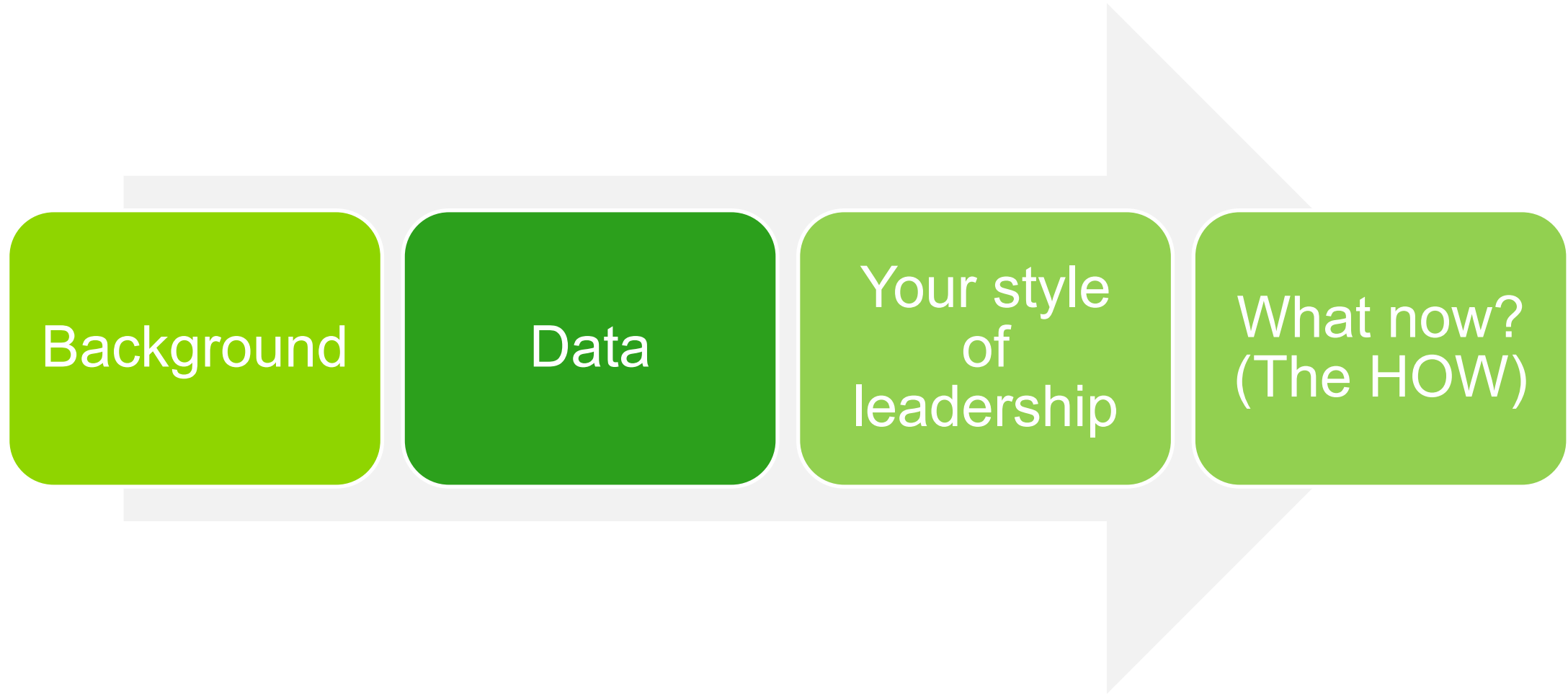
...I will use my power for good.

# Activity

**You have a pile of images at your table.**

- 1** Select an image that represents you when you are being reactive.
- 2** Find another image that represents you when you are showing up as a creative leader.
- 3** At your table, share the image you choose and how it relates to your reactive & creative leadership tendencies


# The data



# Creative vs. reactive... why it matters!

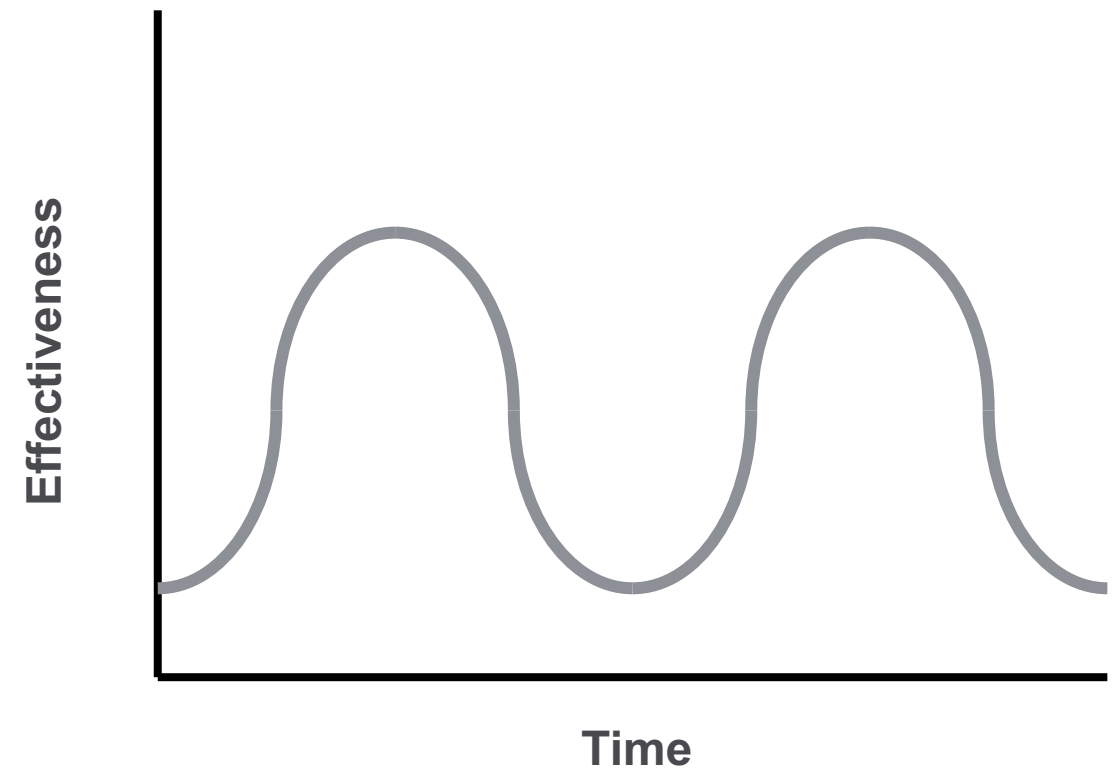
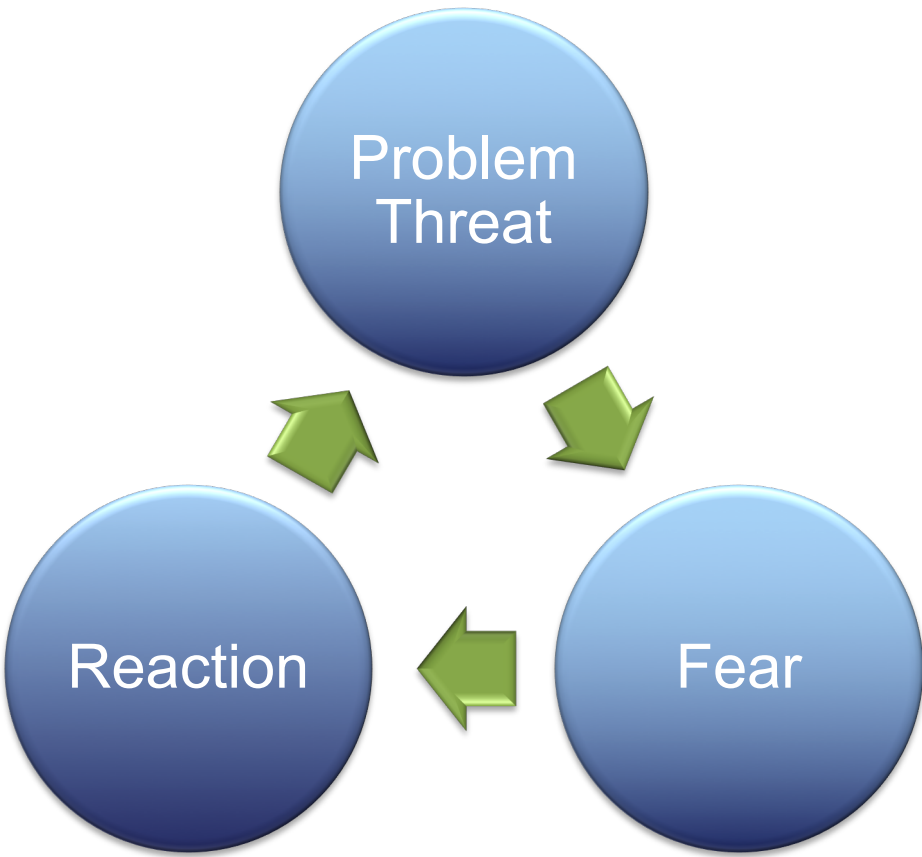




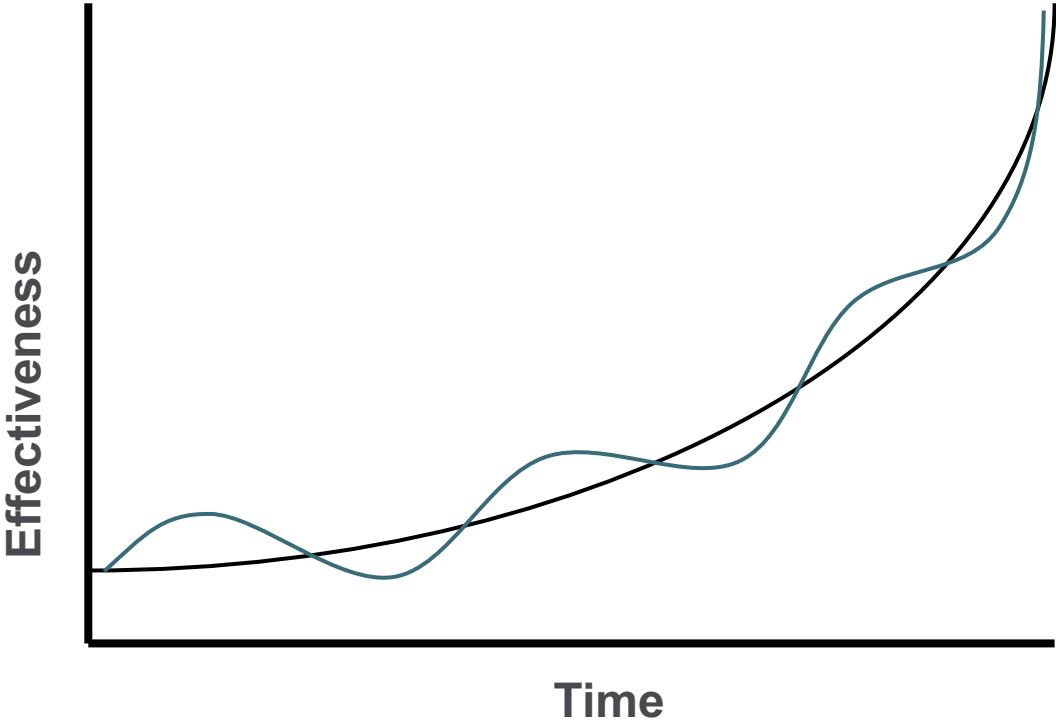
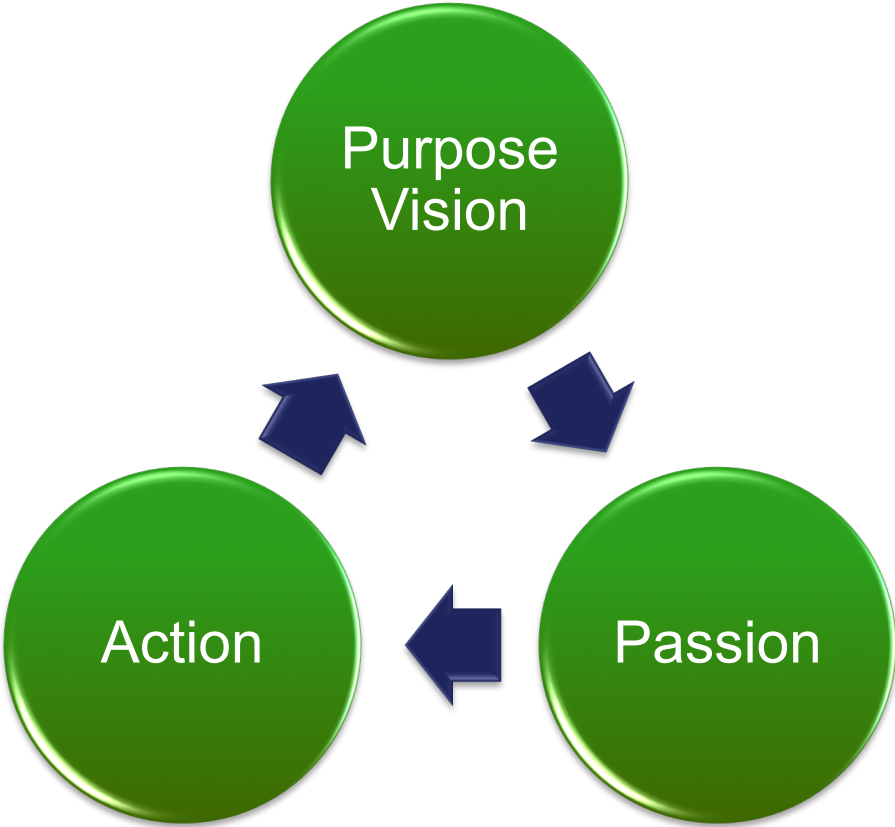


# Building a business case for creative leadership!

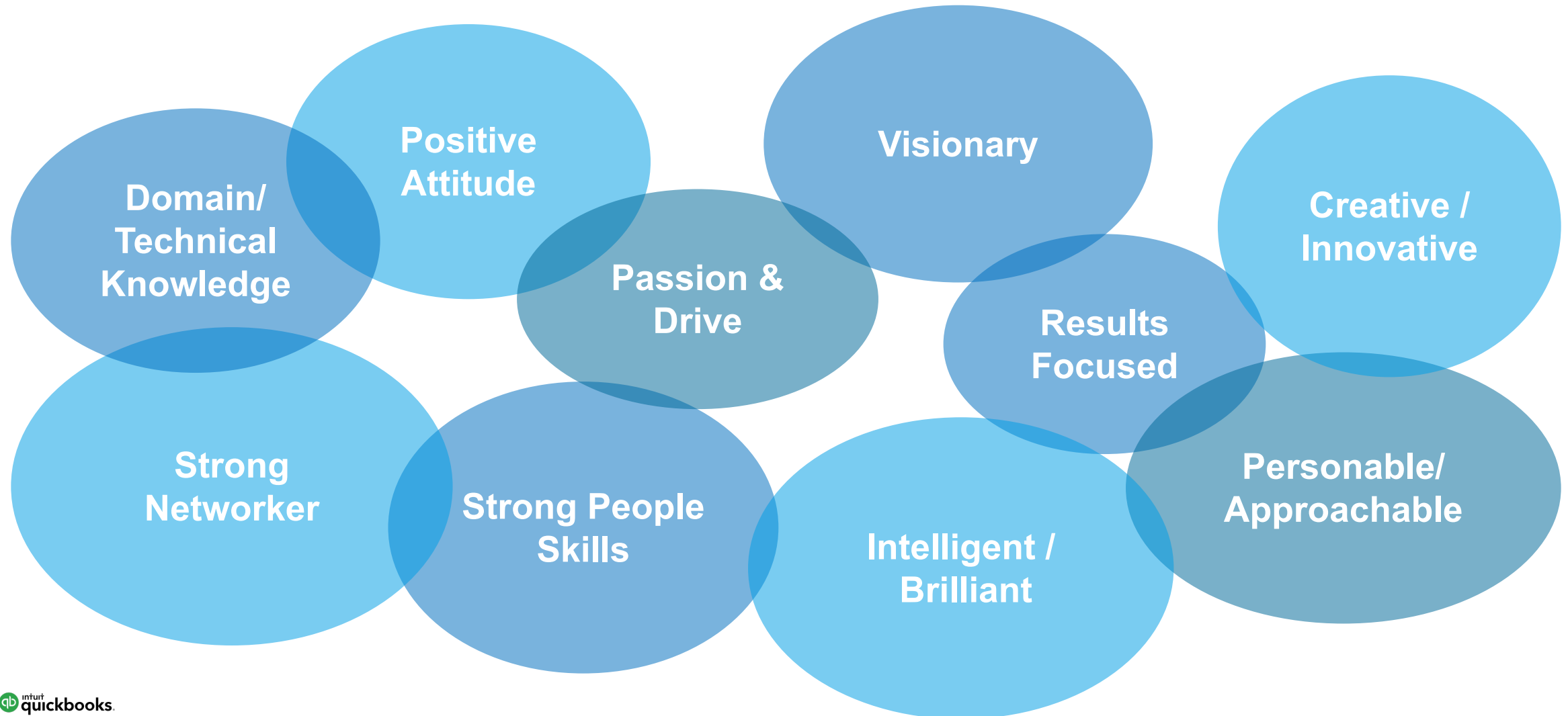
# In it's simplest form...



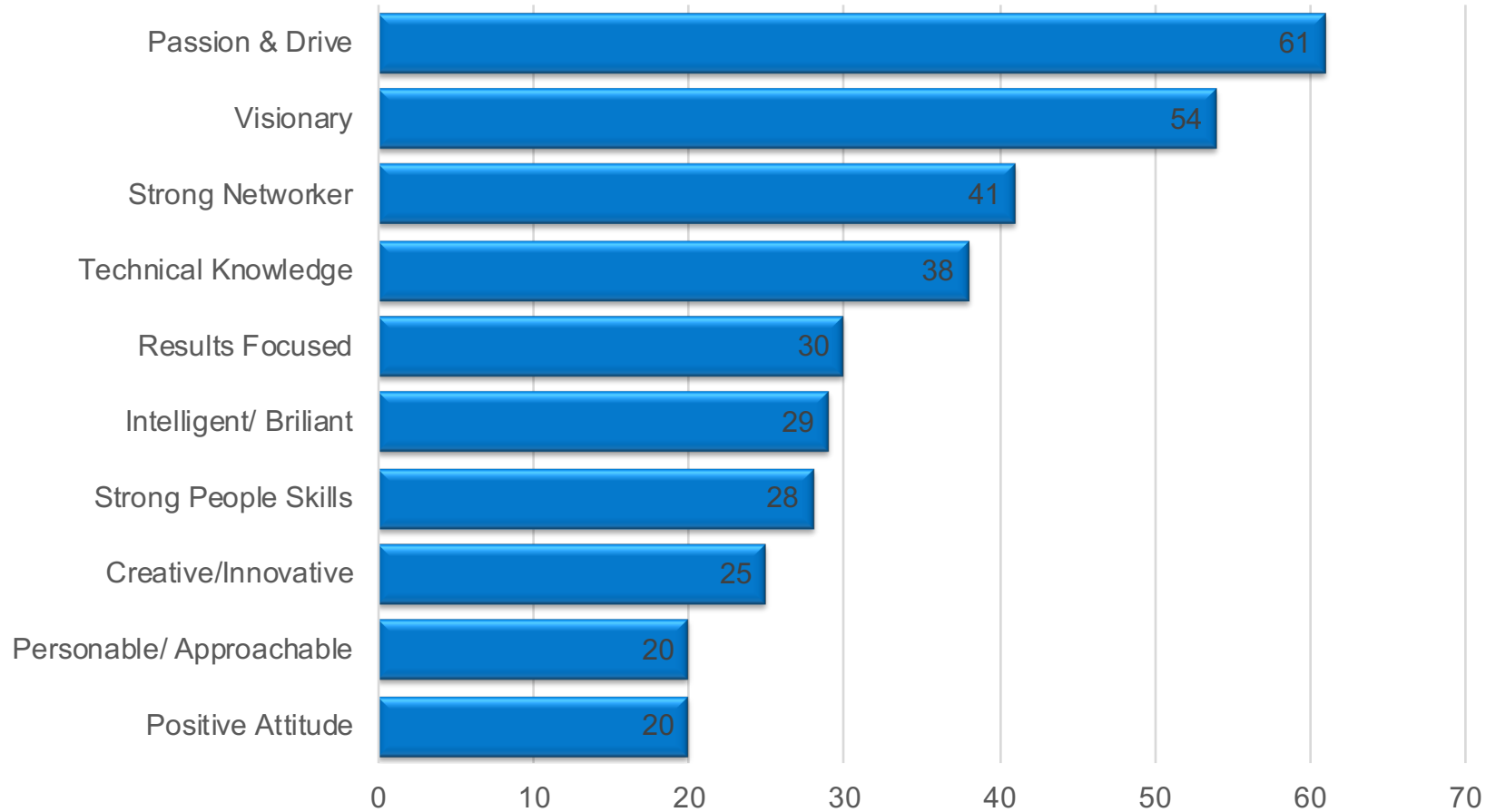
# Creative leadership results



# Top 10 most endorsed strengths of reactive leaders



# Strengths of high-reactive leaders



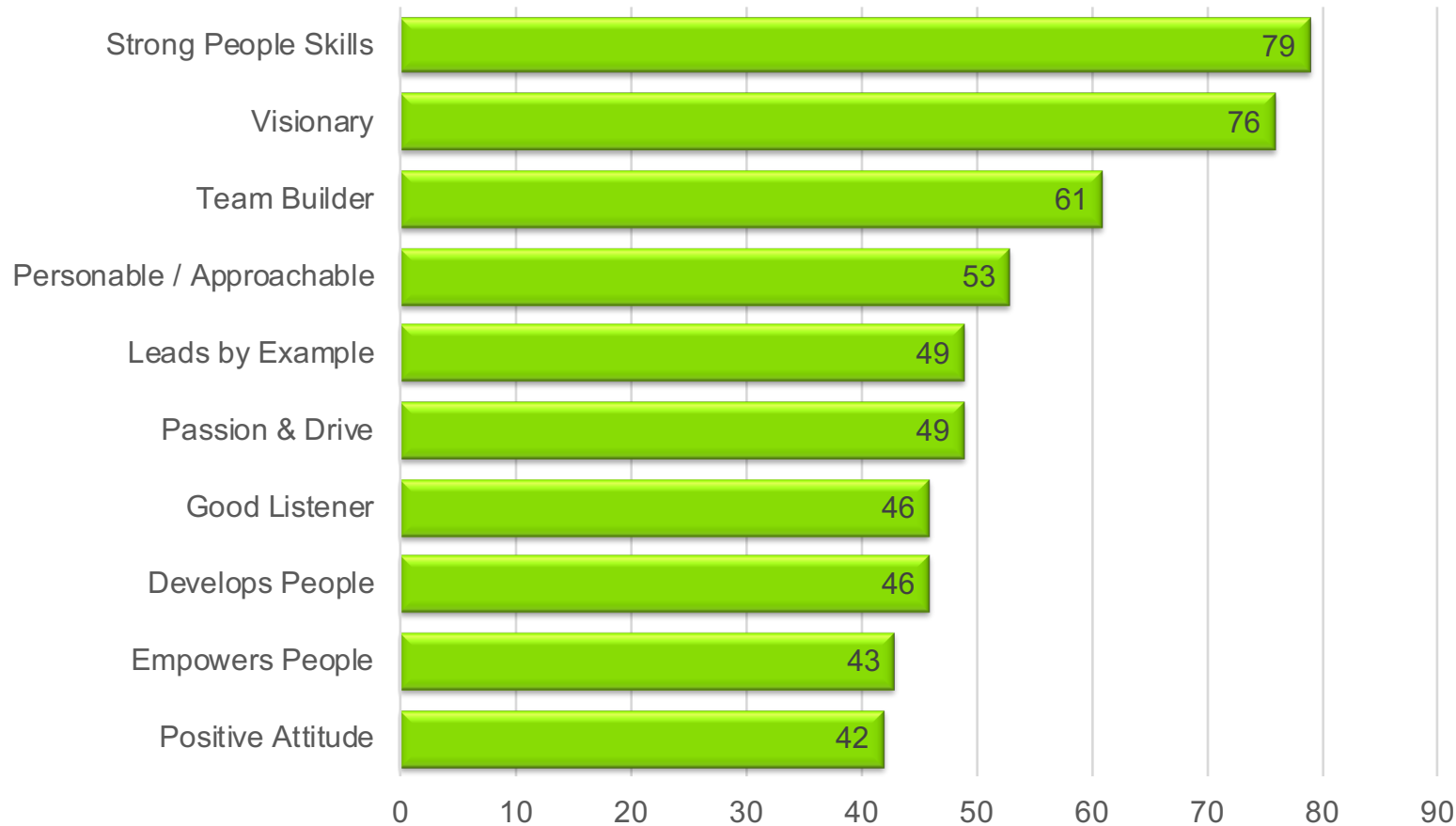
## Conclusions so far...

- These are the same 10 strengths in chart form.
- Scores range from 61 on the high end to 20 on the low end.
- Many positive qualities are represented here.

# Top 10 most endorsed strengths of creative leaders



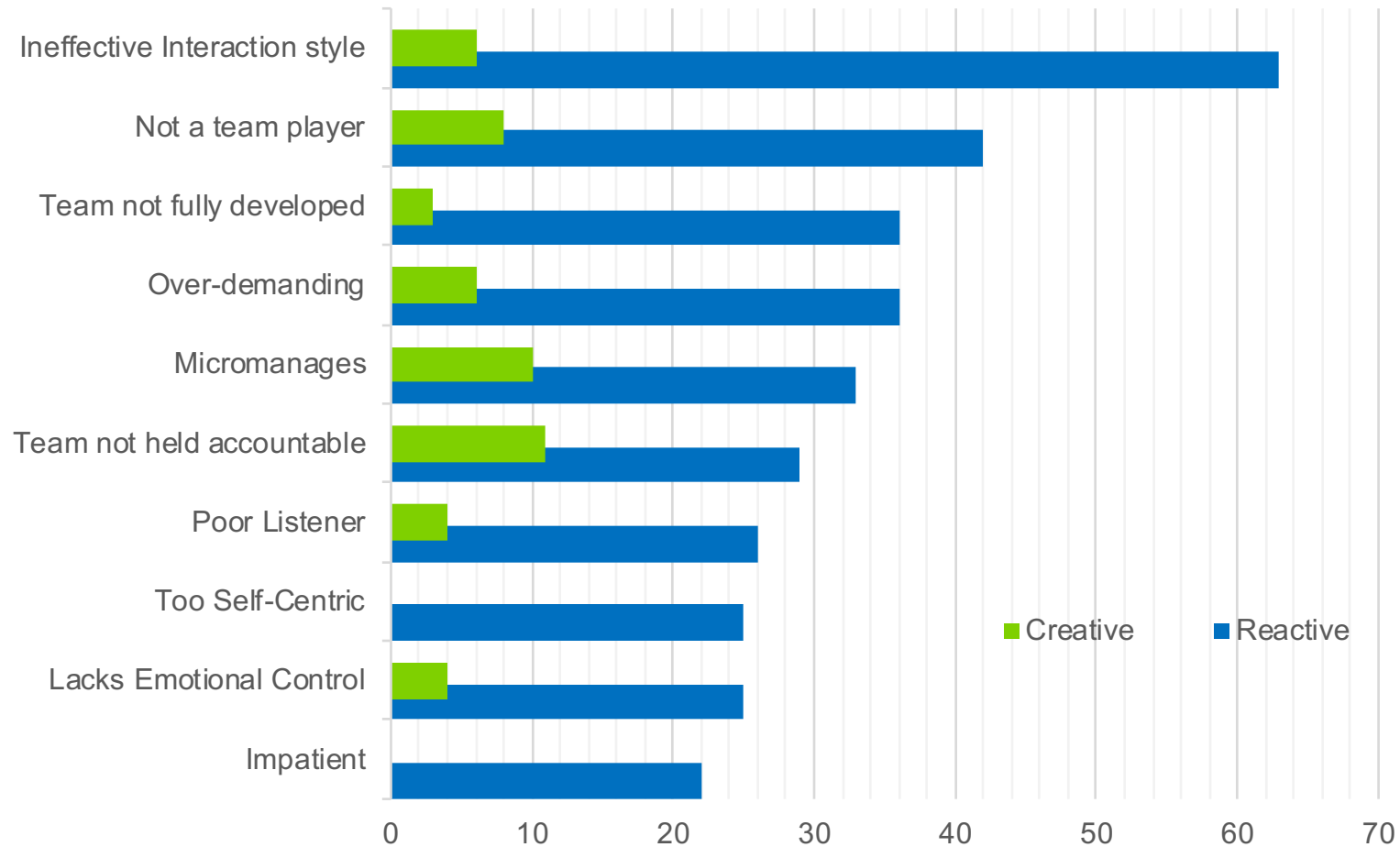
# Strengths of high creative leaders



## Conclusions so far...

- These are the same 10 strengths in chart form.
- Scores range from 79 on the high end to 42 on the low end.
- Creative leaders are more frequently endorsed for their strengths than reactive leaders.
- There are overlapping strengths; creative scores are higher in 3 of 4 cases.

# Reactive liabilities



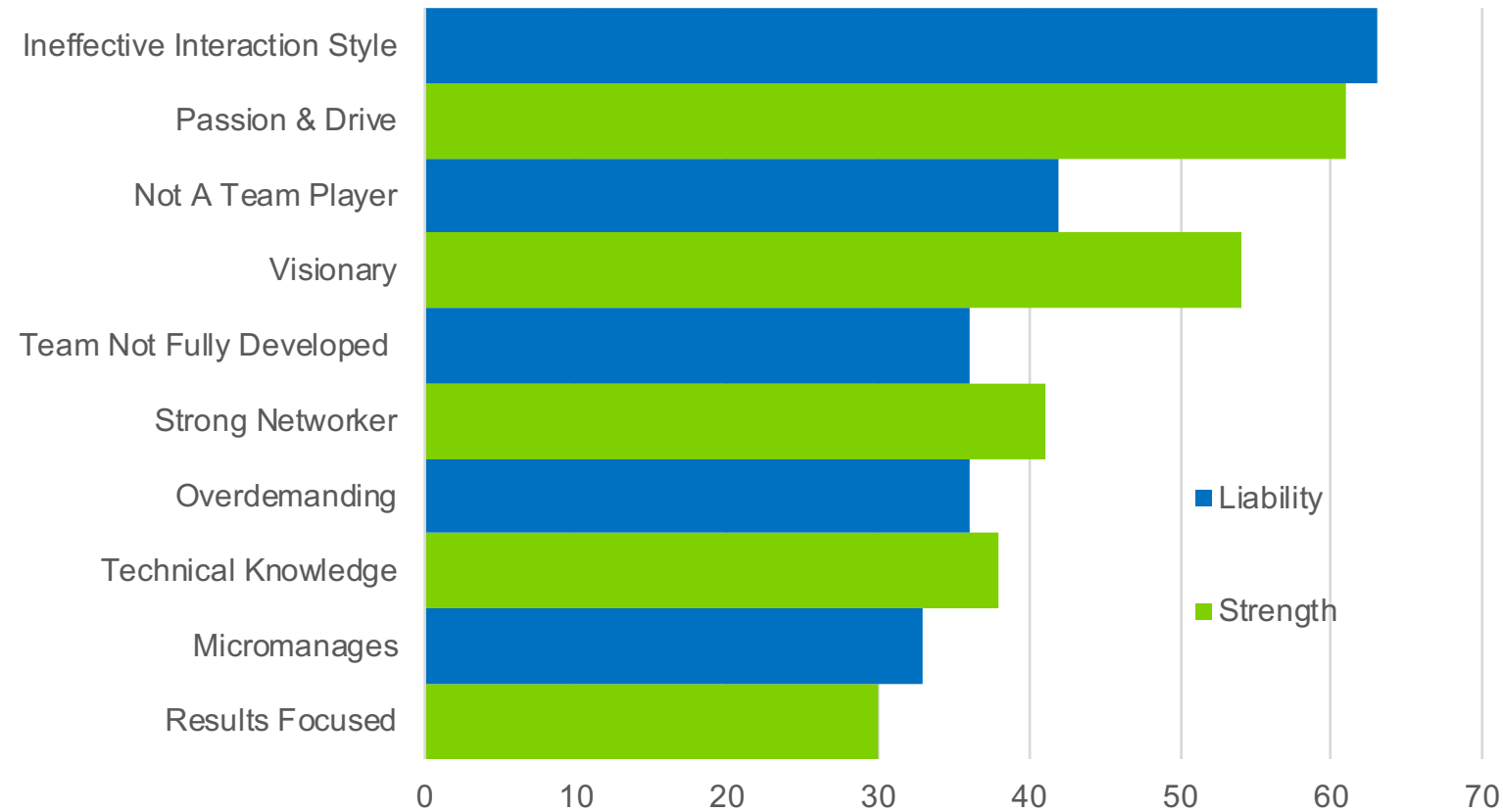
## Conclusions so far...

- In addition to our strengths, both creative and reactive leaders have “liability behaviors”
- These behaviors get in the way of our overall effectiveness.
- Liabilities are much more significant in reactive leaders than in creative.



# The cancelling effect in reactive leaders

High Reactive Strengths vs. High Reactive Liabilities

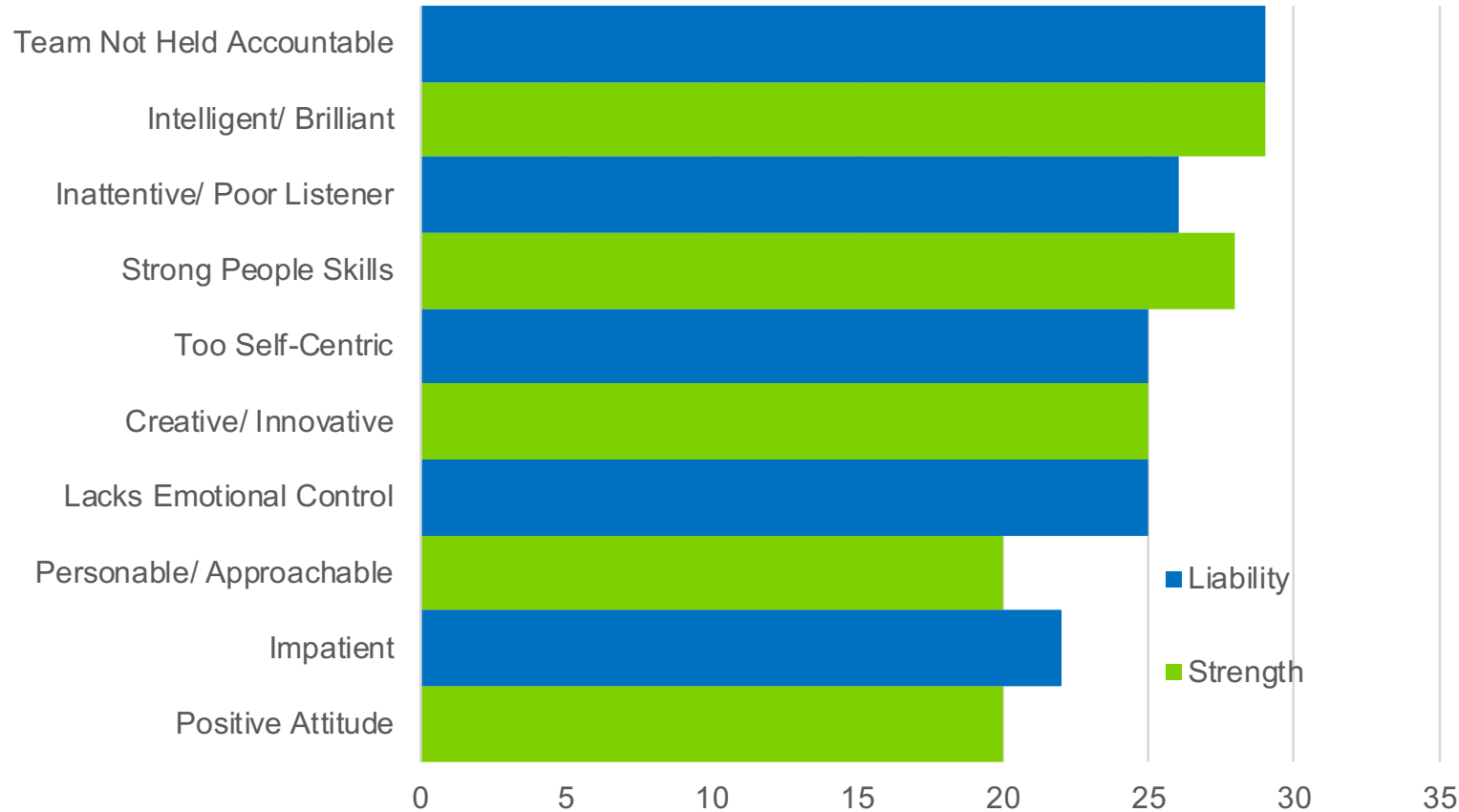


## Conclusions so far...

- Do you know leaders who get in their own way?
- These are the same Top-10 **Reactive Strengths** we looked at earlier.
- Highest reactive strengths are compared with highest reactive liabilities.

# The cancelling effect in reactive leaders, cont.

High Reactive Strengths vs. High Reactive Liabilities



## Conclusions so far...

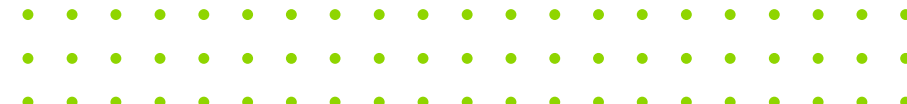
- Each strength is matched or cancelled-out by an equal liability.
- You can be great at certain things, but depending on how you do them, you may cancel out your own impact.
- Leadership is "neutral", but there is a negative impact on the ability to scale.

## Case study 1: Shari

- Needs to let other's ideas positively influence her thinking
- Superior intellect & confidence
- Valuable contributions towards firm's goals
- Something is lost in translation
- Not perceived as a leader among her peers.
- Not *WHAT* she does, but *HOW* she does it.



**The strengths that got you here  
won't get you there.**



A decorative pattern of small, dark blue dots arranged in a grid, located in the top-left corner of the slide.

# What sets the best leaders apart from the less effective leaders?

# Let's start with looking at what doesn't...

Non-Differentiating Strengths

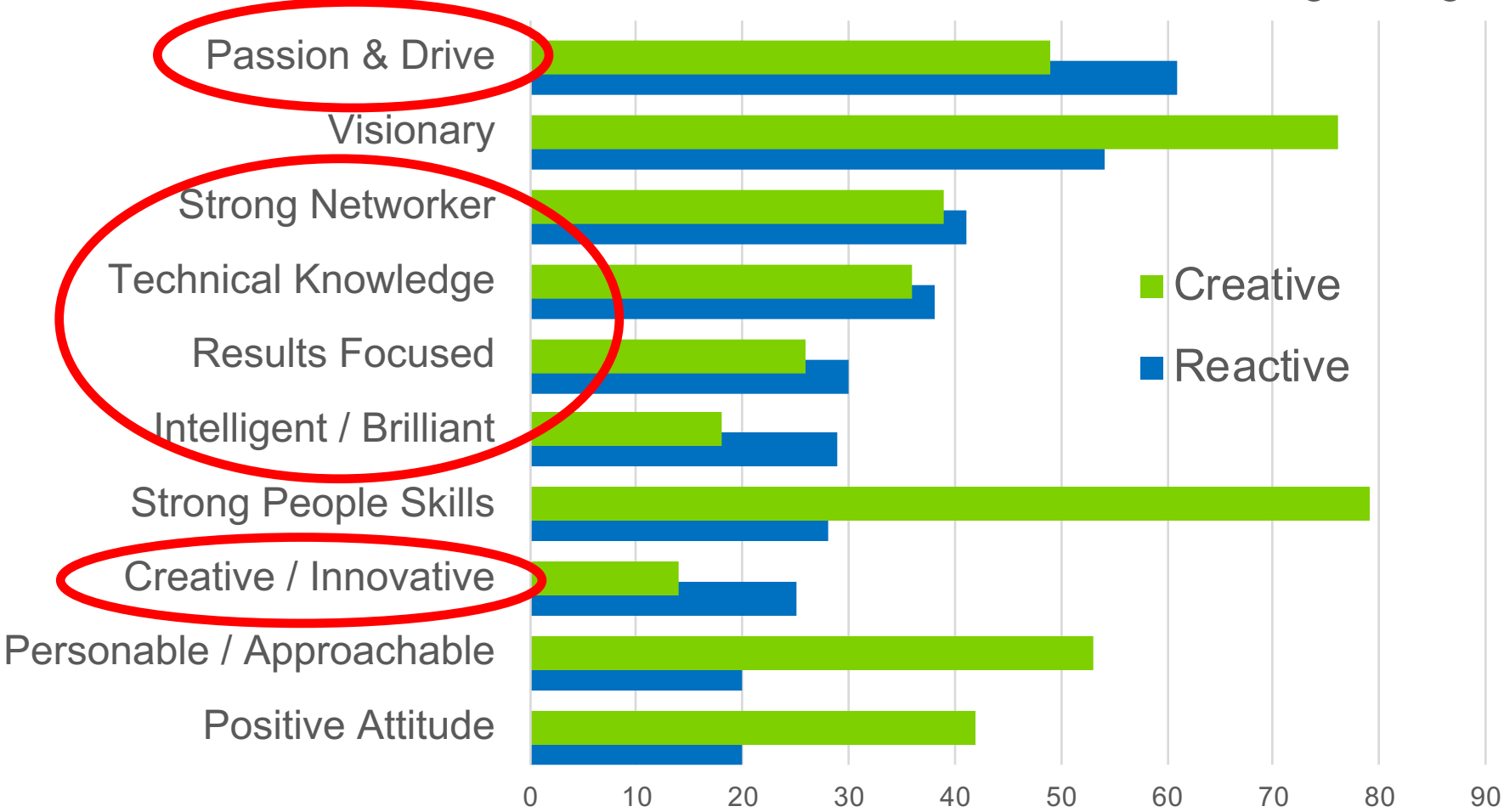
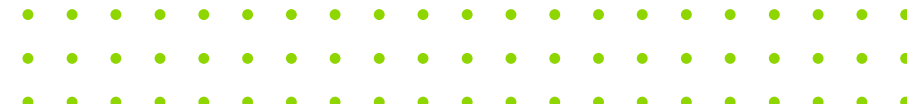


Image used with permission  
Credit: "Scaling Leadership" by Bob Anderson and William Adams



**Any overdone strength can become a liability.**



## Case study 2: Eduardo

- Extremely intelligent
- Gets to the solution quickly
- Moves too quickly; the organization is two steps behind.
- Does not leverage his team.
- Loses patience and decides to **do all the work himself.**
- Misses out on input of others; does not garner support.
- He thinks he knows best; does not inspire confidence in his team.





**If I continue doing that [pattern], I will end up working harder and longer for less and less return on all that effort.**

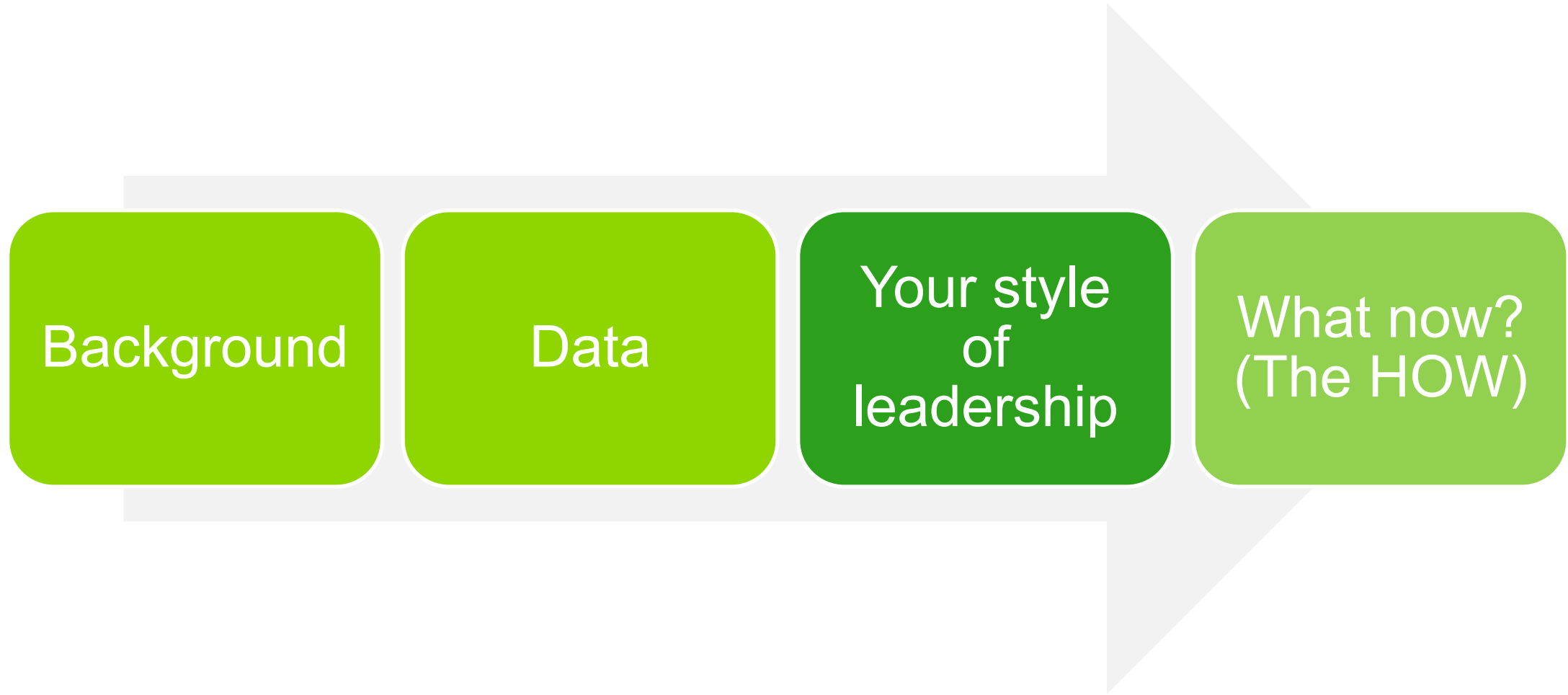


# What skills ***DO*** differentiate you?

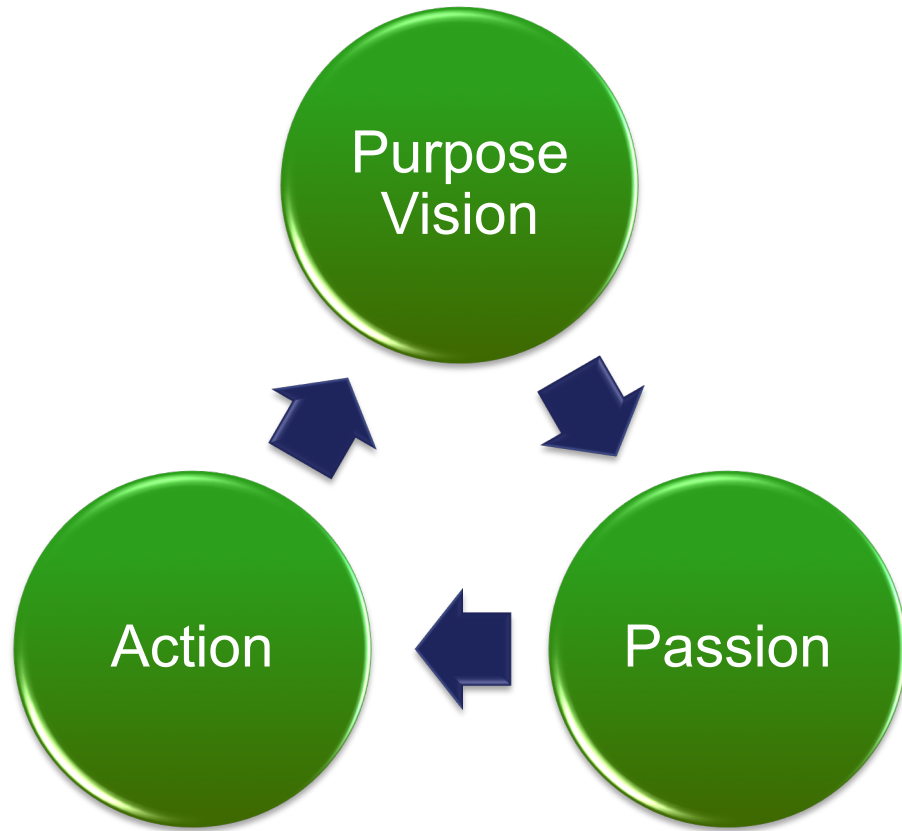
- |                         |                             |
|-------------------------|-----------------------------|
| 1. Strong people skills | 6. Personable/ approachable |
| 2. Good listener        | 7. Calm presence            |
| 3. Team builder         | 8. Empowers people          |
| 4. Leads by example     | 9. Person of integrity      |
| 5. Develops people      | 10. Visionary               |

- What do you notice?**
- Nothing on this list is about technical expertise or intelligence.
  - 8 of 10 are directly related to their people & people development skills.

# Your style of leadership



# Distilling vision & purpose



## Reflect on...

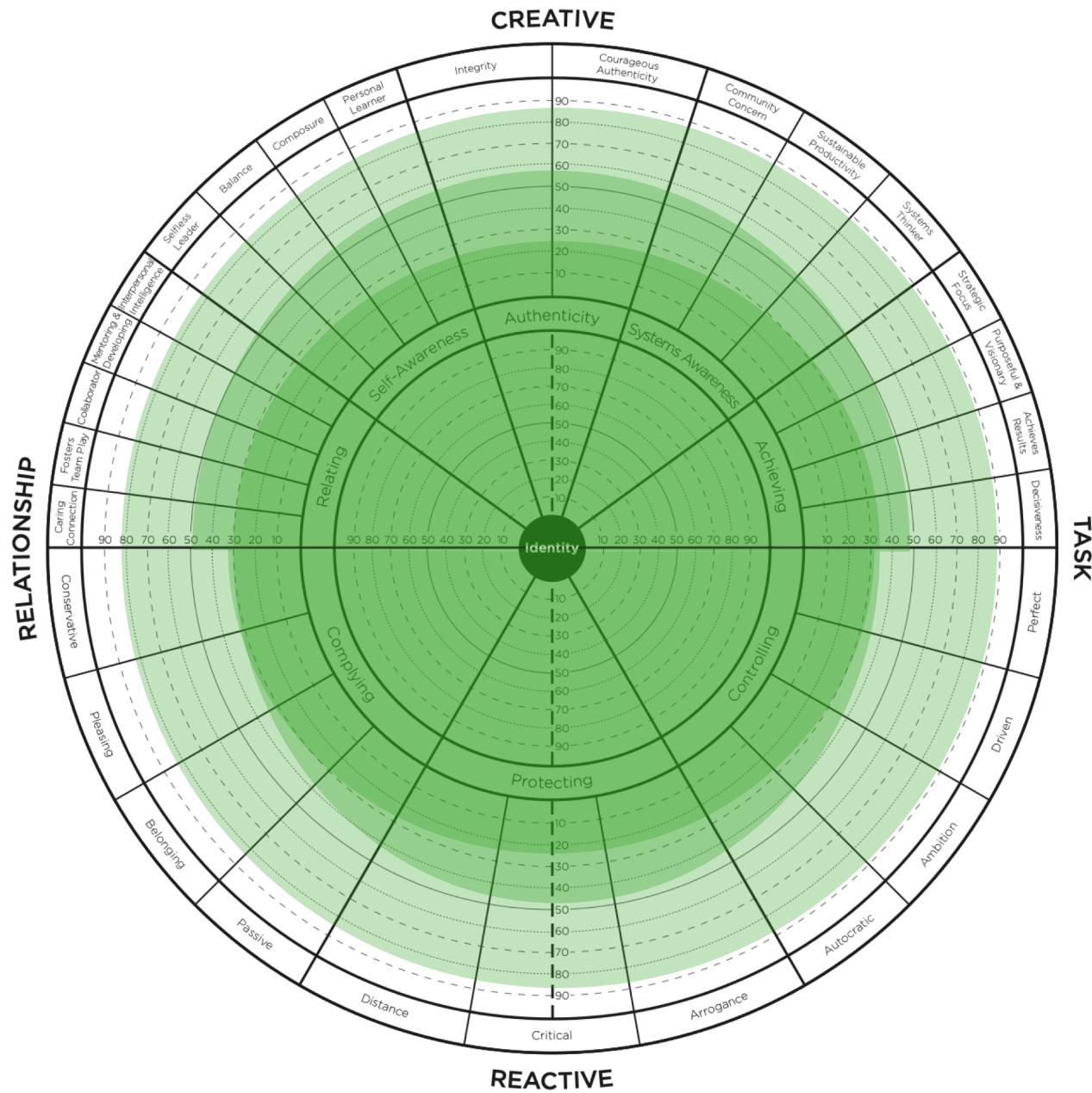
What kind of leader do you want to be?

What kind of leader do you need to be for your firm?

What do you want people to say about your leadership? About working with you?



# The leadership circle



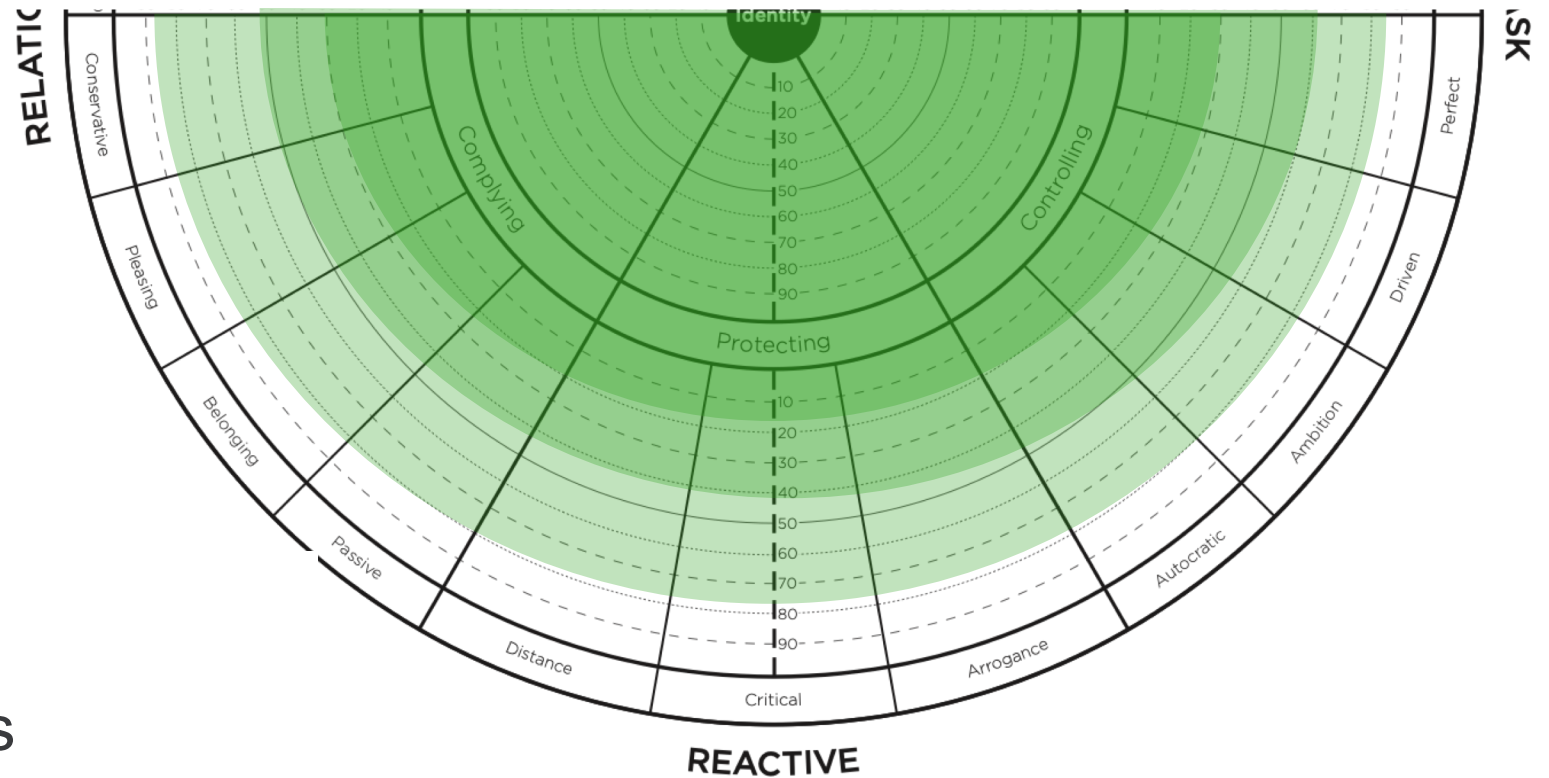


# Reduce the reactive

What one reactive behavior will you focus on lessening?  
(Complying, protecting or controlling?)

What **specifically** will you stop doing?

Think of at least 2 ways that your reactive behavior shows up for you.



# Small group sharing

What one reactive behavior will you focus on lessening?  
(Complying, protecting or controlling?)

What **specifically** will you stop doing?

Think of at least 2 ways that your reactive behavior shows up for you.



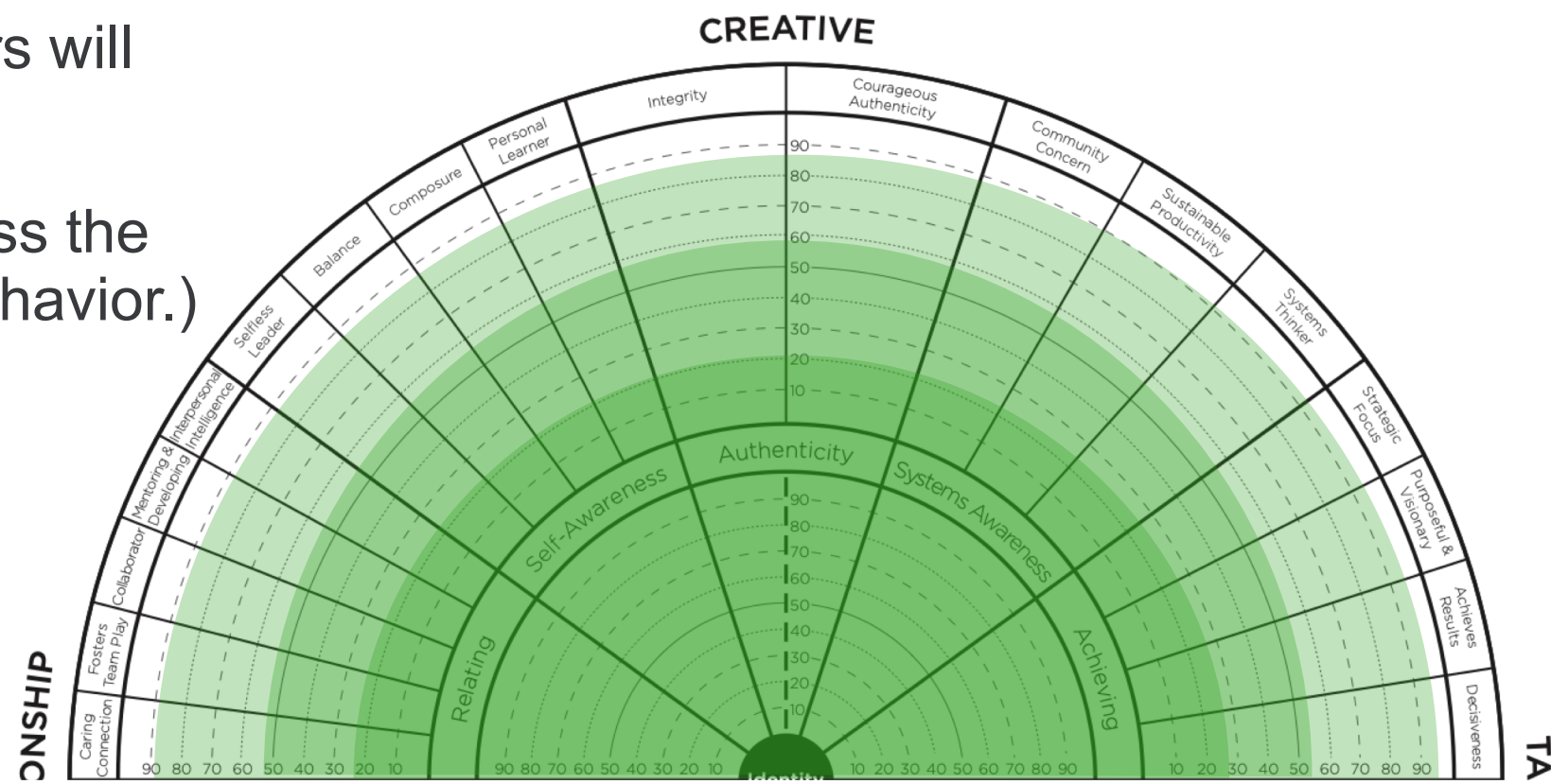


# Increase the creative

What two creative behaviors will you develop?

(For best results, look across the circle from your reactive behavior.)

What will you do more of?



# Leadership behavior that works!

Strong people skills

Visionary

Team builder

Personable/ approachable

Leads by example

Passion & drive

Good listener

Develops people

Empowers people

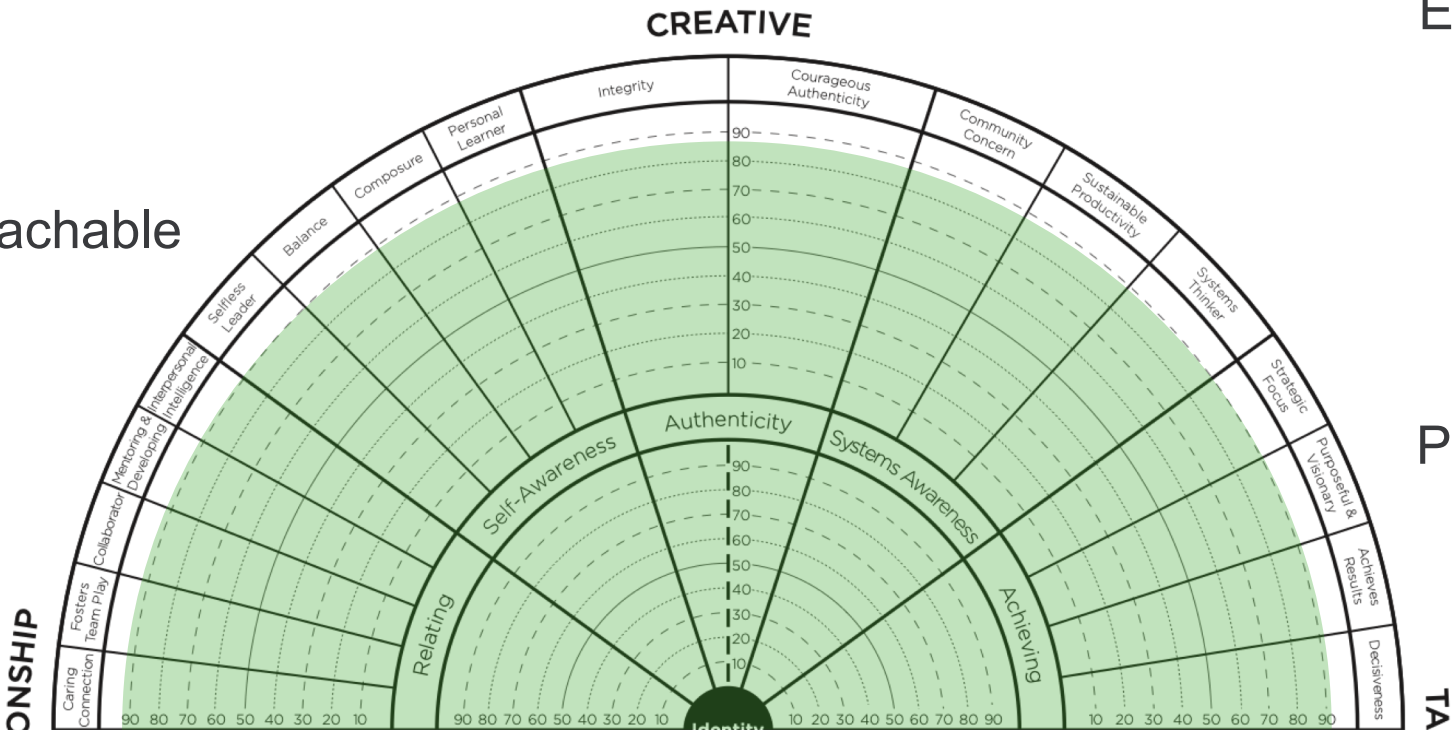
Positive attitude

Motivator

Calm presence

Person of integrity

Servant leader



**In groups of 2-3 people**

**Share your  
goals!**



# What now? (The HOW)

Background

Data

Your style  
of  
leadership

What now?  
(The HOW)



# Four steps to creating change

1. Distilling Vision & Purpose
2. Stop, Challenge, Choose
3. Building Your Personal BOD
4. Reflection & Gratitude



# 1. Distilling vision & purpose

## Short Term

What do you want people to say about your leadership?

What is it like working for you?

Who do you want to be as a leader?

Why are you here?

What impact are you meant to be making?

## Long Term

Get feedback.

What is the single most important contribution you make to your team?

What is something you should eliminate or improve upon for the good of your team?

What do your peers admire about you?



## 2. Stop, challenge, choose

Interrupting your usual patterns to unlock new behaviors!

### Stop

When you notice reactive behavior...simply stop to take a breather.

What's going on inside of you in that moment?

\*Noticing is the first step.

### Challenge

Is this behavior consistent with my desired outcomes?

### Choose

Choose to engage differently.





### 3. Your personal board of directors



#### Who should be on your board?

- People you work closely with
- People you trust
- People who will tell the truth
- People who are on your side

#### What is their role?

- Check in with you on your progress towards your goals
- Provide regular feedback
- Provide acknowledgement for your progress



## 4. Reflection & gratitude

### Morning

1. Intention & focus
2. Perspective
3. Mental alertness
4. Presence

### Evening

1. Completion
2. What worked?
3. What didn't work?
4. Bring awareness to your impact





# Questions?

**ACTION** – INTENTION = REACTION

INTENTION – **ACTION** = REGRETS

INTENTION + **ACTION** = RESULTS

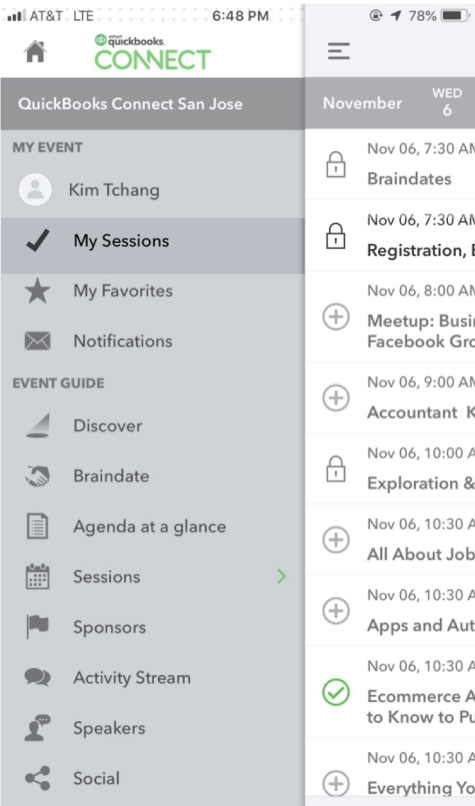
**Don't let this be you!**



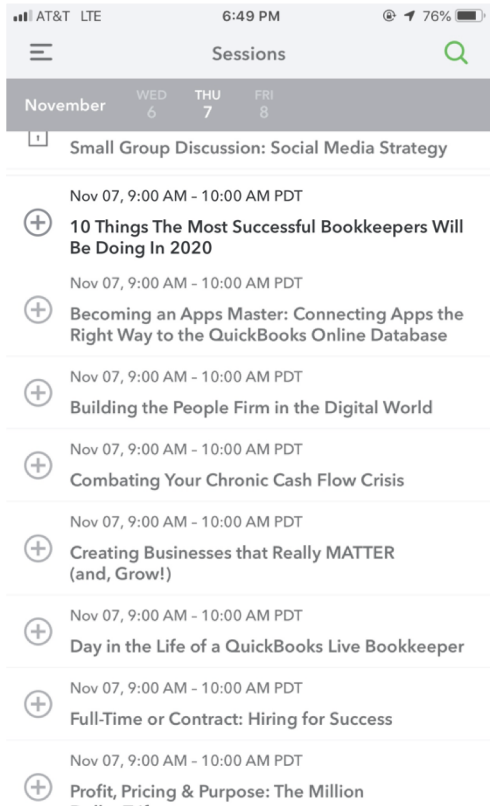
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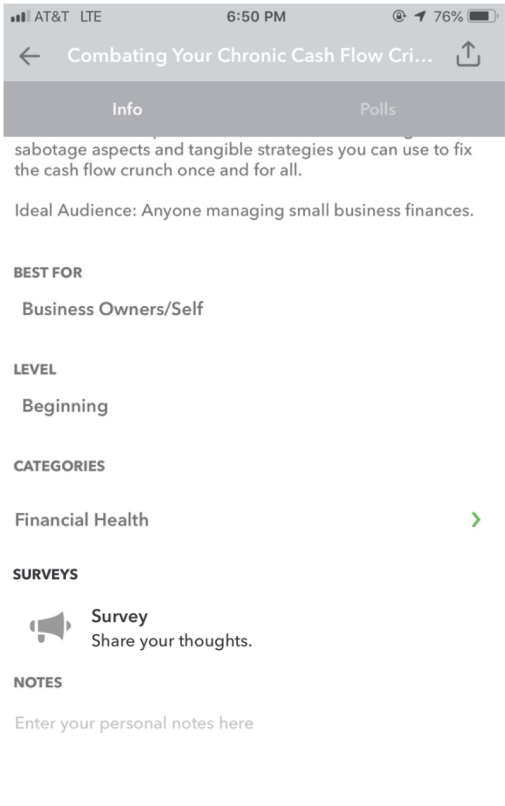
## 1. Select Sessions



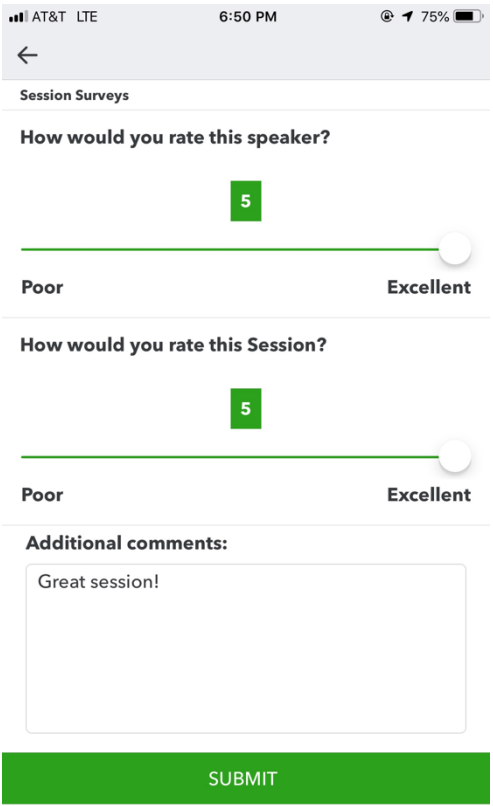
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## 3. Select Survey



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+

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+

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+

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+

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+



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