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2021 Financial Management Conference

# Building a Strong Accounting Team

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# Questions

- All participant lines are muted.
- Please use the **Raise Hand** feature if you would like to speak.
  - Raise hand feature is located in the Participant panel.
- You may also use the **Chat** feature to ask questions.
- Send a **Chat** to the Host if you have a technical issue.

# Continuing Professional Education Requirements for CPAs

- **Polls are Required for CPEs**
  - If you are seeking CPE credits, please submit ALL polls within each session, and the conference evaluations.
  - If you miss a poll, send a **Chat** message to the Host immediately.
- We use **Polls and the Zoom attendance record** to verify participation throughout the webinar.
  - **Participants must submit ALL polls and be logged in no later than 10 minutes after the scheduled session start time to receive a certificate.**

# Continuing Professional Education Credits (CPEs) for CPAs

- **Check your Zoom display name**
  - If the correct name is not shown, email your Zoom display name and your full name to [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com).
- You may **request a certificate of completion via the conference evaluations**.
  - Links to the evaluations are emailed to all registrants.
- For more information on CPE credits, contact Lindsay Wells at [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com).

# Working Directly with Your Team

- Virtual engagement – pulling the team together.
- Make people laugh and Know what's up in the lives of your direct reports.
- Connecting with team members.
- Advancement Opportunities for Team Members.
- Practice regular engagement with team members.
  - Daily meetings to check in and connect each day.
  - Weekly meetings for larger topics.
  - Monthly meeting for benchmarks.

# Polling Question 1

Who are you?

- a. CFO
- b. Controller
- c. Accounting Staff
- d. Other

# Using Technical Tools

- Design accounting processes to support the business.
- Getting around the table for system change management.
- Commitment to technology can ease processing time.
- It's okay to have disagreements.
- Engage technology process changes strategically.

# Polling Question 2

Which challenges are you working on addressing?

- a. Staying connected with staff during virtual and hybrid work
- b. Keeping workflows well organized and accountable
- c. Developing staff for advancement
- d. Retaining accountability in virtual and hybrid work
- e. Other



# Working Outside the Accounting Department.

- Controller embedded in operating team(s) meetings.
- Working with our counterparts at other organizations (Cities, Counties and other Funders)
- Work with your auditor throughout the year.

# Polling Question 3

What tactics have you used to build a strong team?

- a. Wearing your favorite hat for a meeting
- b. Utilize the first few minutes of a meeting to share non-work related stories
- c. Happy hours at the end of a day or week
- d. Send door dash certificates for chocolate and then virtually enjoy them together

List your most successful tactic in the chat

# CPE Feedback Poll

- If you are seeking CPEs, please complete this brief feedback poll.
- Note: All registrants will receive links to the conference evaluations via email.
  - Please complete the conference evaluations to request CPE credit and to provide qualitative feedback.