

Making your Next Career Move with Intention

Erin Daiber, CPA, PCC

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The Association of
Accountants and
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in Business

Webinar Features and CPE Credit

Q&A

Asking Questions



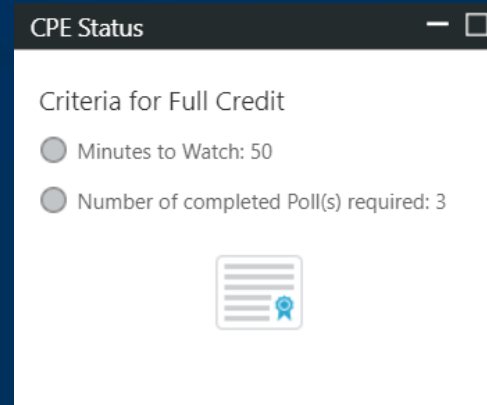
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Moderator

Terry Mormile, CPA, CAE
Director,
International Education & Career Services
IMA



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Featured Presenter

Erin Daiber, CPA, PCC
Founder
Well Balanced Accountants



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Erin Daiber's Biography

- Erin Daiber is a relatable and results-oriented CPA turned coach, speaker & trainer in the accounting profession. She is the founder of Well Balanced Accountants LLC, the creator of popular programs such as the CPA Exam Launchpad.
- Erin is known for her fresh approach to providing leadership development solutions designed specifically for your team of accountants. As a speaker, she shows accountants how to develop the skills they need to unleash the potential in themselves and others so they can have a long and fulfilling career in the field.

Learning Objectives

1. Identify exactly what you're looking for in your next job or role.
2. Objectively evaluate potential opportunities for fit and function.
3. Discover if a job is right for you by being more thorough in your evaluation process.

Poll Question 1:

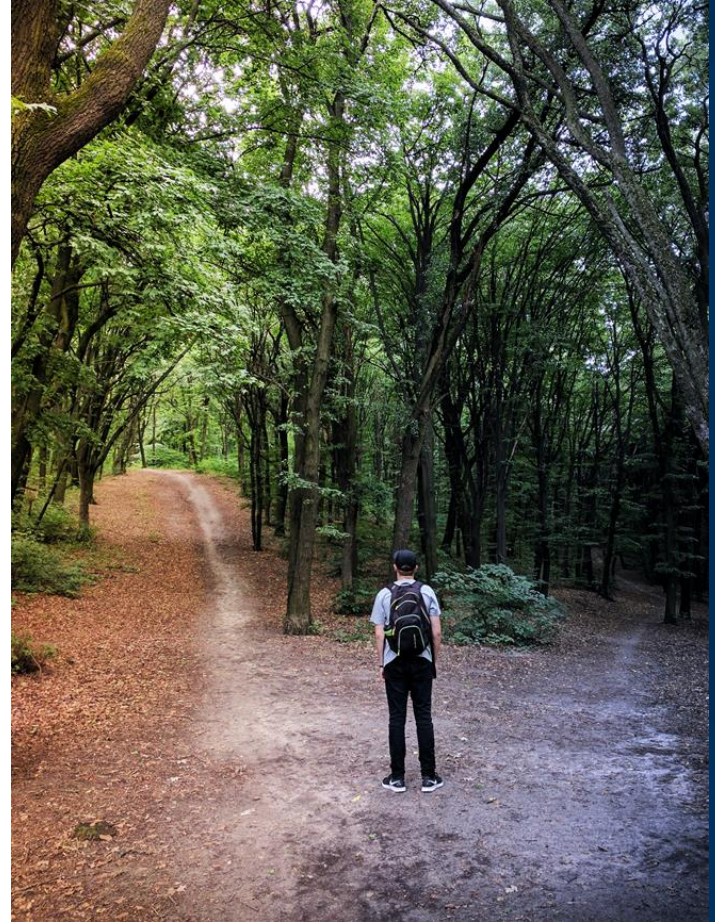
Which of the following best describes you?

- a. Happy in my job- not considering a move
- b. I would consider a job move for the right reasons
- c. Actively looking for a new role
- d. Getting ready for retirement
- e. Other

Poll Question 1 Results: (Placeholder)

Common Mistakes When Making a Job Move

- Leaving as a reaction to circumstances vs. moving with purpose.
- Rushing into a new role without proper evaluation or examination
- Looking to another role to solve your challenges without self-reflection first









What do you love
about your current
job?

What do you like
about it?

What don't you like?



Poll Question 2:

What is most important to you in considering a potential new role?

- a. Salary and Benefits
- b. Work/Life balance
- c. Title or Promotion
- d. Other

Poll Question 2 Results: (Placeholder)



Example: Buying a Home

Conditions of Satisfaction (COS)

- 
- Location
 - Size
 - Commute
 - Bedrooms/ Bathrooms
 - Neighborhood
 - Design/ Style
 - Other preferences
- In Alexandria
 - 1500 Sq. Ft. minimum
 - 3 bedrooms minimum
 - Townhouse or Single-Family Home
 - Modern or modernized with quaint details
 - Walkable neighborhood: Groceries, restaurants, coffee nearby
 - Close to public transportation
 - Max commute to work= 30 minutes
 - Outdoor space
 - Close to dog park

Conditions of Satisfaction: Your Next Role

- Location
- Company
 - (Size, Industry, Type)
- Pay & Benefits
- Team
- Culture
- Flexibility
- Growth Potential
- Experience



Step 2: Non-negotiables (Deal Breakers)

Conditions of Satisfaction

- \$150K+
- 3 weeks of vacation or Results Only Workplace
- Hybrid work environment
- Work with a supportive, communicative team
- 5 or fewer direct reports
- Commute <30 minutes from home
- Non-profit organization or organization that has a social impact commitment
- Supportive culture
- Open communication
- Coaching/ mentoring culture that promotes development
- Ability for promotion within 2-3 years
- Gain experience in Grant management/ administration
- Gain experience in financial reporting
- Gain experience with budgeting/ managing larger budget dollars.

Step 2: Non-negotiables (Deal Breakers)

Non-Negotiables

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- 3 weeks of vacation or Results Only Workplace
- Hybrid work environment
- **Work with a supportive, communicative team**
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Your Job...

- Review it daily
- Believe that you can find this job
- Imagine yourself in it!
- TRUST THE PROCESS.
- Let people know what you're looking for
- Don't Faltter.



Poll Question 3:

What is your typical pattern when it comes to evaluating new career opportunities?

- a. Rush into a role without asking enough questions
- b. Rush into a role without considering my long-term plan
- c. Carefully consider and weigh all the options
- d. I am typically resistant to making job moves (loyalty, fear, creature of habit, etc.)
- e. Other

Poll Question 3 Results: (Placeholder)

Does this job meet your C.O.S?

**You should
already have
this
information.**

- \$150K+
- 3 weeks of vacation or Results Only Workplace
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**Let's get
creative!**

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Asking Questions to Determine Fit

Culture
Team
Environment

- What does the interviewer like about their job? The culture?
- What do you look for in a team member?
- Do team members typically work independently or as a team?
- How do you foster a collaborative team?
- Does your team (this group/department) interact or collaborate with other departments?

Promotions
Career
Growth

- What has their career growth been like? Tell me more about your career path.
- What does the typical career path for someone in this role look like?

Learning
Opportunities
Company
Context

- Tell me about a typical day in this role.
- What are some of the key responsibilities for this role?
- How does this role help solve your key challenges?
- How does this role contribute to the bigger picture of the organization?

- Are there any questions from the way I answered today or my background that I can answer for you?







Poll Question 4:

Have you gained new tools and resources to use in your next job search?

- a. Absolutely!
- b. Sadly, no. I need something else.
- c. Other

Poll Question 4 Results: (Placeholder)

Let's continue the conversation!



Erin Daiber



Questions and Answers



Erin Daiber, CPA, PCC
Founder
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Terry Mormile, CPA, CAE
Director,
International Education & Career Services
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Thank You to Our Featured Presenter!

Erin Daiber, CPA, PCC
Founder
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Final Reminders

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- On your screen
- Evaluation Survey icon at the bottom of your console

► **Access to your CPE Certificate** – 2 options

- Click the “CPE” icon at the bottom of your console
or
- Click the link in your post-event e-mail

► Please print a copy of the CPE certificate for your records.

► Your CPE credit will be automatically recorded in your transcript.

Thank you!



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