



The Accidental Accountant™
Using Improvisation To Create Positive Results

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Keynote Speeches

Embrace Your Inner Superhero

Leadership demands many different skills and traits such as communication, listening, accountability, inspiration, creativity, passion, focus, and leading by example. As leaders, we must bring our superhero to work with us everyday in order to achieve our goals. What happens if your inner superhero takes a week off – or even a day? How productive and profitable are you and your team? How does this affect your personal time or family life? By using the principles of improvisational comedy, I will demonstrate how you can unleash your inner superhero on a daily basis and maintain high energy and productivity at work and at home.

Learning Objectives:

Following completion of this course, participants will be able to:

- Increase your understanding of the principles of improvisation.
- Discuss the challenges leaders face in this business global economy
- Summarize how the principles of improvisation can be applied to your life.

Recommended CPE credit: 1 - 1.5 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Improv Is No Joke: Using Improvisation to Create Positive Results

Drew Carey's television show *Whose Line Is It Anyways?* has turned improvisational comedy into a pop culture phenomenon. But Peter Margaritis knows firsthand that improv is more than just laughs—it's a valuable training tool that can make anyone a more effective business professional. It's not slapstick—improvisation is a way of life. It's going with the flow, adapting, and adjusting to the unexpected and to your audience.

As an author, speaker, educator, trainer, and the founder and self-proclaimed chief “edutainment” officer of his own company, *The Accidental Accountant*, Peter will share with you how two little words changed his life and can infinitely improve your business's success. He will also show you to really listen to your clients to build rapport, trust, and loyalty.

Learning Objectives:

Following completion of this course, participants will be able to:

- Explain the positive power of YES AND
- Distinguish between “listening to respond” and “listening to understand”
- Demonstrate how improvisation provides clarity in chaotic situations

Recommended CPE credit: 1 - 1.5 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Leveraging Leadership Through Improvisation

In today's business climate, successful leaders need the ability to communicate their vision and their ideas, along with having the ability to adapt to the changing business landscape and work within an arena of uncertainty, all the while, moving forward. Successful leaders possess these qualities: respect, trust, support, listen, focus, adapt and have a YES AND attitude.

These are the same qualities that successful improvisers possess. Successful leaders and improvisers can think-on-their-feet, process information quickly, make their teammates look good, see different perspectives, be creative and innovative, and make significant connections for the good of the team.

Learning Objectives:

Following completion of this course, participants will be able to:

- Demonstrate methods in helping to get past your inner critic
- Illustrate ways to help increase one's creativity and innovation
- Explain the positive power of YES AND
- Describe methods of managing your stress and the stress of your team
- Develop ways to increase your ability to listen to understand

Recommended CPE credit: 1 - 1.5 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Regulate Stress, Embrace Humor

Leadership demands many different skills and traits such as communication, listening, accountability, inspiration, creativity, passion, focus, and leading by example. But what happens to our leadership style when we are under stress? How productive and profitable are you and your team? How does this affect your personal time or family life? The solution is in applying the principles of improvisational comedy in order to help regulate your stress.

Learning Objectives:

Following completion of this course, participants will be able to:

- Increase your understanding of the principles of improvisational comedy.
- Discuss the challenges leaders face in this business global economy
- Summarize how the principles of improvisational comedy can be applied to your life.

Recommended CPE credit: 1 - 1.5 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Courses and Workshops

Building Stronger Teams by Using Improvisation

The popular TV show, “Who’s Line Is It Anyway” is a form of improvisation. Did you know that the core principles of improvisation are the same core principles in efficient, effective, and productive teams?

The skills needed in effective improvisation are the same skills and principles that are used in building successful teams. Improvisation is based on the principles of: trust, respect, support, adaptation, listening, and communication.

Through trust and teamwork, businesses can achieve remarkable results. The question many managers and owners are challenged with today is how to develop and foster a team environment that leads to organizational productivity and profitability. This workshop will help you and your team learn how humor and improvisation can lead to successful teams and ultimately a more productive and profitable business.

Learning Objectives

Following completion of this course, participants will be able to:

- Describe the core principles of improvisation
- Discuss the relationship between these core principles of improvisational comedy and those of effective, efficient, and productive teams.
- Demonstrate these core principles through when developing a team.
- Demonstrate how these principles, plus the concept of Yes, And, can help improve customer service and creativity.

Recommended CPE credit: 2 - 4 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Tips and Techniques on Developing New and Existing Business

In today's competitive market, business development is critical to survival. Business development can be defined as "attracting new business and retaining quality business."

This is a challenging task and one that requires knowledge, experience, patience, and a plan. Business development does not happen overnight, it is a process of developing relationships over time and having a plan in place in order to achieve your goals. The earlier that a professional understands the process of business development the more profitable to the organization they will become.

Learning Objectives:

Following completion of this course, participants will be able to:

- Discuss the company's mission statement and values
- Discuss in detail the characteristics of their industry
- Analyze their competitors strengths and weaknesses
- Analyze their social and professional network
- Development a strategic plan for the coming year

Recommended CPE credit: 2 - 8 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Communicating in the Workplace

How you communicate with your clients can make or break your career! We will discuss different client's personality styles and demonstrate the different ways to communicate information to them. See how recognizing their personality style(s) can turn communication breakdowns into breakthroughs.

Learning Objectives:

Following completion of this course, participants will be able to:

- Increase your understanding of the four main personality styles that are in today's workplace.
- Illustrate how body language can say more than words
- Discuss the differences in communicating between the generations.
- Understand it is important to know your audience.

Recommended CPE credit: 1 - 1.5 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

How to Dump SALY and Find a New Creative Approach!

Are you stuck in a rut of “Same As Last Year” and missing potential opportunities or not asking the right questions and missing potential areas of risk?

Do you wish you were more creative in your thinking so you can uncover opportunities or potential area of risk? Are you saying to yourself that “I am an accountant, I am not creative.” Well, you are incorrect. This course will demonstrate proven methods that accountants can use to unlock their creativity and innovation. You will discover new ways to break through mental barriers, SALY thinking, and roadblocks in order to improve performance, creative thinking, and innovation.

This is a lively, interactive and hands-on course that you can apply the techniques learned immediately.

Learning Objectives:

Following completion of this course, participants will be able to:

- Describe the difference between creativity and innovation
- Explain why evaluation is not part of the brainstorming process
- Demonstrate how to change your perception in the creativity process
- Apply the skills learned in Opposites, Funnel Approach, and Mind Mapping Matrix

Recommended CPE credit: 1.5 - 4 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

How to Identify, Explain, and Present Pertinent Financial Information to Non-Accountants

Do your business associates and/or clients have difficulty understanding the financials. Are they making decisions without comprehending the financial impact of their actions. They frequently “smother in detail and crave for knowledge.” This high-impact interactive program is loaded with practical ideas and techniques to help associates and clients make better business decisions. Financial Information is one of management’s most useful tools, yet far too many non-accountants are unable to read financial reports and use this information to enhance performance.

Learning Objectives:

Following completion of this course, participants will be able to:

- To help CPAs identify an organization's key financial metrics, determine the "drivers" that impact the metrics, and present the metrics and drivers to non-accountants in understandable patterns.
- To increase the CPA's confidence and effectiveness with making presentations to large and small groups.

Recommended CPE credit: 8 hours

Prerequisites: None

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Leadership From a Slightly Different Perspective

There are many different skills that an effective leader must possess, such as; integrity, vision, and a sense of humor, just to name a few. These leadership skills get transformed into one's style of leadership and those styles vary from Ronald Reagan to Bill Gates.

This course will explore leadership through a different lens by incorporating the principles of improvisational, the power of networking, the diversity of the generations. In addition, we will discuss how to conquer the fear of public speaking and ways to inspire our creativity.

Learning Objectives:

Following completion of this course, participants will be able to:

- Describe the different leadership skills, traits, and styles
- Compare the principles of improvisation comedy to effective leadership
- Discuss networking techniques that are essential for effective leadership
- Discuss how one can get past the fear of public speaking
- Describe way to inspire our creativity.

Recommended CPE credit: 1 - 4 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Tips and Techniques on Public Speaking and Presentation Skills

Jerry Seinfeld once said that at a funeral, most people would rather in be in the casket than giving the eulogy. America's greatest anxiety, public speaking, is a necessity in today's business world. Those who can speak in front of crowds and have effective presentation skills tend to move up the corporate ladder more swiftly.

This course will help you break through your fear so you can stand in front of an audience, project confidence and knowledge, all the while making a connection and capturing your audience's imagination.

Learning Objectives:

Following completion of this course, participants will be able to:

- Summarize ways to eliminate their fear of public speaking
- Describe ways to prepare for an upcoming presentation
- Describe ways to compile your information in a concise and logical manner
- Demonstrate ways to prepare an eye catching and powerful PowerPoint Presentation
- How to use strong body language when giving a presentation
- How to capture the imagination of your audience

Recommended CPE credit: 2 - 4 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

Tips and Techniques on Building a Stronger Professional Network

Networking is one of the most powerful tools accountants can develop, but it takes time, energy and commitment in order to build a strong network. Having a strong network will assist you in launching a new idea or plan, developing new business and clients, reducing costs in recruiting, and leveraging your career.

Learning Objectives:

Following completion of this course, participants will be able to:

- Summarize the five influences of catalytic individuals and recognize the various roles that they contribute in their professional network.
- Distinguish between a clique and entrepreneurial network
- Identify new opportunities in order to create an entrepreneurial network
- Analyze your professional and social networks
- Apply the tools from the workshop in order to increase and strengthen one's professional network.

Recommended CPE credit: 1 - 1.5 hours

Prerequisites: An open mind

Designed for: Practitioners, auditors, analysts, firm administrators, and finance professionals

Course Level: Basic

The 8 Hour MBA

If you don't have the time to complete an MBA degree but still want to understand the key concepts then this course is for you. As well discuss concepts that you don't see in an MBA program but are essential in the business world. These courses are designed for managers, professionals, and business owners who want to develop a broad perspective to deal more effectively in today's rapidly changing and increasingly complex business environment.

Participants will gain a high-level but thorough understanding of the key elements and components of a traditional MBA. Learn to look strategically at an organization from a holistic perspective to improve business planning and decision-making. Understand how different business processes drive results. Learn the effective use of key performance indicators to motivate, measure, evaluate, and improve results.

There are four recommended threads in The 8 Hour MBA:

- Adding Value
- Business Strategy
- Leadership Strategy 1
- Leadership Strategy 2

Or you can customize the course by selecting any six of the 30 modules listed below.

The 8-Hour MBA: Value Added

1. Better Budgeting and Forecasting

Instead of “banning the budget”, turn it into a planning process that helps your organization achieve its strategy. Learn how to use a rolling forecast to continually improve performance, respond to a changing environment, and take advantage of opportunities.

2. The Basics of Business Law

Do you know how to keep your company and your clients on the right side of the law? How can management and directors protect themselves from liability? In this session, we will cover the most common legal issues with corporate management, employee manuals, intellectual property and contracts.

3. Faster Disaster Recovery

We often think about hurricanes and tornados as disasters but have you thought about the impact of new technology, a product recall, or even fraud? Could your business survive 6 weeks without power? Learn how to identify and rank potential threats, how to develop an emergency response plan, and what to consider to get your business back to normal operations.

4. Financial Analysis

There are a number of reasons why you would conduct a financial analysis, from investment decisions to career management. This module will review the step necessary in order to conduct an effective financial analysis and spend time discussing the key components in the step of financial statement analysis.

5. Fraud

Fraud costs US companies \$400 billion annually. Do you know where the fraud is in your organization? Don't let your company continue to be a victim. This session will explain the fraud triangle, review a risk-based approach to fraud prevention, and discuss over 40 warning signs of fraud.

6. Nuances of Negotiating

When negotiating, there needs to be conversation that leads to an exchange - something gained for something given up. In this module, you will learn ways to improve your negotiating strategy and skills through new techniques that will lead to greater confidence in any negotiation situation.

The 8-Hour MBA: Business Strategy

1. Risk Assessment

An effective internal control system provides for reasonable assurance not absolute assurance. Which lead to questions like these: What could go wrong? What decisions require the most judgment? What activities are the most complex? This course will illustrate different ways to identify the impact of these risks, along with ways to help mitigate the risk.

2. Strategy

Michael Porter defines strategy as “choosing to perform activities differently than rivals do.” What are your strengths, weakness, opportunities, and threats? How are your products and services different from your competitors? This session will illustrate different methods and techniques to develop and refine your business strategy.

3. Sustainability

According to Harvard, companies with strong sustainability initiatives have 4 times the sales growth, 8 times the employee engagement, and a 47% greater increase in stock value than their non-sustainable competitors. This session will explain the 6 benefits of sustainability and 6 steps to building a sustainable business.

4. Creativity & Innovation

Are you stuck in a rut of “Same As Last Year” and missing potential opportunities or not asking the right questions and missing potential areas of risk? Do you wish you were more creative in your thinking so you can uncover opportunities or potential area of risk? This session will demonstrate proven methods that will unlock your creativity and discuss the process of innovation.

5. International Business

Business is not always business – do you understand the differences between conducting business in the US versus India or Japan? Learn about the four levels of international business and the unique challenges of each, as well as the questions you need to ask before stepping into the global business world.

6. Marketing

As a CPA, you have developed a strong technical expertise. But what about those skills necessary to grow and expand your business. This module will discuss the four P’s of marketing (product, price, place, and promotional), the importance of branding, the book “The Experience Economy” and the use of social media.

The 8-Hour MBA: Leadership Strategy 1

1. Personality Styles & Communication in the Workplace

How you communicate with your clients can make or break your career! This module will discuss different personality styles and demonstrate the different ways to communicate information to them. See how recognizing their personality style(s) can turn communication breakdowns into breakthroughs.

2. EQ is More Important Than IQ

Have you ever made a bad decision when you were angry? Emotional intelligence (EQ) has a greater impact on our decisions than our knowledge (IQ). Learn how to control your EQ and how to use EQ to make better decisions.

3. Encouraging Entrepreneurship

In order to thrive, companies need to innovate. To innovate, employees need to think like an entrepreneur. The best employees want to, and will do, more than their job description if they are provided the right environment. This session will discuss the skill set of entrepreneurs and how to encourage and develop entrepreneurial employees.

4. Dynamic Decision-Making

What is the most critical role in every job? Making good decisions! Unfortunately, too many employees have no formal process, leaving decision-making subject to too much risk. In this session, you will take an assessment to understand your decision-making style and review a six-step decision-making process.

5. Greater Governance Through Ethics

In today's fast-paced environment, we are constantly faced with ethical issues and dilemmas. It's not only what we do that matters but how we do it is just as important. With the increasing popularity of social media and internet access, ethical missteps can become an instant public relations nightmare. This module will help you learn to think about ethics from a pro-active perspective to avoid becoming tomorrow's top story.

6. Leveraging Leadership

We can all list a variety of leadership skills but how do you develop them into your own leadership style? This program will explore leadership through a different lens by evaluating your leadership style and how to capitalize on your own personal strengths.

The 8-Hour MBA: Leadership Strategy 2

1. Performance Management

Great organizations want great employees. Learn how to set employee goals that motivate, challenge, and increase their skills. This module will also discuss alternative ways to reward employees that will increase their engagement level

2. Building a Stronger Professional Network

Networking is one of the most powerful tools accountants can develop, but it takes time, energy and commitment in order to build a strong network. Having a strong network will assist you in launching a new idea or plan, developing new business and clients, reducing costs in recruiting, and leveraging your career.

3. Building High Performing Teams

The popular TV show, “Who’s Line Is It Anyway” is a form of improvisational comedy. Did you know that the core principles of improvisational comedy are the same core principles in efficient, effective, and productive teams? This interactive, high-energy workshop will introduce and reinforce these core principles into your team.

4. Positive Politics

Office politics has a negative connotation, because it refers to strategies people use to manipulate resources within the organization. In this module, you will discuss various styles and characteristics of office politics and discover ways to manage them in your favor. You may not want to participate in office politics but it is essential in your career growth.

5. Public Speaking and Presentation Skills

America's greatest anxiety, public speaking, is a necessity in today's business world. Those who can speak in front of crowds and have effective presentational skills tend to move up the corporate ladder more swiftly. Learn how to stand in front of an audience, project confidence and knowledge, all the while making a connection and capturing your audience's imagination to be powerful and persuasive.

6. Presenting Financial Information

Have you ever presented financial information to a group of non-financial people only to get the glazed-over and underwhelmed look from your audience? In this module, you will learn techniques that you can use to turn accounting language into the English language to create financial presentations with impact, comprehension, and retention.

The 8 Hour MBA: Miscellaneous Modules

1. The Art of Effective Writing

Your company is only as good as your writing. Despite all your efforts, are you still trying to explain the difference between good and bad writing? Learn 12 rules to produce effective writing with increased clarity and stronger impact

2. Enhancing the Customer Experience

We all have experienced bad customer service. However, can you define "good" customer service? To compete in today's competitive business environment you need a customer "experience." In this session, we will discuss the "experience pyramid" and review techniques for transforming service into an engaging experience that creates lifelong customers.

3. Delegation

Do you have a love/hate relationship with delegation? You know you need to delegate but the tasks never seem to get done on time or done to your satisfaction. This session will discuss the common delegation mistakes and a 6 step process for effective delegation.

4. Developing a Business Case

Improve your chances of getting to “Yes!” by learning how to present a project or idea for approval in the format of a business case. We will discuss the various components of a business case including: the executive summary, situation analysis, summary of costs vs benefits and risks vs rewards, and the implementation plan.

5. Making the Transition From Peer to Boss

Congratulations on your promotion to boss! Your hard work paid off but the real hard work is just beginning. This can be a tricky transition - you are now responsible for the productivity of your team and yet there may be some resentment because of your promotion. In this module, you will discuss different tips and techniques to help you transition into your new role with greater success.

6. Success with Social Media

Twitter, Facebook, YouTube – great fun personally but what good are they for your business? Learn about the business benefits of social media, specific uses of specific sites, and how to get started in social media in a way that fits your business.