Chris: [00:00:00] If you can't make them believe that you're actively listening and listening to understand them, you're just going to get what they think you want to hear. And that is the most deadly thing that you can have in a leadership role -- a bunch of people telling you what they think you want to hear.

[music]

Peter: [00:00:26] Welcome to improv is no joke podcast, where it's all about becoming a more effective communicator by embracing the principles of improvisation. I'm your host Peter Margarita's the self-proclaimed chief edutainment officer of my business the accidental account. My goal is to provide you with thought provoking interviews with business leaders so you can become an effective improviser which will lead to building stronger relationships with clients customers colleagues and even your family. So let's start to show. Welcome to episode 61, and today my guest is Chris Jenkins, who is the CEO of the South Carolina Association of CPAs. Prior to joining the South Carolina Association of CPAs, Chris served as the chief information officer at the Ohio society of CPAs. During his 17 years with the Ohio society, he created strategies to best leverage emerging technology trends and solutions to benefit the organization. Chris also served as vice president of Copy Sense, a technology consulting and training firm that created, planned, and implemented small business technology solutions. Chris is a magna cum laude graduate of Devry University and is a certified information systems security professional, a Cisco Certified network administrator, and a Microsoft Certified Systems Engineer. Chris has been published in numerous professional and trade publications and has spoken on the topic of Technology and Management at more than 30 events nationwide. So before we get to the interview, I'd like to talk about Listen, Learn, and Earn. I have partnered with the Maryland Association of CPAs and the Business Learning Institute to bring an exciting new learning opportunity for accounting professionals to earn CPE credits. You can earn up to one CPE credit for each completed podcast episode purchased for only $29 through the American Association of CPAs and the Business Learning Institute self-study website. The podcast episodes are mobile friendly. Open your browser on your smartphone, tablet, or computer, Go to the MACPA and BLI self-study account, and listen to an episode. Take the review and final exam while you're working out or after listening to an episode on your commute to and from work - It's that easy! While all Improv is no Joke podcasts are available on my website, only those purchased through the MACPA and BLI self-study Web site are eligible for CPE credit. You can get detailed instructions by visiting my website at www.PeterMargaritis.com and clicking on the graphic "Improv is no Joke for CPE credit" on my home page. OK now let's get to the interview with Chris Jenkins.

[music]

Peter: [00:03:27] Chris welcome to the podcast. I greatly appreciate you taking time out of your extremely busy schedule to spend little time with me this morning.

Chris: [00:03:36] Well I appreciate being here and I thank you for having me. It's going to be a fun time. I've got a feeling.

Peter: [00:03:41] I'm going to say I'm going to guarantee that because we've had some great conversations. Actually we just saw each other at AICPA interchange in Miami. And part of the conversation we're going to have today... we're going to revisit the conversation that we were having down in Miami, but before we get into that: Tell the audience a little bit about who Chris Jenkins is so they get an idea about you.

Chris: [00:04:03] So I guess the most important thing about me is I have five children. I have two grandchildren, so I have a very large family and I started very early in my life so I had to work really hard in order for all of them to eat. Because when they don't eat, they get cranky.

Peter: [00:04:21] Hahaha!

Chris: [00:04:21] So I graduated high school. I had my first child right out of high school. Started college. Wanted to be a financial planner. I mean that was that was my goal in life. I needed a computer and I couldn't afford a computer because I was buying formula instead of technology at that point. So I went and I bought a box of parts, and out of that box of parts I managed to build five computers. And I kept one of them for school and the other four I sold for a thousand dollars a piece, and my financial plan changed dramatically at that point.

Peter: [00:04:53] Yeah.

Chris: [00:04:55] So it was you know you're going to leave college and I started a small hardware company and I was building machines and selling them to CPAs and attorneys, and then Dell and Compact and HP started really hitting the market and I said you know this is not a sustainable business plan. I'm never going to compete with these guys with these homegrown machines. So I changed my business model into networking and consulting and some training because I didn't have to have a lot of inventory. It was all knowledge based. And again my my clients were attorneys and CPAs, and I at this point had had another child and I had a third one that was on the way. And I was doing well in the business, but during tax season it was amazing. I was getting calls at 2:30 in the morning because the mouse didn't work. This didn't work. That didn't work. And between you know waking my children up and having a very angry wife, I decided it would be beneficial if I gave this up and got a real job with benefits. And at that point I went to work for the Ohio society of CPAs as a network administrator, and I had a great boss. In fact, I had several great bosses who taught me a lot about life and a lot about my job and they helped me grow. And they walked me through some of my personality abnormalities, if you will. And I stayed there for about 18 years and I really enjoyed my time and it was a great place to work. And then finally I went back to school and decided to get a business degree, and with that business degree I thought you know... I'm kind of disillusioned with technology at this point. I don't like the direction that it's going. I'm going to try something different. And I took over about two-and-a-half years ago as the CEO of the South Carolina Association of CPAs. So my entire adult life pretty much I've been working in associations.

Peter: [00:06:50] Wow that's a great story. I didn't realize you're a grandfather. I mean you look like... I know that I'm older than you and I've got like a 17 year old, so that just that just blows me away that you're a grandfather. But I didn't realize that I could have, instead of sitting here on my Mac, I could be here on my Jenkins, if you kept building computers and turned them into a multibillion dollar business.

Chris: [00:07:17] Yeah but I didn't have the style that the Jobs had. I try to emulate it now. You know I've got the mock turtleneck and the jeans and I do that quite often.

Peter: [00:07:25] I did see you wear the mock turtleneck and jeans when you did the gizmos and gadget presentation down in Miami.

Chris: [00:07:32] Yeah.

Peter: [00:07:33] That was a good luck.

Chris: [00:07:35] I try, you know.

Peter: [00:07:37] One of my favorite stories about you because we've known each other for a long time is... I was attending the conference, and you were on a panel discussion and I'm in the audience and I knew you from the I.T. perspective at the Ohio society, but I'd never seen you speak to a group. And I don't remember what the question was, but I remember three people answered it and they were sitting down. And then it was your turn and you just grabbed the mic and you said "I can't sit down." You just stood up. You came out from behind the table and you gave your answer and you took over that room, and you absolutely blew me away on your presence, your style, the ability to command that audience, the ability to take over that room. And I went... is that Chris? is that our Chris? and you just just completely blew away -- Where did you learn that? How did you pick that up.

Chris: [00:08:35] So I'll tell you a couple of my speaking stories and how that progressed over time. My first professional presentation I still remember it because people called for me to be fired afterwards.

Peter: [00:08:48] Hahaha!

Chris: [00:08:48] It was at an OSAE event, which is the Ohio society of association executives. And I was to come in with a few of the higher ranking members of the Ohio society -- Clarke Price, Jim Hartley, Laura Hay, and myself did a presentation on the future of technology and how it's going to impact associations. And that was about a year into my career at this point. So I went in front of all these Association professionals and I was explaining the progression of technology and how operating systems were being designed to be self-healing, and eventually I.T. professionals were going to have to adjust what they did because there would be no need to fix machines. And we went through the entire presentation. There was somebody in the audience that asked the question "well when all of this happens, what are you going to do?" And I looked at them I said well I guess I'll just transition into management. It doesn't appear that you guys do anything.

Peter: [00:09:45] Hahahahaha!

Chris: [00:09:47] Needless to say, it didn't go over well with the crowd. But you know, with my coworkers, they thought it was incredibly funny. But one of the things that Clarke and the senior staff at the Ohio society wanted is they wanted their staff to be able to go out and share information, and Clark was really big about giving back to the community. So he took all of his managers and he invested in speaker training for us. And the speaker training was with Rob Sherman.

Peter: [00:10:16] Oh yeah I remember Rob.

Chris: [00:10:17] So we had a group session where we all did presentations. It was very uncomfortable. And then we had people that got one on one coaching, and I was one of those people selected for a one on one coaching and I'll never forget it. I walk in with Rob and we're having our personal session. I do my spiel. I do it exactly how I would do it, that I'm comfortable doing, and he looks at me and he goes everything you're doing is wrong.

Peter: [00:10:41] Hahaha!

Chris: [00:10:41] And he goes if you look at my book, everything you're doing is wrong. And you know that was that was a little hurtful to me. I was I was a little upset because I felt very comfortable in how I was presenting. But then he followed it up and he goes but it works for you. I wouldn't change anything about how you do it. It's not how we train people to do it. But you're so naturally comfortable in your style... Just keep doing it. You connect with the audience. And I said well that's great. I guess you know that's wonderful, but we paid for the session and I want to make sure I get my money's worth. So here's my problem. And I told Rob I was like Rob, I can't engage with people one on one. If you put me in front of 100 people or a thousand people on a stage, I'm perfectly comfortable.

Peter: [00:11:28] Mhm.

Chris: [00:11:28] But when I have to go to a networking event and I'm at a table, I'm very uncomfortable. Or if I have to go up and greet someone, I'm uncomfortable. I don't know how to end the conversation. And he told me he says well it's because you're pompous and you're arrogant, and quite frankly you're an ass. And I said Well I appreciate your observation. And he goes you just don't really care what other people think or what they're talking about. You want to talk about what you talk about, and I said that was probably you know why I didn't date much... because I'm a little self-absorbed. He goes Well here's how we're going to get rid of that. And I remember we went very tall building. He goes for the next hour, you're going to ride the elevator up and down, and everyone who gets on you're going to greet and you're going to talk to you and you're going to find out what they do.

Peter: [00:12:16] Really?

Chris: [00:12:17] And I did. And first off I'll tell you don't write an elevator for an hour. You get incredibly motion sick. But when you're in an elevator and you're in that contained space and you catch people off guard by looking at them saying "Hi my name is Chris and I'm interested in what you do. How's your day going? What is it that you do for a living?" People are shocked, and you very quickly get over that fear of engaging people. The other thing that I learned from that is how to stop a conversation because you had to do the conversation, and then end it properly before they got off the elevator. So I learned how to network and manage a room by being locked in an elevator, and then you know over time, as you do this more often, you learn there are little tricks that work for you. Some people need to rehearse for hours and go through their slides. I find that if I I rehearse, I'm not nearly as good. I want to speak from the fly. I want to speak from the heart. And most importantly I want to give something to the audience that they're going to remember. So I do. I walk out. I shake hands. I'll pick on you know I'll try to pick people out of the audience that I can pick with a little bit. Sometimes people pick with me, and the majority of times it's worked. There have been times where I've misread someone, and it hasn't gone you know as well as I might have expected or hoped. But overall it just works for me, and I think when you're doing things like this you're expected to leave people with a sense of knowledge, excitement, and engagement, and if you want to sit down or stand behind a podium and hide, or if you are creating activities that are making your audience work with no real benefit to them, don't do the job. Just don't do it because, quite frankly, you're there to make sure that audience has a great experience and you've got to do that. And if you go in understanding that, they're all empathetic. None of them want to be standing where you're standing. What they really want is to not be bored to tears for the next hour and just do the job. The fear melts away and you can just get it done.

Peter: [00:14:34] Well that's great advice. I love the elevator story, actually, and I'm going to share that story with a friend of mine. She's a partner in the firm. First time I met her I asked her why did you get into accounting. And she said because she didn't like people. And she said all she wanted to do is come and do tax returns. But I said also you're partner in the firm. You had to figure something out. And she said yeah I had to figure out how to like people, but she could do the same thing that you said. She could stand in a room of a thousand people and be comfortable as heck. But in any type of networking situation she didn't know how to get into the conversation nor did she know how to get out of the conversation. And I'm going to share with her jumping in the elevator and greet people. Now as you're telling that story... So if we get on the lobby level and I'm going up to 430 and you go hey my name is "Chris Jenkins What do you do?" I think I'm hitting two or three to get off because you just freaked the hell out of me.

Chris: [00:15:36] It does. It catches people off guard, and you have to learn how to manage that situation and make them comfortable. And I think you know a lot of people like myself who - I believe I'm an introvert people say I'm not - But when I'm in that situation I'm uncomfortable because, number one, what if they want to talk about something I don't know about? Because I like to know what I'm talking about. By nature I'm an I.T. guy. Not a lot of sports talk. And every time that I go someplace there's a lot of talk about sports. So I have to find my way through then I have to get comfortable, and if I can't get to that point where it's a comfortable conversation, what I was missing was how to end the conversation. In the elevator, You very quickly -- they can't escape until their floor comes so you have a limited amount of time to make them comfortable. So you can you can start by offering something up about yourself. There were several instances where I said you're not going to believe this but this is actually part of a training program for me. I'm an Association professional and I need to learn how to engage with people. And that's part of my job. So I'm on the elevator day and I want to know what what you do so that I can engage with you, and you have to learn how to be honest and put yourself out there. And I think that there's more room for that type of training on how to engage face to face because of all of the technology. We've lost that skill, and I lost that skill because I was working with machines.

Peter: [00:17:00] Yeah.

Chris: [00:17:00] So I think that you're going to see more of a need for that. And I think people are more comfortable now broadcasting to a larger audience, but they've lost the ability to actively listen and engage in a conversation. And what I mean by that is people are really good about screaming now, but not so much listening and then formulating an opinion that can be distributed one on one without causing offense.

Peter: [00:17:26] Well-put. And for those of you who are listening to this, take his advice. Actually I'm going to try it out next time I'm in an elevator. I love that technique. It's something that was never introduced to me in my career, and I'm going to keep passing that along to people because I think that's a great way.... You have a point. A lot of times we have forgot how to engage in a conversation. Active listening, or as I like to call it listening to understand (from an improv perspective) goes a really long way in connecting. And your job, especially now in your job, as the CEO of the South Carolina Association CPAs, you have to engage your membership.

Chris: [00:18:07] Absolutely. And that's one of those job skills, and the reality of the job, that I think a lot of people miss. So when you say engage the membership, there are a lot of people that believe, in this job, that you can go places where there are 10, 20, 50, 100 people. You can pick your numbers. So it's very easy to trick yourself into believing, as the CEO, my time is so valuable that I'm not going to meet a group of one, two, or three members.

Peter: [00:18:36] Right.

Chris: [00:18:37] You can't think that way because quite honestly, if you were in a group and you're trying to engage someone in a topic where you want feedback, people naturally want to be nice. They want to be polite, and in a group of 20, 50, or 100 you're not going to get reliable feedback. You're just not going to get it. So it's so important in this job to be able to go in and make people feel comfortable with giving you bad news, or news that they think you don't want to hear. So you have to build that trust, and the only way to do that is in very small groups and to lay yourself out there and say really what I'm trying to do. I'm not superhuman. I know that I'm the CEO and I'm supposed to project I have all of this knowledge, and I have a lot of knowledge, but what I really need to know is your honest assessment. As a member, what are the things that cause you to pause in the solution that I'm offering? What would you do differently? How would you communicate this? And if you can't build that trust, if you can't make them believe that you're actively listening and listening to understand them, you're just going to get what they think you want to hear. And that is the most deadly thing that you can have in a leadership role -- a bunch of people telling you what they think you want to hear. I really would encourage everyone to focus in on that. Building relationships a lot -- and I mean a lot of relationships, those one on one relationships -- if you want to be successful in a leadership role.

Peter: [00:20:06] You've been in that role for two and a half years. How many members do you have?

Chris: [00:20:11] We're up to 4600 members.

Peter: [00:20:13] OK. So you have 4600 members, and you've gotten to know probably a vast majority of them over the two and a half years, and in the association world I've been hearing this a lot: a shift in a word from member to a word of customer, and we had this conversation in Miami. And I've been I've been asking people in the association What's the difference between a member and a customer? And I've had a lot of different answers, and I've told you this but quite frankly the one that you told me by far resonated deeply with me because I think you hit it on the head. So if you could explain what the difference we are a member and a customer is in this engagement process.

Chris: [00:20:58] Very simply, the difference between a customer and a member is the experience. So you have customer experience and you have membership experience. The word that comes to mind is fellowship. You know you have to look at your business and you have to see what you're selling. From a CPA Association standpoint, we are selling, currently, what we've shifted to is selling CPE... But that's not what we're about, and it's because the market has gotten so difficult that we've tried to balance between is CPE a member benefit or is CPE our profit center? And when we start looking at CPE as a revenue stream and membership as a revenue stream, it's easy to start looking at people as customers. That's not the right way to do this. An association -- The power of an association is the fact that you have a group of people all fighting for the same or common cause, and CPAs want to protect, promote, and grow the profession. What they need is a network of peers that they know that they can count on; that they can rely on. They need a community and they need that fellowship, and that's what we as an association foster. That's why we were created. And I think that the big difference is, when you look at customer service, you want to make sure that that individual customer has the best possible experience. And then when they're gone they're gone. So a customer relationship is something that short. A member relationship is a long-term relationship, and it's not just a relationship between the company or the association and the member. It's about fostering the relationship between the members themselves. And when you look at how associations were built, and then they have chapters, that's to create those networks; those personal networks. And that fellowship is the most important thing that we do as an association. You could take away everything else that we do and then go out and rebuild from ground up, if you have that community; if you have that fellowship; if you can start those conversations. But if we continue to say what we are is customer and business driven, we have a problem. You can look at it from the other perspective as well: as an association, our stakeholders are our members on our board. That's who gets the pay out of our efforts. In a customer relationship, your payout is to stake holders who have invested in that company. So your goal is to get as much money as possible from your customers so that you can pay out to your investors. We have a completely different goal. Yes it's a business, but it's a completely different goal. Our goal is to give our membership the maximum value for the minimum price, and we've lost sight of that in many ways. Associations in general have lost sight of that because they're fighting technology. They look at Facebook, linkedin, social media, and they're saying well "this is creating that community outside of it," and that's wrong. It's actually helping with those communities. Let me give you an example of this, and this is you know technology in general. In my generation, when I was born, the microwave was fairly new. There wasn't a lot of microwaveable dinners on the shelves and there weren't a whole bunch of those things going on. But I grew up in a time where that was all evolving and the microwave was new and it was cool and all of a sudden parents didn't have to come home to make dinner. They're going to go to the gym and they're going to do aerobics in the 1980s and fancy hairdos. So you have Gen-Xers who are at home learning how to microwave their own food. And we learned how to do that and we ate and we did all of that wonderful stuff. But I'll tell you what... By the time I was about 14, I wanted a home cooked meal. I was done with microwaves. And still to this day we have a microwave. We'll heat things up in it. But I will never eat another microwaveable meal in my life. We have it in the office. I'll skip lunch before I actually put a frozen meal in there. And I got sick of it. So when I go out now and I do student presentations, when I started doing them I was like we'll go to our website, fill out a membership application, and you can be a member for free. And I would get maybe a 5 percent turnaround on that. When I go out now, I take paper with me. Everybody's asking to go online and do stuff, but they'll fill out the paper because it's there in front of them and everything is fresh in their mind. The benefits are fresh in their mind. And the number one thing students asked for me is where can I go meet members in person? Where can I talk to CPAs: people who can actually tell me why I should continue on in my education and go through all of these hurdles to become a CPA. They're tired of social networking. It just is. It's like a microwave to them. It's just there. Yes if I have a question I can go get an answer, but it's not how I want to get information. Our unique value proposition as state CPA societies is the fact that we're local. We have local networks in every community. We have a local network at the state level. We have local meetings with real people, both social and educational. And when we embrace the fact that we're local -- when we don't look to compete with national brands for CPE; when we don't look to compete with Facebook and we find our true competitive advantage, which is the fact that we're here, we create a very strong network of professionals -- and that network has incredible power. These are members are smart. We're vertical. It has incredible power within the community. We can get things done. We make positive impacts. Students love that. We make impacts at the State House because legislators want to know what the decisions they're making and how that actually impacts the economy in the state. We have the members to do that. And as far as revenue goes, we have a huge potential with our sponsors and our partners to get them in front of trusted business advisers; decision makers. We as an association again coming back to we need to provide the maximum benefit for the lowest cost need to be utilizing those agreements, Those partnerships, to further reduce the cost to the CPA to get them the benefits that they need to shore up that community and reduce their costs in running their business, and that's where we need to focus. And quite frankly, when you look at what we've done -- and we've all done it -- we're chasing CPE and trying to compete on a national level when really what we need to focus on is what's right for our state, and this translates to all associations. Who are your customers? What do they really need? Have you had the discussions with them? Have you gone out and talked to them? Or have you gone to 14 different conferences and said wow that's cool we should try that?Understanding your membership, creating fellowship between them, creating that relationship... That's what we're about. And that's the difference between a customer and a member. The member is someone that you're working with and for -- a customer someone you're serving. And that's that's a big difference. We need to create fellowship among the members.

Peter: [00:28:27] And in your two and a half years... I don't know who your predecessor was, but I'm going to make an assumption that your membership has really gravitated to this model, per se. The thought process that you that you bring to the table.

Chris: [00:28:40] I think it's just natural. It's not something... I don't I don't go out and say here's what we're doing right and here's what we're doing wrong. I've made adjustments to how the organization functions. I focused in on experience and I'm going to continue those adjustments, but I look at... we're responding to the world around us. We have increased our engagement. We have increased our membership. We've increased our membership by about 1000 since I've been here. I'm not going to say I'm doing the right or wrong things, but I will tell you that I believe in what I'm saying -- that what's important is that fellowship, and I hear that from our members. So you know when you look at something like a chapter, a state chapter, that's where that local community networking begins. When I go out and talk to my larger firms, one of the issues that they bring to my attention is "We have new staff. We need them to be able to engage with other people and get comfortable with that." And the way that you do that is through those local events and local meetings. And when I hear from people that what they really need is person to person engagement... That's what this association was built to do. I'm just going back to the roots.

Peter: [00:29:54] So this person to person engagement... they're asking for it, now is it is a generational? Because I hear all the time you know that's what baby boomers want, but the millennials just want to be on line and stuff. But what I'm hearing from is just the opposite.

Chris: [00:30:08] Every person is an individual. So there's there's a lot of labeling going on in society right now, which drives me absolutely bonkers. Every person is an individual. Do the millennials understand that they can get information online? Yes. Are they efficient at it? Absolutely. But when you talk to them, they also understand the reality of a personal connection and an engagement. There is a difference in the mentality here... My generation, and I'm an X'er, but I was always told children should be seen and not heard.

Peter: [00:30:48] Yeah same here.

Chris: [00:30:50] So I was taught that you listen to your elders and you don't really engage them. I'm not going to try to teach my grandpa something. In fact I tried on several occasions. It did not work out well for me at all, but the expectation now, from a millennial standpoint, is that they want to learn from someone, but they also want to share their knowledge because that's the engagement level that they've had in their lives. Their parents have asked how do you feel? What do you want to do? So when they look for a personal relationship, they're looking for a two-way relationship. I believe that's changed. I think that's generational. But I don't think that millennials don't want to have human interaction. I hired a millennial in Ohio. I mentored him, and it was challenging. I mean it was really challenging, but I was also challenging to mentor. So but we have a great relationship still to this day, and he appreciates that. And I did. I would listen to him, and sometimes it was painful to listen to him. Sometimes he had a great idea, and other times I would tell him he was wrong. And I think that that's really the key: as professionals, we've grown up, we've built our careers, but we've lost the ability to take the time to listen, and they expect you to listen. And I can make a decision normally within the first 45 seconds of a conversation of hearing an idea of going "Yeah this is going nowhere." And I've trained myself to stop and to actually let someone get through that idea and then say OK let's look at your idea. And I'm just going to give you some things I need you to think through. If this happens, or if this were to happen... and I don't pick it apart. I'll give him two to three things to work on so that they can rethink their idea and they can make it stronger. Because I don't want to give up on the idea. That takes an exceptional exceptional amount of time and patience. And when I go out and I do generational talks at firms, this is where it breaks down. Right? Well I don't have the time to sit with someone for 15 to 20 minutes to go through and then tell them they're wrong. Isn't it better just to tell them up front so they don't waste the time? No idea is wrong. I learned this from a professional speaker early on. No decision is wrong. No idea is wrong. From a decision standpoint, if you make a bad decision you're just going to make other decisions to fix it. And any bad idea can be rebuilt into a good one. So we have to think that way -- that's what the millennials expect. And if they don't get that relationship, if they don't get that from you from the from the starting point, then you're off to find another relationship. They're not going to work with you to try to make you a better person because they don't believe that you're willing to make them a better person. So no I don't buy into this concept that this entire generation all functions the same way. I have three millennial children. None of them functioned the same way. One is very liberal and one's very conservative you know. It's their own thought processes, it's their own experiences, that are going to build them into the type of person they are. And we damage ourselves -- seriously damage ourselves -- by saying that this generation acts this way.

It's dangerous. There are definitely things that you can learn from generational research. But when you look at that... what I would what I would ask everybody to do is, when you when you do your genetic racial research, when you hear this, don't put that on the generation. Take it back to yourself and say "How can I function differently to compensate for these expectations? How can I create more flexibility in my business to allow for these people to interact with the community?" And you'll hear this in every millennial presentation. They want to change the world. How do you do that without engaging people? It doesn't go together to say they only want to work online but they want to change the world. Habitat for Humanity, food drives, soup kitchens -- You always see millennials. There are people there. If you want to capture millennials, have places where they can engage with people. And we all hear technology -- and technology is a crutch. Everybody thinks it's this magic thing that's going to fix it, and when we do that we focus on tech now technology and we lose humanity. And you got to get away from it. Technology is not a savior -- it's a tool. It's not a solution -- It's a tool. You have to get away from thinking that you can buy a gadget or implement a system that's going to save your world or your business. It's all about the people.

Peter: [00:35:54] Well said, and as I'm listening to you, you use a lot of the principles of improvisation in your management style and you said this work continuously through this conversation about listening, listening to understand, and the other one that you just brought up and an improv is bad ideas are just bridges to good ideas -- no ideas lead to nothing. So I love that when it takes... like you said, your initial response whens someone gives you an idea, if you don't think it's right, you want to shoot it down. It takes a lot of patience and it does take time to explore that idea. Have that person tell you their thought process and you kind of you kind of guiding them and you're you're teaching them. Did you think about this? What about this? We need to look at that. And ultimately maybe they'll find a way to come up with a better idea or they'll create a whole new idea based off of the conversation that you're having. But as as I said in a lot of my presentations you know... what I love to do is get a roomful of CPAs and, before we start my presentation, I go what business are you in? And I hear we're in the auditing business, we do tax returns, we're in the consulting business... I go that's a byproduct. You know business you guys are in? You're in the people business, first and foremost. Everything else is a byproduct. Without people, you have no business. You have nobody working with you, you have nobody to sell to. Once we figure that out, make the engagement and build those relationships because we're not in a transactional business -- we're in a relationship business and it's all about managing relationships. And I had a firm who was looking for a project management course, but they had two prior. And we sat down and we were talking I said You guys don't need a project management course. You need a relationship management course because it's about the people. Your people are your bottom. The lack of conversation that you're having with clients is causing a lot of this backlog. So you've nailed it right on the head. It's all about the people and It's all about the conversation you have with them. Creating that fellowship. Because when I look at an association, I look to others within the organization, within the membership, that I can draw that knowledge or ask questions or engage with. You know to some degree we can be considered a club, and people join clubs to share that information, to have that fellowship, to have friends and stuff. And I see some associations that have completely lost that path. And we talked about this in Miami, and I got this from the author of The Trust Edge, David Horsager, that everything of value is built on trust, and once you lose that trust it's hard to create the value.

Chris: [00:39:03] From an association standpoint, from that fellowship; that club mentality, you could have a question, you can go out to an online community, you could go to a white box, which is that you know the association has its own community where you can ask that question. And you might get an answer. In fact you're likely going to get an answer. But what gives you more comfort? What do you trust more? Picking up the phone and calling somebody that you've met, that you know, and getting that answer, or waiting for five or six people to give you an answer online? And I think we have to have both. But at the end of the day, the person that you have that relationship with, that person that you trust, those are the people that you're going to to turn to. And when we look at the value of the association, once again, you go into a firm... once they recognize they're in the people business, they start trying to figure out professional development, and associations have tons of professional development topics. It's hard to get people to go to them because everybody's chasing the ANA and the tax credits. But if you want someone to learn how to network, how to create relationships, how to do business development... Don't send them to a course. Send them to an event where they actually have to engage with their peers. Let them make those connections. Let them build that network in comfort. And they're going to do that. They're going to learn how to do that. One of the best things an association can do is actually build relationships with outside professionals. So you have things like the ABC forums where attorneys, bankers, and CPA are getting together. You can do the same thing with realtors, and really from the association standpoint, when you look at professional development -- and when I say professional development I mean those soft skills about public speaking, engaging with people, and doing those types of things -- the best way to do it is to have an environment where people have to do it. You go to a classroom for an hour to four hours, you can learn the underlying tools. I speak with Rob Sherman and he can tell me everything I'm doing as a professional speaker is wrong. But go ahead and keep doing it. But I'm going to apply the tools the way that they're going to work for me. But when he actually gave me an action where he forced me to do something I became good at it. So when you have association networking events or social events or those types of events, that's where the value of the association comes in. And we do see a decline in those programs. I hear from my chapters that nobody comes. Make a different event because we have to make those events and we have to impress upon people why they're important. This is your hands-on professional development. That's what it is. You're not getting credit for it. You don't want the credit for it. What you want is an action to come out of it. So that's really again the power of the association. That is the power of business in general. You're absolutely right. CPAs are in the people business, and in my my role, even with other association professionals... "Oh you got to work with the CPAs, That's got to be fun.

Peter: [00:42:16] Hahaha.

Chris: [00:42:16] It is! CPAs are some of the most engaging people that you're going to find. The majority of CPAs are very personable. They have to be. They can't be successful unless they are. And I find that, in the firms, that's the most frustrating things for partners. "My young people won't go out. They won't learn how to do this." You're not going to learn this in a college class. Right? They're used to having a very tight knit groups that they're assigned to. They get assigned to a group, then they make friends within the group, then they work well together. As a boss, you have to you know take that information that you know about this generation -- how they were brought up -- and say OK I'm assigning you to this chapter. You're going to go to these chapter activities. You're going to interact with these people, and that's how they're going to create their network. And it's not a matter of forcing them to do something they don't want to do. It's encouraging them and letting them know that they need to do this.

Peter: [00:43:17] I challenge partners, when they talk about the people won't go out and do, I ask them Do you take them with you to a client? Do you bring them along? What they can learn in a car ride, what they can learn, to your point, to the observation of how you're interacting with that client-- and also you know if a partner goes to the client, gets all this information, comes back, and gives it to a staff member... They're not getting all the information. There's stuff that's been left out. I've always said that, when you have a meeting with a client, you take the whole team. So they're there, they can process it, and it will save time and money down the road. The other aspect, which I find hysterical, is we go to conferences, but we don't look at the conference as a form of networking. It's in our mind it's CPE. It's learning. Why would I want to meet other CPAs? I was in Dayton and I did this networking class, and I had to get up, meet some people, business cards, all of that. And I tried to... I asked who brought their business cards, and most have raised their hand. So I asked what do you use these for? And this one lady absolutely said I use mine to put in the fishbowls so maybe I could win something from one of the vendors, and in a very polite way I guess is that the best return on investment for that business card? I think it's just a change in thought process that you know CPE can be some of the best places to network, if we tell ourselves that versus I'm only here to learn, and even though there could be 20 people in the room, there could be 120 people in the room, there's still people that they haven't met. Just to say hello.

Chris: [00:45:07] CPE is broken.

Peter: [00:45:08] Yes!

Chris: [00:45:09] It's horribly broken, and in so many different ways broken. When I came to South Carolina, it was a 100 year anniversary. So I came in and, in the office, there were a hundred years worth of minutes, and I'm a history buff so I wanted to go through these minutes and I learned a lot from them. And I learned a lot about the association and when it was formed. There was the Women's Auxiliary. There were all of these groups around the association that were social in nature; that allowed for you to create networks and develop business. We look at a CPE program and how it's developed today at an association level. Our goal is to get people there at 8:30 and out by 4:30. We do that to ensure that they don't get stuck in traffic.

Peter: [00:45:58] Right.

Chris: [00:45:59] Well that kills any opportunity to have any networking event afterwards because nobody wants to stay -- they want to beat traffic. So you kill your networking afterwards. We ensure that there's not a lot of breaks because we want to make sure we get the total number of hours required for compliance, so there's not a lot of breaks. There's no networking there. When I go to a conference, people sometimes will make fun of me. And there are a couple of my peers that we work very well together because you won't see us in sessions all the time. I will choose the sessions at a conference based on what I want to learn -- not based on total number of hours or credits I want to get because I have to have... I have two credentials, both require 40 hours of CPE every year, and neither overlap. So I'm going to. But I'm still going to go to conferences. I may only get eight hours of credit at a 16 hour conference. That other time. Yes. I'm sitting in restaurants. I'm sitting in lobbies. I'm sitting by the pool. But

I'm getting the best information I can get about running this association. These are all CEOs or CEOs or learning managers from larger or smaller states. I understand their problems. We share ideas. When new people come in, we try to encourage them to not go to all the sessions. To actually come join us in these discussions. As associations, when we build our programs, we don't build that in anymore. All the time complain that our members, our CPAs, are just looking for hours. They want to be compliant. But we build a system to ensure that's all they get from our programs! It doesn't make any sense, and you're absolutely right. When you go to these events, you have to think this is a business development opportunity, and then coming back to you know that car ride and what you can learn in those things... how many partners are still going out as often? Have we decided that that's not good a good use of time for partners? Are they doing phone calls, conference calls, e-mails? Because you can't read the body language. I don't know how many times that a meeting has been put off and put off until the customer or the member is so enraged that you have to go speak with them. Whereas if you could have just had that communication in person, you would have been able to read that body language; you would have been able to see that up front. So again, when you go to an event now, what you see is a bunch of people with their noses in their phones instead of talking to people.

Peter: [00:48:26] Right.

Chris: [00:48:27] And when we have to deliver bad news, we always use technology because we don't have to face the consequences. Again, using technology in a way it's not intended to be used. And we've got to back off of that and come back to humanity and realize people have feelings. People want relationships. We have to put more emphasis on that human connection. And it bothers me to hear. Robots are taking over. AI is the future. We've got to come back to humanity. I read a great article this morning and I loved it. There's a mall in D.C. that it put out its first Robocop. So its security guard was a robot, and they were all excited about it. This is the future of policing in the mall. It has gun detection and all this stuff. Ran for three days and went into a fountain.

Peter: [00:49:18] Hahahaha!

Chris: [00:49:18] Now if there is a point that humanity actually gets to the point that they can't think and they do that, then the robots win. But technology is allowing us to do that. It's allowing us to have attention spans of eight seconds. It's allowing us not to communicate, to not have crucial conversations. That has to stop. And I'm a technology guy, and I can tell you that the magic in technology is not there. It's all smoke and mirrors. The only thing that makes technology great are the humans that use it, and if you use it properly it's a tool. If you continue use it improperly, it becomes a hindrance, and that's really where we're getting to. We have to create human experiences. As associations, we are uniquely positioned to do that and we have to come back to it. Will there be members upset that we have a 10 hour day and only eight hours of credit? Absolutely. But will they gain more value through those human connections? Yes. And we have to build that. And if we want strong future CPAs, if we want to take the millennials and make them into great professionals, if you want to take Gen Z and make them into great professionals, you have to give them the same experiences -- the same advantages -- as we gave the boomers, as we gave the Xers. Don't take that away. Make it more important. That human connection is what's made this profession great because that's what's required to make it work. As associations. quit taking it away. As businesses, don't keep your young people in the office. Don't fear somebody poaching them. Make a better office and go out with them to meet people and help them build those networks. That's what's required to really grow the profession and make it truly great, and we can help you, at the state level, with that. Sorry, sales pitch. I know it's preachy.

Peter: [00:51:07] Oh no no no no -- it is a great sales pitch by the way. But it is real, and I agree with you 100 percent that technology is a tool. We need to get back to the human factor. We need to show more empathy and realize that we are in the people business, and it doesn't matter if you're a state CPA society or a national association or a business or whatever. We have to get back to that. And we also have to deliver bad news face to face and quit hiding behind the damn phone, or the damn e-mail. Crucial conversations... Tell me when I'm wrong. I'm a big boy. Tell me when I'm screwing up. I look for that feedback. But we're so afraid of hurting someone's feelings... But if we stick to the facts, and keep emotion out of it, and deliver the message, it goes a long way. It's just when emotion gets in the way, that's what creates a lot of the problem in delivering those most crucial conversations. Chris, we could go on for another couple hours, and it would be a fun couple hours, but I wantt o have respect for your time. I know that you've a very busy man down in South Carolina and I cannot begin to thank you for sharing your thoughts today, and I hope those who download this listen... you may not agree with what Chris is discussing, but don't tune him out. Do the whole thing about listening to understand. Listen to his position. I think -- I don't think. I know he's on to something, and he's been extremely successful down in the South Carolina Association and will continue to be, and once again I can't thank you enough for taking time to be here today Chris.

Chris: [00:53:09] And I really appreciate the opportunity. I'm a little passionate about this and sometimes a little bit over the top, but I would say is if you don't agree with me -- or if you have a different observation -- I'm pretty easy to find. I'm at the South Carolina Association of CPAs. I'm on Facebook. I'm on Twitter, and my phone number is posted on our Web site. My email is posted on our Web site. Call me. Have a conversation. Because I want to know what is wrong with my idea. I do want to have those conversations. The more transparent, the more open we are, the better overall ideas that we have. But again being a technology professional... it's really hard for me to see a piece of technology and go that's magic, and it has become, over time, easier for me to see the things that are problematic with the technology. I really do want to make friends. I don't even need to influence others. So you know I'm here. I'm available. I love to talk to people. I hear this all the time: I know you're really busy and I want to be protective of your time. My time is best spent learning and talking and listening. That's what I do. So if if you want to do those things, feel free to reach out to me because I'm sure there's something I can learn from you and I hope that there's something that I can help you with. But that's what it's about and I want to I want to make those connections. I'm not just here to tell you how you should do it. I'm here because I want those connections and my network can always be stronger as well. If you're one of those people listening that just like linked to me on on LinkedIn and never talk to me... You're likely going to get pruned. I don't except people on Facebook unless I know you in person, so if you want to be on my Facebook you got to call me. But those are the types of things, again, I'm interested in human connection. And Pete I mean we've known each other for a long time and it's really great to get to talk to you and for you to allow me to rant... You know for an hour.

Peter: [00:55:11] Hahaha.

Chris: [00:55:12] And any time you want, we can talk about anything you want. So we can do technology. I'm always willing to come back. But it's been a great time.

Peter: [00:55:18] I will have you back and we might pick up from this point and and run with it again. But for those of you who are listening, take him up on his offer. Go the South Carolina Association of CPAs and get his e-mail address, get his phone number, give him a call. Have a conversation with him. I think you'll enjoy the conversation. You may help Chris learn something and I'm sure he'll have you thinking in a completely different way. So Chris once again thank you very much for... I wouldn't call it ranting, my friend.

Chris: [00:55:50] Hahaha.

Peter: [00:55:51] I would call it a passion that comes through that you are very passionate about this topic and the subject. And that's what I love... when somebody discusses something with passion, but you're different in a way. You also listen to other opinions. Some people who are so passionate they can't... anybody else's opinion is wrong. You do that listening to understand and you do the things that you know I talk about in improv in order to help create that community. So thank you very much. I'm sure our paths will cross again.

Peter: [00:56:33] I would like to say Chris again for being a guest today and sharing his thoughts on ways to better engage your audience and on association management. Personally, I'm going to try his elevator method and I'll report back in a future episode, or I'll be on the front page of The Columbus Dispatch. One of the two. I have partnered with the Maryland Association of CPAs and the Business Learning Institute to bring an exciting new learning opportunity for accounting professionals to earn CPE credits. You can earn up to one CPE credit for each completed podcast episode purchased for only $29 through the American Association of CPAs and the Business Learning Institute self-study website. The podcast episodes are mobile friendly. Open your browser on your smartphone, tablet, or computer, Go to the MACPA and BLI self-study account, and listen to an episode. Take the review and final exam while you're working out or after listening to an episode on your commute to and from work - It's that easy! While all Improv is no Joke podcasts are available on my website, only those purchased through the MACPA and BLI self-study Web site are eligible for CPE credit. You can get detailed instructions by visiting my website at www.PeterMargaritis.com and clicking on the graphic "Improv is no Joke for CPE credit" on my home page. Remember you can subscribe to my podcast on iTunes, Stitcher, and Google Play. If you'd like to purchase an autographed copy of my book *Improv is no Joke: Using Improvisation to Create Positive Results in Leadership and Life*, for $14.99 with free shipping, please go to my website, PeterMargaritis.com, and you'll see the graphic on the homepage to purchase my book. Please allow 14 days for shipping. You can also follow me on social media. You can find me on Facebook, Twitter, LinkedIn or Instagram. Remember to use the principles of improvisation to help you better connect and communicate with those in your organization.

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