

## PART I

# Professional Interaction and Reflection Skills



## CHAPTER 1

# Where Are You Going?

How much time have you spent planning your life? How much time have you spent thinking about where you are headed? Do you know where you want to be in five years? Have you ever dreamed about how much you can achieve in the next 10 years? It does not matter if you are 20 or 60 years old, the questions are yours, and only yours, to answer. If you were to envision the most ideal scenario of where you would be and when, what does it look like? Many accountants I have met and worked with have not invested much time in planning their life and how to live out the most successful version of themselves they can visualize. Most people have not defined what that successful version looks like. They feel they are either too young (Why should I be thinking about that stuff now?), too busy (I have no time to plan my life, because I cannot even plan my day!), or too “stuck” (I do not have much control over what is going on in my life. I just do what is asked of me!).

It is very easy to ignore these things or not think about them. It is extremely easy to get stuck in the day-to-day responsibilities we maintain, and you cannot plan your life in one day or even a few days. Let’s turn on your self-reflective mode for a little while and have you ask and answer some questions that will provide you with a base for planning the life you want and becoming the person you want to become. We are not talking solely about your career. We are talking about all aspects of your life and your future.

It is absolutely amazing how much you can achieve as an auditor when you are more self-aware and intentional about your growth. That is one of the reasons this book was written . . . to uncork your potential.

This book is about being intentional, reflective, and proactive about the development of your leadership skills. It is about having a big plan and having lots of little plans. It is about never forgetting your big plan and always being able to forget your little plans. The skills discussed in this book are centered on your career in auditing, but they can be leveraged in many aspects of your life. Becoming a better leader does not pertain only

to circumstances where you are leading a team; it pertains to all that you do, whether you are “leading” your family, working alone, or working with a large group of people.

Let’s dive into you and take a grander view of what you stand for and desire to achieve. While achievements and new skill development are great and should be celebrated, the real value in specific achievements is how they help you to become the very authentic, successful person you desire to be, or maybe the person you already ARE but just have not realized yet. So now we want you to ask yourself this question: **Who is the person I desire to be, the person I already am (buried deep below the surface)?**

To answer this question, you should ask yourself a few questions about what matters most to you:

- What are the most important roles in your life you aspire to master?
- What is your mission?
- What are your core values?

## Your Roles

Take some time to focus on and identify what you consider to be the most important roles in your life. Most people will limit the number of roles they uncover to five or less, not because there aren’t more roles than that, but because limiting the number of possible roles will force you to think about the general and most important ones that you feel you have and want to excel in serving. The roles you identify will probably be centered on the most important responsibilities and relationships you have. Some examples are:

- Spouse
- Parent
- Friend
- Leader at work
- Community member

Now spend some quality time thinking about what each of these roles mean to you. Why are they important? How do you become wildly successful in fulfilling that role over time? How might others see you in this role? Spend some time pondering the role you have identified. Why is it important to you? How do you feel in serving that role to the best of your ability? Some people can complete this exercise rather quickly, while others will spend hours and maybe days thinking about it and documenting their thoughts. Let yourself go a little bit when answering these questions and uncovering your roles. Don’t get caught up in judging your thoughts and feelings too quickly. There are no right and wrong answers here. Consider

getting away to a place where you can do some real reflection. You are documenting the most important roles you live in your life. These roles ARE your life, and you will be spending a lot of your time in fulfilling them.

Here are examples from two of your fellow auditors. Keep in mind that neither of these was crafted in one sitting or in one day. It took time and many revisions to explore and refine these personal role definitions. Both of these people not only spent a few hours or more brainstorming what the role meant to them, they also went so far as to ask their family and friends for feedback and input. The input from others was very useful. It allowed them to see themselves through others' eyes. They both reported that the process of uncovering their roles and obtaining feedback from others was just as valuable as the documented end product. One of the auditors chooses to review this role on a weekly basis; the other on a daily basis. As they deemed necessary, both made changes to these role definitions since they first documented them.

### **Example 1: Family Guardian**

"Currently, I am a single mother with two children. That brings challenges at times, some very difficult challenges. I see that as a blessing in my life, as it has taught me to be disciplined and hopeful at the same time. My children are very important to me and I serve my role in ways that provide for them financially, emotionally, and developmentally. The most important thing I do is spend time with them, both in terms of quantity and quality. Anyone can give them money, anyone can give them shelter, but nobody else can spend time with them as their mother like I can.

This role provides me inspiration to use all the time I have in the most efficient manner and to value quality time with my kids."

### **Example 2: Body Protector**

"I choose to protect my body both physically and mentally, because I know it allows me to accomplish what I want to in life. It affects my relationship with my wife, and I cannot help but think of our future together and that being in good physical shape will allow me to enjoy a long and fulfilling life with her. By exercising regularly, I am energized on a daily basis. I take this role seriously."

Choosing your roles is a personal exercise and decision. Only you can do it. The more authentic it is to you, the better. One auditor chose, for example, to document her role as "Self-Server." That sounds kind of selfish, right? This person actually struggled with being selfish enough. She caught herself saying yes to everyone but herself, so she created an important

role focused on being more aggressive about looking out for her interests. The surprising result (to her) was that by looking out more for herself, she actually became more energized to focus on her other roles, roles that affected others around her!

Another auditor chose "Volunteer" as one of her most important roles. She did serious reflection, received valuable feedback from friends, and realized this was a role she cared about and was already living. This role covered a lot of the work she did with charitable organizations. It also covered some things she did at work, including serving on a committee that leads the company's initiative to encourage employees to be involved in volunteer and charitable organizations.

Carefully choose your roles. If you are someone who spends a lot of time in your career, working hard at your job, one of your top roles will probably be related to that, or better yet, one or more of your roles is served every single day you show up to work.

## Your Mission

Forget that you are an auditor for a second. Think about your personal mission in life. What is it? What is the BIG AUTHENTIC AGENDA that you have and want the world to witness? This may not be an easy question to answer. Your mission will not be easy to define right away. It may take some time ... time well spent. There are a number of ways you can go about identifying your personal mission. Here are a few:

**YOU ARE DEAD.** It is the day of your funeral. People are sad. You are happy because you get to see everyone and listen into what they are saying. All the people you care about are there and they are talking about you in a joyous way. What is the most common thing people say about you and what is their tone? What do you want people to say about you? How do you want to be remembered so that EVERY single person there mentions the same qualities and ideals? They are all saying you lived for something and you really stood for something. It was a cause, but what was it?

**THINK ABOUT OTHER PEOPLES' MISSIONS.** They may have one, they may not. Consider your doctor, for instance, or the doctor that cares for your spouse, or daughter, or brother. Doctors take care of the most important people in your life. Think about the doctor as a single person. What would you like this doctor's mission to be? You probably would not want it to be: **Become rich and buy the biggest house in the area by getting patients quickly in and out of my office and charging them the most money.** It would

be something much more profound, deep, and meaningful. The mission statement would make you feel good about having your loved one's care under this doctor's direction. Some examples of what that doctor's mission statement could be include:

- To treat every human being who walks through my door as if they were my family
- To improve the health of every person I serve
- To help others realize their fullest healthy potential

Notice that those statements vary to a large degree, and though they are general, they could be used to help with day-to-day decisions and year-to-year goals. They provide overriding guidance on why this person wants to be a doctor and how he or she wants to feel at the end of each day in trying to serve the mission.

The doctor is a powerful emotional example of someone with whom you want to be associated in a meaningful way. Wouldn't you feel better about taking your family member to a doctor who has a mission statement like one of those listed?

Now start thinking about your own.

What is the one sentence you can create that will describe your mission? It is typically not a statement with a destination. It is not something you achieve one day and then you are done. It is something you can look at and ask yourself if you are achieving it EVERY DAY, living it EVERY DAY. It is a sentence that must have real meaning to you. The more authentic it is, the more powerful it will be to you. You must create it and then OWN it. This may take some time. In fact, you may be tweaking it for years. That is fine. Just spending some time in thinking about these things will get you started down a path in your life where YOU control how success is measured and where YOU can hold yourself accountable for living to YOUR standards.

The mission statements presented over the next two pages are examples provided so you can get a better feel for what is being illustrated here. They may help you create your mission statement, but one of these cannot be your mission statement, simply because it is not yours. Your statement must be written by you to be effective. It has to come from inside, and it has to be something that means so much to you that you are willing to fight for it. Don't worry if you cannot create one right away. It is very difficult to create a one-liner that is your mission statement. It takes a lot of time and thought.

Sometimes it's best to just start writing about what you care about most in life. Then you can extract your mission statement from those writings. This process works well for most people. First, write about yourself and what is important in your life. Maybe include a story of something that

happened in your past, an event when you really felt high on life. Why was that? What can you extract from that story that helps you to realize what you stand for and what your “cause” is?

One auditor spent some time reflecting on her life and discovered a very powerful trait. She really enjoys teaching others. This was apparent to her during college, when she would help her friends study and provide tutoring to elementary school kids near her college. It also became apparent in her 10 years in the auditing profession, as she realized her favorite moments were helping younger auditors learn on the job. She frequently signed up to help her organization with internal learning initiatives, and recently she had begun teaching classes to interns and first-year staff at her company. She never spent the time to reflect on her attraction to teaching and helping others learn until she focused on her mission statement. So she came up with: ***To help others learn and grow.***

Pretty simple, huh? What she REALLY likes about this mission is that she can expand it to so many parts of her life, and she realized she was already living her mission!

You may choose to be more specific in your mission statement by including more details about what matters to you. Here is a more detailed example, or a more general example, depending on how you look at it:

*My purpose is to live life to the fullest by always listening to others, valuing all my experiences, and continuing to challenge myself to enhance the most important relationships in my life. When I look back on my life, I see someone who appreciated everything that was given to me. I made the most of the strengths I was given.*

Note that a personal mission statement does not need to have “measurables” attached to it. Goals should be measurable, and goals might be helpful in aiding you to meticulously live your mission over short or long periods of time. A personal mission statement, however, is powerful because you can use it to challenge yourself EVERY DAY on how you are living it.

Some additional personal mission statement examples:

- To bring quality to everything I touch in helping to vanquish illiteracy from this world.
- To help small business owners succeed.
- To delight in helping others realize their full potential.
- Because I can.



The last one, “Because I can,” might not make much sense to most of us. This person uncovered a great sense of purpose in helping others, but he liked the simple slogan “Because I can,” which referred to how grateful he was for what he had in life and in turn he felt a great sense to help others simply “because he can.” It was very authentic to him.

Your mission is about defining your purpose. The task of defining it, much less living it, is difficult enough but can be very rewarding and a personal guidance tool to challenge yourself to be the person you want to be. Start today!

## Your Core Values

What are the characteristics that you value more than anything else? What characteristics are so important to you that you will sacrifice in order to live them?

So many things that are important to us can come and go. Achievements, awards, people, relationships, jobs, careers, and EVEN ROLES, the very same important roles that we discussed at the beginning of this chapter . . . all those things can come and go. But the values that you hold true to yourself, that you honor and practice, that you stand for . . . those can be present through your thoughts and your actions every single day, for the rest of your life.

Integrity is one of the most common values found on organizations’ Web sites when they are describing their core values. But what does integrity mean? It sounds like a good thing, but until you can describe in detail what it means, it’s nothing. So if the term “integrity” has been presented by a company as a value, ask yourself: Does every employee agree with that and does everyone in the organization truly value that characteristic, enough so that they are willing to sacrifice for it? It is actually easier to uncover personal values than those of an organization, because your personal values are YOURS alone.

Until you can describe a value in detail, you cannot hope to live it, or be formal about continuing to live it as one of your core values. It really does not matter what the specific dictionary definition is, just as it does not matter how other people might define a word that you use to describe one of your core values. All that matters is what it means to you. Below are some common examples:

- Honesty
- Creativity
- Audacity

- Loyalty
- Professionalism
- Appreciation
- Relationships
- Listening
- Courage
- Promptness
- Responsiveness
- Simplicity
- Enthusiasm

Many of those values sound honorable. You may WANT to have all of these as your core values, but that is not practical. A core value must be uncovered more than “adopted.” You probably already have core values—a few characteristics that already mean something to you, something really important.

Consider asking those people close to you about their perception of your values. What are the few words they would use to describe you? Why? When and how did you exemplify the values they have listed for you? This exercise may be enlightening and empowering to you.

The list above is very short in comparison to the huge amount of values that are possible. What you need to do is understand and, if you choose, document what your values are, WHY YOUR values mean the most to you, and what types of things you do to practice these qualities. Below is a simple example of how to document and describe a core value:

Honesty: I put honesty above everything else. When I say something, it is always the truth.

## Roles, Mission, Values: Tying It All Together

So why did we have you think about these three subjects? Even if you were able to put some serious thought into your roles, mission, and values, what does that have to do with your leadership skills and your life planning? EVERYTHING. When you are making your goals for any given year, when you are making big decisions in your life, it will be very useful to you to have these things defined and documented. It will help you bring purpose to everything you do. Revisit your role, mission, and values often. You may start to do it automatically when making decisions. Read through your core values when making BIG LIFE DECISIONS. We will also revisit them with you later in this book.

## **Leadership Summary**

Your foundation for being a leader comes from uncovering who you are and what you stand for in your life, both inside and outside the office walls. Only you can do that. Uncovering what you see as the most important roles you serve, your core values, and your mission will provide a foundation to guide your actions and make decisions both big and small. These three things, when all is said and done with your life, will be your LEGACY.

