



Goal Setting and Achieving Success

PRESENTED BY
ROGER PHILIPP, CPA, CGMA
AT THE 2017 BETA ALPHA PSI ANNUAL MEETING

We believe the key to success
is *enjoying* what you do.



Choice program of the
nation's top firms and
universities



The profession's most
*Efficient, Effective &
Enjoyable* eLearning
Program



88% pass with the proven
Roger Method™

Embrace the process. Reach the goal.

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A wide, straight road stretches towards a horizon under a dramatic, cloudy sky. A large white arrow is painted on the road, pointing towards the horizon. The word "SUCCESS" is written in large, white, stylized letters across the bottom of the road. The overall scene is a metaphor for achieving a goal.

Goal (noun)

“The end towards which effort is directed”

SUCCESS

Self Assessment



What is important to you in Life and in your Career?

- Take a **Self Assessment**
- Be **passionate** about what you do

Setting Goals

- Short Term and Long Term Goals
- Must address **both** Personal and Professional goals

Benefits of Setting Goals

- Long Range Focus
- Short Term Action
- Basis of Evaluation
 - ◆ Avoid Trap – *Only* focusing on career Goals



Setting Goals

✓ ***Areas for Consideration***

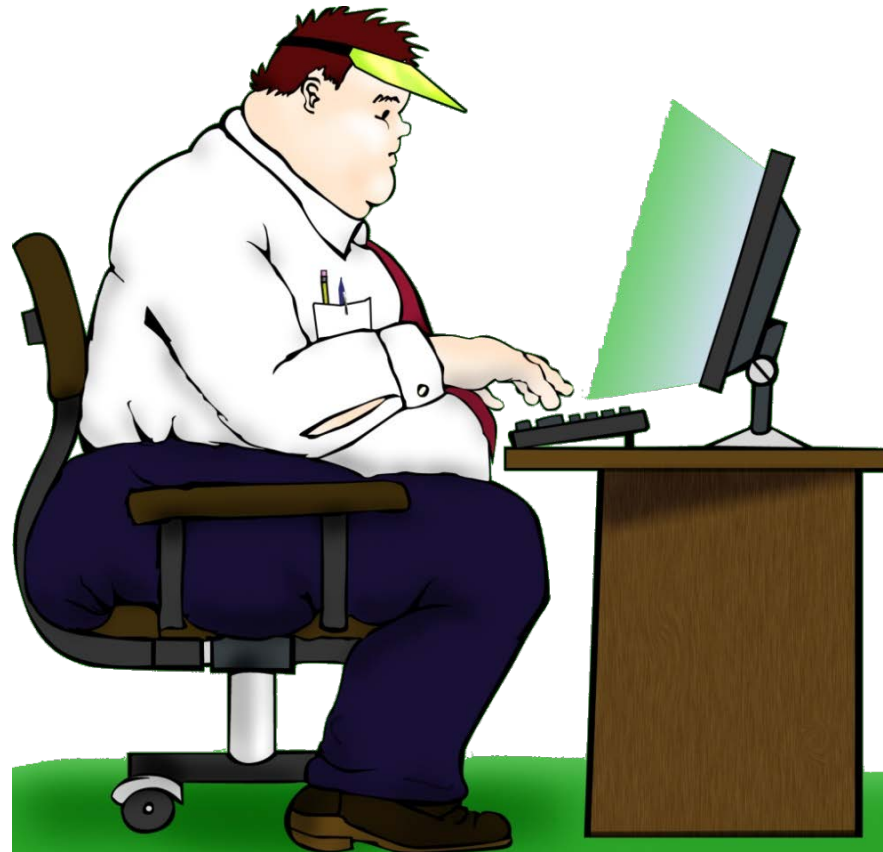
(Goals are not a pyramid)

✓ ***Must address both Professional and Personal goals*** (*Enjoy entire life*)

- Career vs. Job
- Financial
- Physical
- Mental
- Family
- Spiritual



Career vs. Job



FINANCIAL



PHYSICAL



MENTAL



FAMILY



SPIRITUAL



Goal Setting Procedures

(Life is NOT a beer commercial!)

- Reflection (5,10, 20 yrs from now)
- Crystallization (ID picture)
- Formalization (write them down)
- Evaluation (New Years Eve)
- Modification (time wasters)



How to Achieve Your Goals



- Develop an action plan
 - Goals without a plan are merely wishes!
- Periodically remind yourself of the goals
 - Progress Report
 - Evaluate Timetable
 - Re-read

Use of Time Savers

- **Calendars**
- **Workspace** (keep clean)
- **Technology** (Smartphone)
- **Assistance** (outsource)
- **Lists** (to-do)



#1 best opportunity to help you accomplish your goals:

NETWORK!

According to bnet.com,

80%

of people get their **jobs** based
on **connections**:

KNOWING SOMEONE WHO KNOWS SOMEONE

Networking

Making connections to further your career.



Staying Involved

- State Society Participation
 - Networking events, luncheons
- Mentoring
 - Attend Meet the Firms (MTF)
 - Firm Tours
 - Banquets
 - Give Presentations at local colleges
 - (careers)
- Teaching, VITA



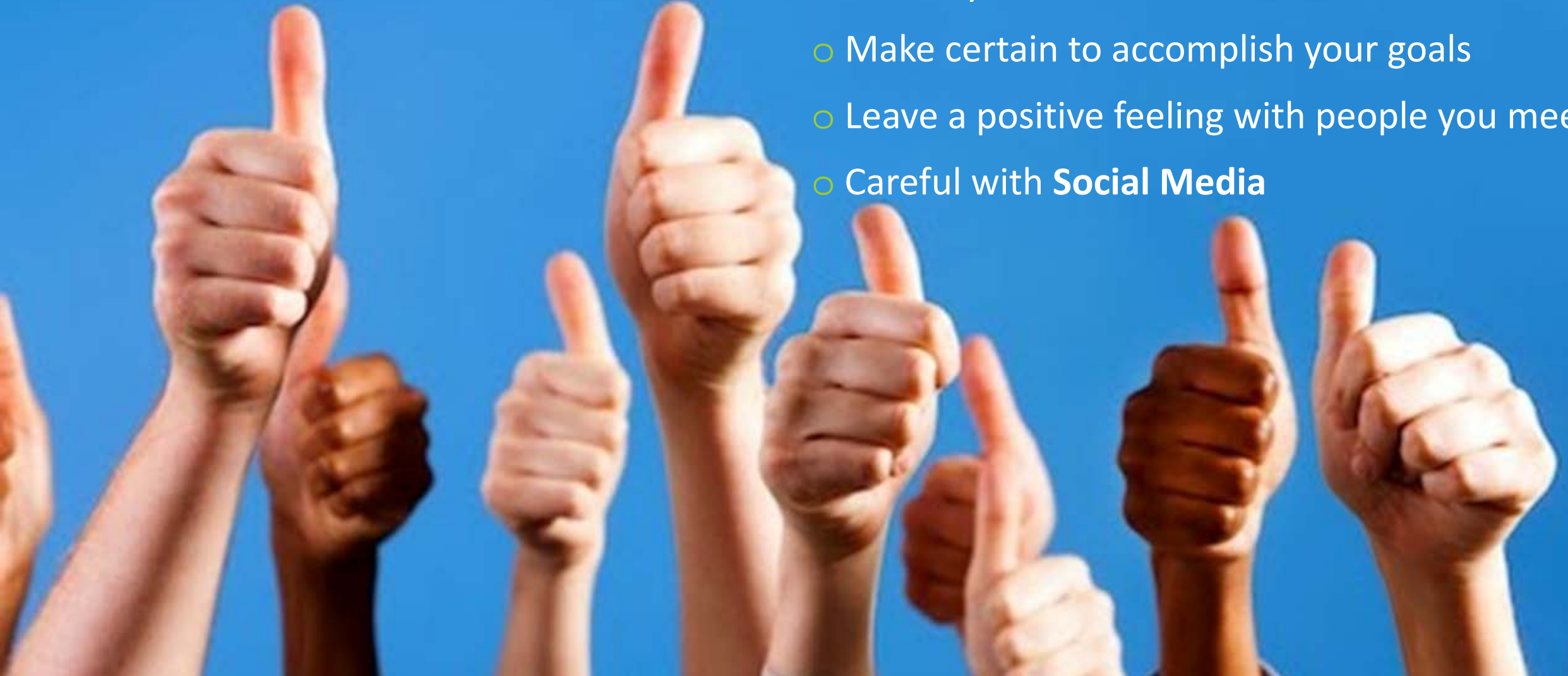
Increase Career Opportunities

- Active involvement in campus organizations
- Cultivating an instructor network
- Developing a network of members in the profession

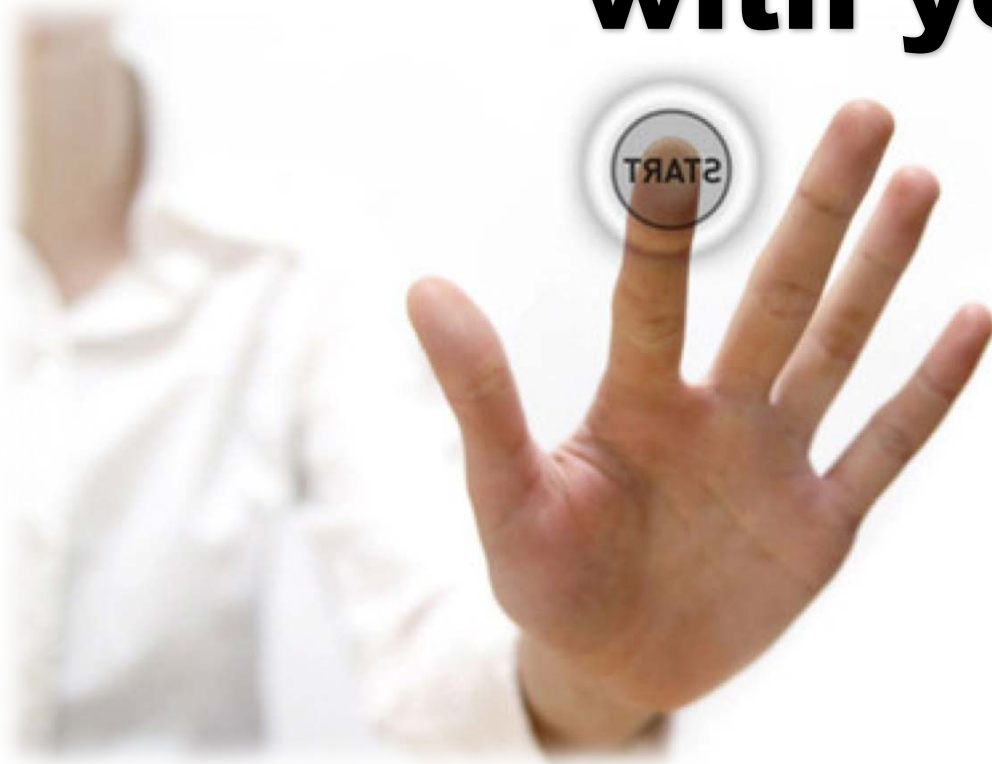


Effective Networking

- Make a good first impression
- Make eye contact
- Make certain to accomplish your goals
- Leave a positive feeling with people you meet
- Careful with **Social Media**



Work on self-starting with your CPA Exam Goals/Career



Getting your CPA License

- ***Pass the CPA Exam***
- ***Meet education and work requirements***
- ***Earn your License***
 - Open the door to promotions, raises, new career opportunities
 - Job security



Keep Your Options Open

Big 4

Public

Private

Government



Get Noticed & Make your Mark

- Bring new ideas to the table
- Take initiative
- Present solutions



Maximize your Growth Potential

- Highlight your **strengths** and work on your **weaknesses**
- Take on new challenges
- Become an invaluable asset!!



Claim what is Yours



- Don't be afraid to ask for merited raises or promotions
- Be strategic in planning your approach

Solicit Feedback Regularly

- Get honest feedback from colleagues, managers, and subordinates
- Use criticisms to your advantage



Continue Learning & Challenging Yourself

- Take on the responsibility of managing others
- Stay up on new advances in the field
- Take classes to learn new skill sets (CPE)
- Be open to change



Your Future is Yours to Create!

- Set Goals and Direction in your life
- Network and Follow your Career Choices
- Make Your Mark
 - Get noticed for great work
- Believe in yourself (Be selfish)
- Don't Limit yourself!!



Be SELFISH! Don't limit yourself!



ENJOY LIFE!



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Contact Us



“Thanks to your knowledge and awesome teaching abilities I was able to score very high on the exam...FARE 90, REG 92, AUD 94!”

– Scott E., Ernst & Young

