



Nov. 18, 2015

2015 Accounting MOVE Project

“Lightbulb Moments”

Highlights & Takeaways



# Welcome

Ericka Harney  
Executive Director, AFWA



Accounting & Financial Women's Alliance  
CONNECT • ADVANCE • LEAD

# Inspiring Action

*Darin Goehner, Partner  
Northwest Regional Tax Leader*

# Setting the Course

## Our Mission

To accelerate the firm's success in attracting, developing, retaining, and advancing talented women.

## Our Priorities

- Individual Impact
- Policies and Processes
- Renewed Focus
- Reputational Growth

## Our Goals

- Inclusion
- Leadership development
- Develop women leaders
- Thought leadership

# Making an Impact



~~Forum M~~

empower

Partner  
Accountability

# Innovating for Impact

## Forum W for Leaders Series

FORUM|W

MOSS ADAMS LLP  
network for women

### SPONSORSHIP 101

As sponsorship becomes engrained in our culture, we'll increase our ability to strengthen our talent pipeline, increase employee engagement, and demonstrate an even stronger commitment to the People Cornerstone.

#### The Sponsor's Role

As a sponsor, you'll play an influential role in talent development and advancement by going beyond giving advice and using your influence to advocate for your protégé. Each sponsor will have their own approach or style, but all great sponsors focus on the following common practices proven to accelerate career advancement.

- Understand a protégé's strengths, development areas, and long-term goals to advocate in an effective and strategic way.
- Raise a protégé's visibility within the firm and connect them to individuals in your network.
- Be vocal about their protégé's strengths, skills, and experiences in conversations with others.
- Be an advocate when opportunities arise, like stretch assignments or highly visible opportunities leveraging their current skills and while building the skills and experiences necessary for advancement.

A Harvard Business Review study asked managers, what they hoped for in a sponsor:

74%	41%	59%	49%
Honest feedback on how to narrow gaps in skills and experience	Be willing to defend me	Provide feedback on how to look and act as a leader	Help define career goals

Source: Harvard Business Review, The Relationship You Need to Get Right, Sylvia Ann Hewlett, Melinda Marshall, and Laura Sherbin

#### Mentors vs. Sponsors

Is mentoring the same as sponsorship? Although mentoring is an important aspect of career development, research shows mentoring doesn't necessarily lead to advancement. Here's why:

Mentor	A mentor informally or formally helps you navigate your career, providing guidance for career choices and decisions.
Who drives the relationship?	Mentee drives the relationship. The mentor is reactive and responsive to your needs.
Actions	Help determine possible career paths to meet specific career goals.
Sponsor	A sponsor is a senior leader or other person who uses strong influence to help you obtain high visibility assignments, promotions or jobs.
Who drives the relationship?	The sponsor drives the relationship, advocates for you in many settings, including behind closed doors.
Actions	Advocate for advancement and champion your work and potential with other leaders.

*"A coach talks to you, a mentor talks with you, and a sponsor talks about you."*

Source: Coaches, Mentors, and Sponsors: Understanding the Differences, Catalyst 2014

FORUM W | MOSS ADAMS FORUM FOR WOMEN | 1

FORUM|W

THE GROWTH SERIES

## Leadership Opportunity Framework

Gender Diversity? What is the current representation?

Have you considered someone outside your location/region/functional?

What steps did we take to identify candidates for this role?

Have we been cultivating someone for this role?

Have you consulted with someone outside your sphere to help make the decision?

# Our Lightbulb Moment

Presented by Risa Lavine, Chief of Staff

COHN  REZNICK  
ACCOUNTING • TAX • ADVISORY

# WomenCAN: A COLLABORATIVE ADVOCACY NETWORK FOR WOMEN

- **Our Mission:** Attract, Retain, and Advance women at CohnReznick and in the business community

- **The Business Case:** A gender-based diversity strategy has a permeating effect on our culture, leadership pipeline, and overall growth.





# LIGHTBULB MOMENT

- Advancing Women is a **Business Opportunity**; Not Just a **Business Challenge**

- Retaining and Advancing Women** is Critical to Our Success and Our Clients' Success



# IMPACT: EXECUTIVE WOMEN' S FORUM

- Expanding our Executive Women' s Forums nationally:
- Women-centric networking events** with female clients, prospects, and centers of influence/referral sources
- Aligning with **industry practices**



# RELEVANCE AND RESULTS



- **Business development** leads to women's development and advancement
- **More women leaders/partners give a voice** to that demographic and leads to better business decisions and more profitability
- **Providing a forum and the tools** for relationship selling skills increases women's comfort and confidence with business development
- **We are ultimately mindful** in the discussion and in our branding internally and externally



## Yeo & Yeo's Lightbulb Moment The Power of Social Media

Kimberlee Kelley  
*Director of Marketing*



# Yeo & Yeo's Lightbulb Moment

Share the value of [advancing women](#).



## Stories Captivate.

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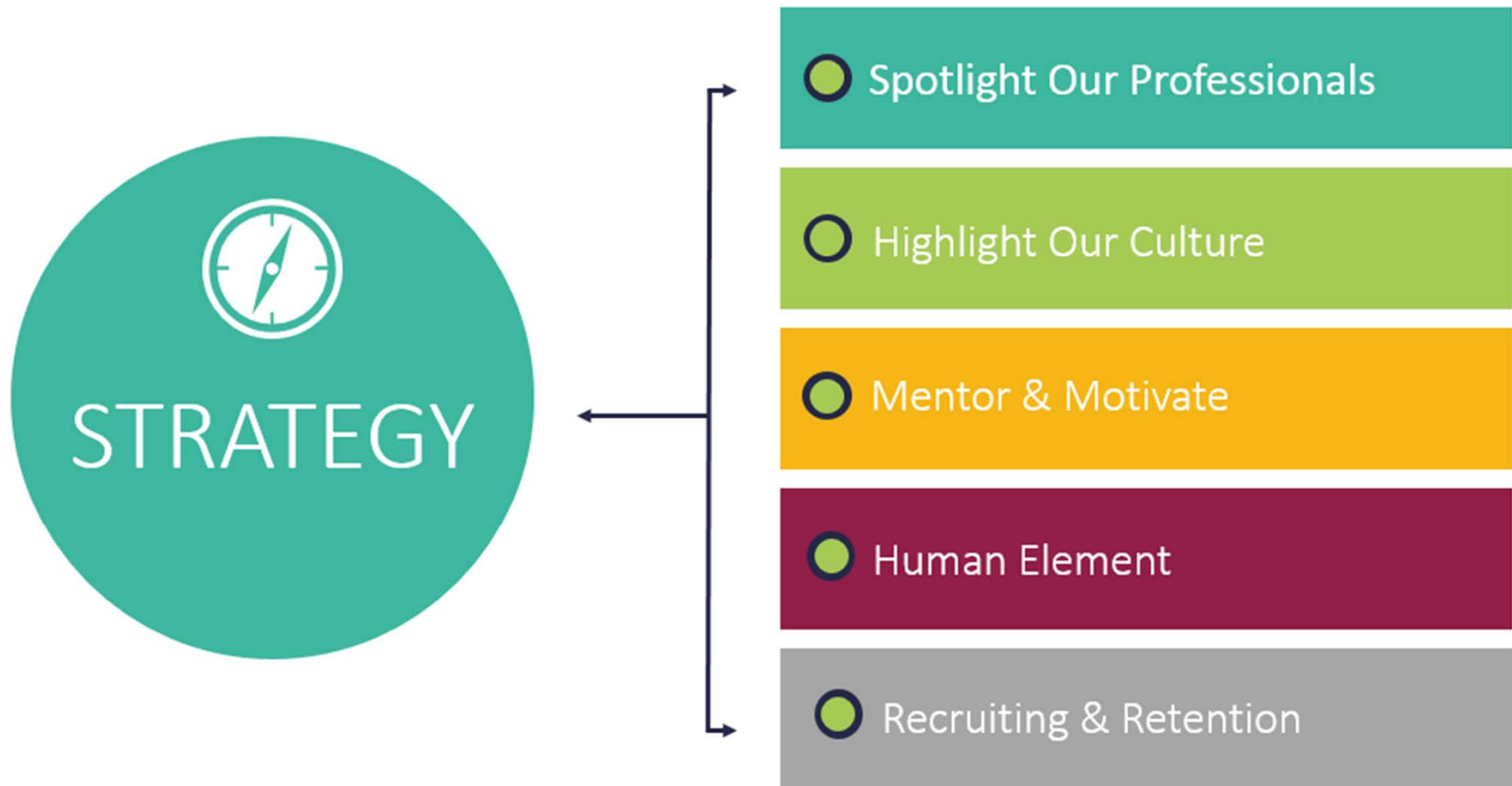
Connecting stories of the heart  
with our MOVE Achievement  
= *A Smart Campaign*





# The Opportunity

More than a [Social Media Campaign](#).





# Digital Strategy

Connecting the dots.



# MOVE Feature Project Scope

3 month campaign. 13 inspiring stories.

## 1 DEVELOP PLAN

- 13 week campaign to run through prime recruiting season
- Women leaders selected to profile
- Developed timeline of when each would publish

## 2 DEVELOP PROFILES

Created a questionnaire of seven questions and emailed to the 13 leaders offering the option to conduct via phone or in person

## 3 LAUNCH CAMPAIGN

Every Monday posted on website, social media channels, firm Intranet and emailed social shares to all firm staff

## 4 FOLLOW-UP

Sent a thank you to the leaders profiled and instructions to embed a PDF of their profile on their LinkedIn page; providing ongoing analytic updates and feedback

The image shows a screenshot of the Yeo & Yeo MOVE Questionnaire and a sample profile for Jamie Rivette. The questionnaire is titled "MOVE Questionnaire" and includes a thank you message for participation in Yeo & Yeo's celebration of being named to the MOVE Project Best Firms for Women List. It asks respondents to return the questionnaire and a photo by June 30, 2015. The questionnaire has four sections: 1. DESCRIBE YOURSELF, 2. DISCUSS YOUR CAREER WITH YEO & YEO, 3. DESCRIBE A TIME OR SITUATION WHERE YEO & YEO'S WORK-LIFE FLEXIBILITY HAS IMPACTED YOU, and 4. WHAT CHALLENGES HAVE YOU FACED AS A WOMAN IN ACCOUNTING AND HOW HAVE YOU OVERCOME THEM? Below the questionnaire is a sample profile for Jamie Rivette, titled "2015 Best Firm MOVE PROJECT". The profile includes a photo of Jamie Rivette and her family, a quote from Francis of Assisi, and contact information for Jamie Rivette, CPA, Principal, Government Services Group Leader. The profile also includes a "Contact Me" button.

**YEO & YEO**  
CFAs & BUSINESS CONSULTANTS

**MOVE Questionnaire**

Thank you for your participation in Yeo & Yeo's celebration of being named to the MOVE Project Best Firms for Women List.

Please return this questionnaire and a photo by June 30, 2015.

1. DESCRIBE YOURSELF.  
*This may include- family, hobbies, interests, achievements, education, goals, passions, community service.*

2. DISCUSS YOUR CAREER WITH YEO & YEO.  
*This may include- Why you chose a career in accounting, what made you choose Yeo & Yeo, what you specialize in and what you love about your career.*

3. DESCRIBE A TIME OR SITUATION WHERE YEO & YEO'S WORK-LIFE FLEXIBILITY HAS IMPACTED YOU.

4. WHAT CHALLENGES HAVE YOU FACED AS A WOMAN IN ACCOUNTING AND HOW HAVE YOU OVERCOME THEM?

↓

**2015 Best Firm**  
**MOVE**  
PROJECT

**Jamie Rivette**  
Women Leaders in Accounting

*"Start by doing WHAT'S NECESSARY; then do WHAT'S POSSIBLE; and suddenly you are doing THE IMPOSSIBLE."  
- Francis of Assisi*

**JAMIE RIVETTE, CPA**  
Principal  
Government Services Group Leader  
[Contact Me](#)

**Meet Jamie**  
My husband and I live in Hemlock and we have two beautiful children – Alyssa (9) and Dominic (7). I enjoy spending time with my family, camping, running and traveling. Alyssa participates in a competitive dance team, and Dominic likes to play soccer and T-ball. I am currently the treasurer of the Hemlock Board of Education and treasurer of the Hemlock/Ling Elementary PTO.

Tell us about your career with Yeo & Yeo





# The Results





## 2015 Results: Highlights

- **Money**
- **Opportunity**
- **Vital supports for  
work-life**
- **Entrepreneurship**



## 2015 Results: Highlights

*Women on CPA firm  
management committees*

**2015: 23%**

**2011: 17%**



## 2015 Results: Highlights

*Women senior managers*

**2015: 47%**

**2011: 38%**



## 2015 Results: Highlights

*MOVE Project 2015*

*Women employees*

- 2015: 51%
- 2011: 51%

*AICPA, 2015*

*Women new grads:*

- 2015: 47%
- 2010: 50%
- 2006: 52%



# 2015 Results: Highlights

## M trends

- **47%:** pay equity audits of base pay + performance data
- **25%:** pay equity audits by gender & race



# 2015 Results: Highlights

## 0 trends

- **84%:** mentoring
- **66%:** coaching for mentors
- **63%:** career coaching – staff to manager



# 2015 Results: Highlights

## V trends

### *Flexwork*

- **59%:** Formal practice
- **81%:** Informal practice
- **53%:** By dept., w/ manager approval (68% in 2014)





## 2015 Results: Highlights

### E trends

- **47%:** external marketing tied to entrepreneurship (36% in 2014)
- **56%:** alumni networks (46% in 2014)



2016 theme

**Sponsorship:**  
**Stepping Up Success**



Q&A



**Callie Thomas**

Assistant Association Administrator  
American Woman's Society of CPAs

- 2016 MOVE Project survey open now through Dec. 22, 2015
- Enroll your firm at  
<http://wilson-taylorassoc.com/move/accounting>
- Tell us your executive sponsorship stories!