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Specialists in the Placement of Accounting & Finance Professionals
Direct Hire, Temporary and Temp to Hire Placement
"Our People are our Greatest Asset!"

Mentoring – Developmental Activities

By Alison Sfreddo

The mentor plays a key role in designing developmental learning experiences for the mentee. Often, though, a mentor's first question is, "How do I design a developmental activity?" The first step is to identify a need that offers the greatest opportunity for improvement and focus an assignment to address this need. Secondly, the activity should be one in which the mentee will learn without becoming discouraged or feel overwhelmed and where the learning environment will be "safe." Finally, ensuring an effective means of feedback from the activity is vital to achieving and solidifying the developmental goal of the activity. The following are a few ideas for developmental activities within five specific realms of employee experience.

Communication

- Style – Encourage mentees to solicit feedback after meetings from trusted colleagues as to how their communication style is perceived by others.

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How Do You Embrace Change?

Embracing Change And Managing A Smooth Transition

Everyone of us at one time or another has had a moment in our careers (or our lives for that matter) when we have asked ourselves the uncomfortable question, "How much longer can I continue to do what I am doing?" It is an uncomfortable question as it begins the process of moving out of our current comfort zone to a place in our lives that appears to be of great uncertainty.

Change of any kind or at any level can be a daunting process, but a necessary

one for personal and professional growth and development. Although it is often times easier to just "stay put," it is far more rewarding to move forward. Dr. William Bridges, author of *Managing Change and Transition*, outlines the change process by illustrating the three phases of change as well as what to expect from these phases and what is needed to successfully move through them:

Phase 1: The first phase of change is what Bridges' calls "ending." This is basically the recognition that the time has come for us to move on. It is the process of letting go of old patterns and habits before embracing the future.

Phase 2: The second phase of the process is that "transition zone." People report a feeling of being disconnected from the past, yet emotionally not connected to the present. This phase can offer a great opportunity for creativity if anxiety and fears are readily managed.

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- Listening Skills – Practice listening skills by having the mentee listen to someone explain an issue and then recite the major points of the argument to that person in order to see if they have captured the main purpose of the discussion.
- Writing – Have the mentee draft an internal memorandum and evaluate the writing style and tone in terms of company expectations and effectiveness of the communiqué. Provide feedback.
- Presentations/Briefing – Provide feedback after a presentation has been delivered. Ask for feedback from others who also received the brief.



Leadership

- Problem Solving – Encourage the mentee to tackle a problem within the organization from an analytical perspective incorporating the views of the major stakeholders and create a plan to address the problem.
- A Fresh Look – Have the mentee walk through the office space with “*new eyes*,” asking themselves if the environment reflects the culture and values that are important to him/her and then discussing these new insights with you.
- Unwritten Rules – Have the mentee speak with at least three senior managers about what they consider to be the organization’s “unwritten” rules and why they are important.

Teamwork/Team-Building

- Information Sharing – Have your mentee set aside a specific time monthly (or more often as required) to share new knowledge and information with his/her team members.
- Team Orientation – Encourage the mentee to solicit feedback from team members in terms of how team oriented he/she is. Determine if team members feel that the mentee pushes his own ideas rather than listening to the collective voice of the group or that he considers or fails to consider how decisions will affect the other team members.

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- Membership – Have the mentee join an “*ad hoc*” team or committee assignment as a team member and monitor his/her behavior within that role.
- Collaboration – Have the mentee serve on a project requiring collaboration with a variety of different perspectives and disciplines to see what barriers he/she may face.

Technical Expertise

- Shadow an Expert – Ask the mentee to follow an expert for a day and to prepare a paper on what was learned from this experience.
- Stretch Goals – Encourage the mentee to take a project outside their normal area of expertise or comfort zone.
- Networking - Encourage the mentee to foster a network of situational “*technical*” mentors by spending time with them on a monthly basis.
- Professional Conferences – Mentees should attend at least one professional conference per year with the goal of strengthening their technical skills in at least one area.

Time Management

- Priorities – The mentee should discuss his/her team’s top ten priorities with a senior manager.
- Goals and Deadlines – Encourage the mentee to maintain a work journal, chronicling their deadlines and daily work goals to identify time wasters, times when they are most and least productive, and means of controlling the use of their time.
- The Power of Experience – Have the mentee interview three key executives who balance their time with ease to glean insight into the techniques and processes for doing so.
- Efficiency – Have someone visit the mentee’s office and provide constructive feedback on its efficiency.



These are just a few of the myriad developmental activities that you can recommend to your mentee in order to help them become a more valuable asset for the organization. Use these as guidelines to create your own developmental activities that focus on the critical aspects of employee success. Most of all, try to make the activities interesting, non-confrontational, and even fun whenever possible.

By Allison Sfredo, Reprint granted by The Mentoring Connection

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Phase 3: And lastly, the “*new beginning*” phase is one of action as we have finally let go of old patterns and have made a commitment to the life style or change that will accommodate new opportunities.

One of the things we forget to consider when mentoring or coaching someone is the human tendency to resist change. For example, when a mentee enters into a mentoring relationship they have made a decision to make potential changes and ultimate transitions in their careers. Sometimes a mentor will experience this resistance first hand. It is helpful to know in advance what to be prepared for and how to help a peer or colleague move forward or get “*unstuck*.”



The following are a few simple ways in which to successfully challenge others to embrace change and make that exciting transition:

- ◆ Construct a personal “**Vision Board.**” This is the fun part. Create a list of those goals and objectives that you would really like to see yourself actually accomplishing in the next few years. Then add those dreams you have been harboring for years. By actually putting them on to paper, they have now been established as an actual goal. By formally acknowledging those grand ideas, you are setting into motion where it is you really want to go.
- ◆ ‘**To Thy Known Self be True**’. To successfully manage change, we must first know how we, with our different personalities and behaviors, react to change. For example, are you the type of person who embraces change and will you tend to get bored if things stay the same? Do you need time to prepare for change? Do you react positively or negatively to unexpected changes? By analyzing our own strengths and shortcomings, we are better equipped to embrace change and make smooth transitions.
- ◆ **Seek new Role Models.** You can begin making corrections to your current behaviors and lifestyles by modeling your reactions and patterns to those you most admire and whose positions and lifestyles you hope to someday achieve. Review again your goals and observe those who are currently living out your very goals, dreams and objectives. Their behaviors and choices have obviously gotten them to where they are today.

The key to successful transition is constant involvement of our goals, behaviors and dreams. Our personal and professional journeys are just that – a passage from one opportunity or success to another. Have a great journey!

Reprint permission by Jennifer C. Selland, CPBA, CPVA, CAIA, Trimetrix™, Well-Run Concepts

It takes a lot of courage to release the familiar and seemingly secure, to embrace the new. But there is no real security in what is no longer meaningful. There is more security in the adventurous and exciting, for in movement there is life, and in change there is power.

– Alan Cohen



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The U.S. Financial Literacy and Education Commission established MyMoney.gov to provide financial education resources for all Americans.

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Keeping Good Records

You can avoid headaches at tax time by keeping track of your receipts and other records throughout the year. Good recordkeeping will help you remember the various transactions you made during the year, which in turn may make filing your return a less taxing experience.

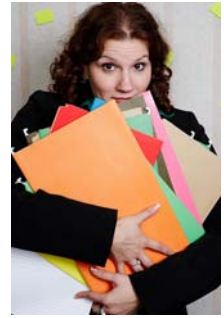
Records help you document the deductions you've claimed on your return. You'll need this documentation should the IRS select your return for examination. Normally, tax records should be kept for three years, but some documents — such as records relating to a home purchase or sale, stock transactions, IRA and business or rental property — should be kept longer.

In most cases, the IRS does not require you to keep records in any special manner. Generally speaking, however, you should keep any and all documents that may have an impact on your federal tax return:

Bills, Credit card and other receipts, Invoices, Mileage logs, Canceled, imaged or substitute checks or any other proof of payment, and any other records to support deductions or credits you claim on your return.

Good recordkeeping throughout the year saves you time and effort at tax time when organizing and completing your return. If you hire a paid professional to complete your return, the records you have kept will assist the preparer in quickly and accurately completing your return.

For more information on what kinds of records to keep, see IRS Publication 552, Recordkeeping for Individuals, which is available on IRS.gov.



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