

Navigating the future to a CAE role **Houston IIA Annual Seminar**

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Warning/Disclaimer

- No guarantee on navigating to be a CAE
- Requires getting out of your comfort zone
- Possibly not your CAE
 - CAE's are not created equally
 - CAE's are not perfect
- Your career is a journey
- Becoming a CAE should not be your life's purpose



#1 – Integrity and Ethics

- Principles vs rules vs law
- Live in a glass house
- Admit when you are wrong
- Respect everyone, even disrespectful people
- Humility and compassion
- No hidden agenda
- Takes years to build and seconds to lose
 - Start early in life/career
 - Once gone (near) impossible to reverse



Benefit

- Trust
- Creditability
- Respect
- Objectivity

#2 – Balance/Off Balance

- Flexibility/Adaptability
 - Priorities
 - Pick your battles
 - Multitasking
- Political Savvy
 - Know the system and how it works
 - Balance between
 - Management
 - Sr. management
 - Audit committee
- Tolerance of ambiguity

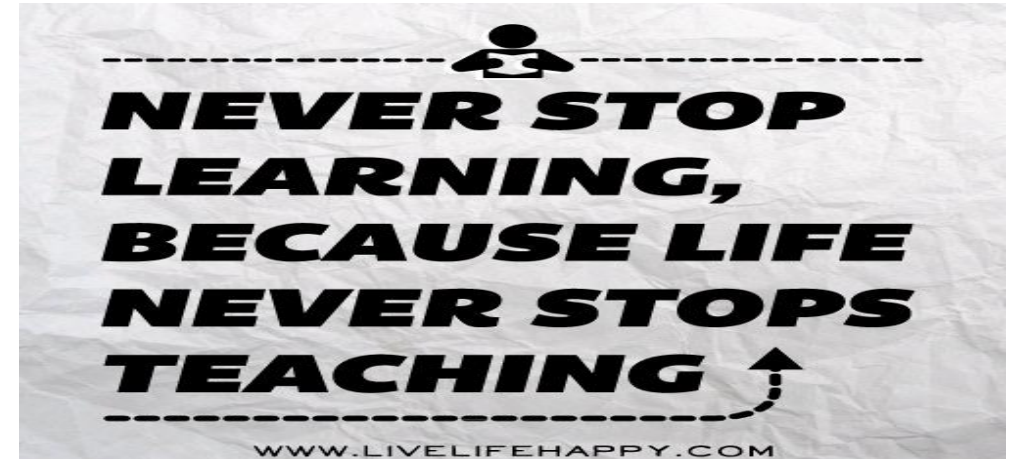


Benefit

- Effectiveness
- Success
- Less stress

#3 – Continuous Learning

- Certifications
- Don't have to be sick to get better
- Focus areas
 - Your specialty area
 - Best practices
 - Technology
 - Communication skills
 - Leadership and people skills
- Learn from mistakes

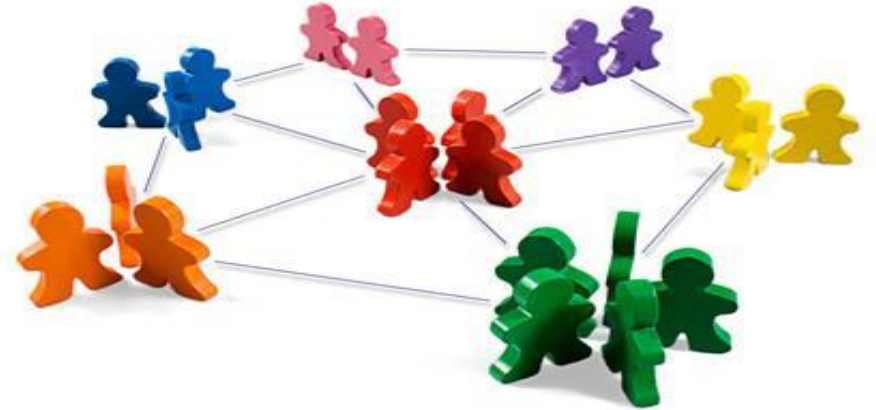


Benefit

- Know best practices
- Trend knowledge
- Successful ideas
- Role model

#4 - Relationships

- Build and maintain (networking acumen)
- Positive caring approach 100% of time
- Not about you
 - Not always your ideas
 - Listen more than talk
- Take time for team and others
 - All levels in company
- Stand your ground (politely)



Benefit

- Get things done
- Power of many
- Sell/support ideas
- Sources for help

#5 – Change Agent/Problem Solver

- Not the police – no gotcha
- Be comfortable with change
- Positive focus
 - Risk mitigation
 - Business improvement (continuous)
- Timing is key
- Win support
- Collaborative
- Focus on end result



Benefit

- Acceptance
- Go to person
- Initiative success

#6 - Big Picture

- Visionary
- Don't get lost in details
- Company focus
- Strategic thinker/partner
- Determine what is missing in the picture
- Risk taking vs risk adverse



Benefit

- Upward mobility
- Respect
- Initiative success
- Contribute to business wins

#7 - Power of Many

- Takes a team
 - Coach (leader not manager)
 - Delegate
 - Motivate
 - Reward
- Adjust your style
- Not all about you
 - You can't do it all
 - You don't know everything
 - Open to new/different ideas (no bias)
- Ask don't tell (no barking orders)



Benefit

- Get more done
- Higher results
- More victory/wins
- Motivate others

#8 – Business Acumen

- Broad experience
 - Audit
 - Finance
 - Operations
- Expertise in one area
- Get out of comfort zone to grow and learn
- Business acumen
 - How company makes money
 - End to end processes
 - Company's risks
 - Governance
 - International cultural business realities/practices

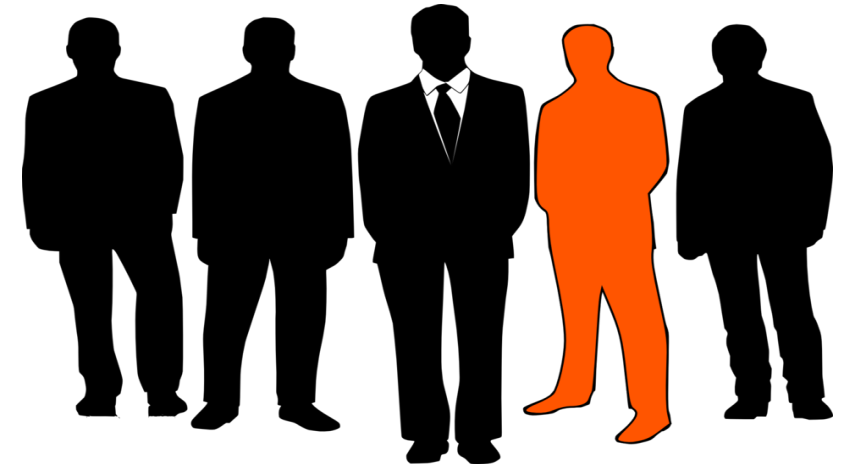


Benefit

- Acceptance
- Seat at the table
- Advise and recommend
- Assess more risks

#9 – Executive Presence

- Look the part and more
- Leader vs manager
- Actions speak louder than words
- Bring solutions not just problems
- Results focus, not tasks
- Think like a owner, CEO and/or board member
 - What questions will they ask?
 - What do they need to know?
 - What actions do they need to take/direct?
- Respectful humor

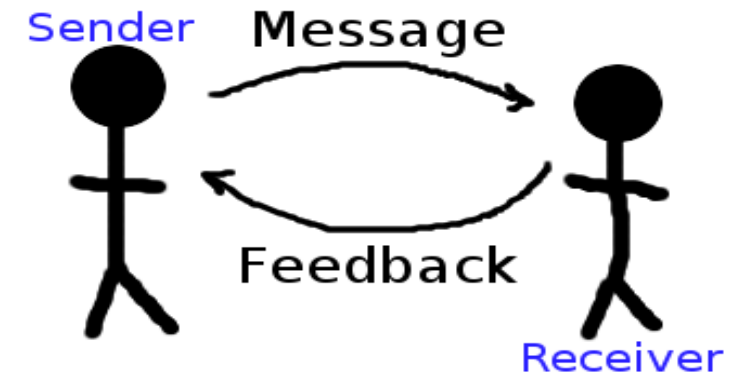


Benefit

- Seen as a leader
- Seat at the table
- Acceptance
- Respect

#10 - Communication

- Spoken, written and presentations
- Positive and inspirational
- Two way not one way
- Speak up not out
- Know your audience
 - Concise/crisp vs detailed
 - Anticipate questions – deliver upfront
- Key messages vs details
 - Focus on your message
 - Be strategic with your time
 - Thoughtful pre-read materials



Benefit

- Acceptance
- Respect
- Sell ideas
- Initiative success

Homework

- Skill/trait gap assessment
- Training/development program
 - Action plans
 - Target dates
 - Action owner (you)
- Practice, practice and practice



Benefit

- Career advancement
- Career success
- On track to be a CAE

Questions

