

# *Are we having fun yet?*

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Organizational issues that  
impact performance





# Today's Presentation

## Is Your Organization Fun?

*Exercise 1: Functional –vs- Dysfunctional*

## The Advantage of Being a Financial Professional

## Emotional Intelligence (EQ)

## The Four Question Matrix

*Exercise 2: The New Team Member*

## Reflections





# Quick show of hands...

- ▶ Audit?
- ▶ Accounting?
- ▶ Budget?
- ▶ Contracts/Purchasing?
- ▶ Finance?
- ▶ HR?
- ▶ IT?
- ▶ Operations?



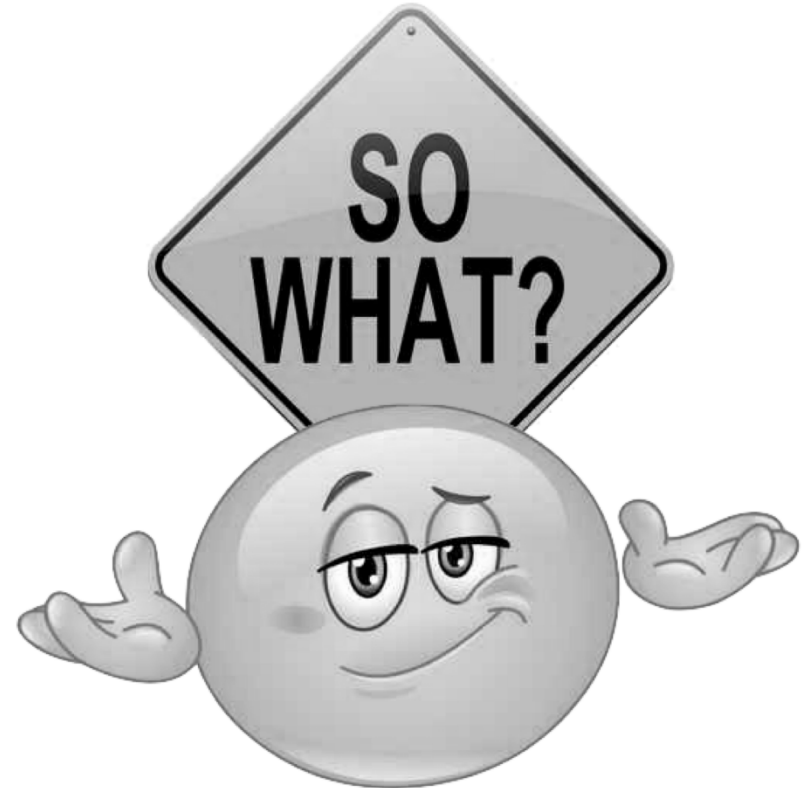


# Today's Presentation

HOW DOES IT APPLY TO ME?



Throughout today's presentation we will be interested in **your perspectives** about how these concepts **apply to you** as a fiduciary, auditor or financial manager.





# Today's Presentation

IS YOUR ORGANIZATION FUN?



How many of you have fun at work?

What makes an organization fun?

Is “fun” a legitimate corporate and/or organizational value?





# Fun as a Value

SOUTHWEST AIRLINES



## Warrior Spirit

Work Hard; Desire to the best; Be courageous; Display a sense of urgency; Persevere; Innovate

## Servant's Heart

Follow the Golden Rule; Adhere to the basic principles; Treat others with respect; Put others first; Be egalitarian; Demonstrate proactive customer service; Embrace the SWA Family

## Fun-LUVing Attitude

HAVE FUN; Don't take yourself too seriously; Maintain perspective (balance); Celebrate successes; Enjoy your work; Be a passionate team player



# Fun as a Value

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- » Deliver WOW through service
- » Embrace and drive change
- » Create fun and a little weirdness
- » Be adventurous, creative, and open-minded
- » Pursue growth and learning
- » Build open and honest relationships with communication
- » Build a positive team and family spirit
- » Do more with less
- » Be passionate and determined
- » Be humble



# The Fun Organization

HOW DO WE GET THERE?



Positive morale and fun are the **by-products** of a functional, collaborative and positive culture.



Effective organizations are almost always maintained by **people who enjoy what they do.**



# Exercise 1

## ORGANIZATIONAL HEALTH



▶ Here are some aspects of organizational health:

- » Fun
- » Morale
- » Teamwork
- » Communication
- » Ethics
- » Professional Development



▶ We are going to divide the room into groups and think about two questions:

1. What is working well in your organization? (i.e. what's functional?)
2. What is a challenge in your organization? (i.e. what's dysfunctional?)



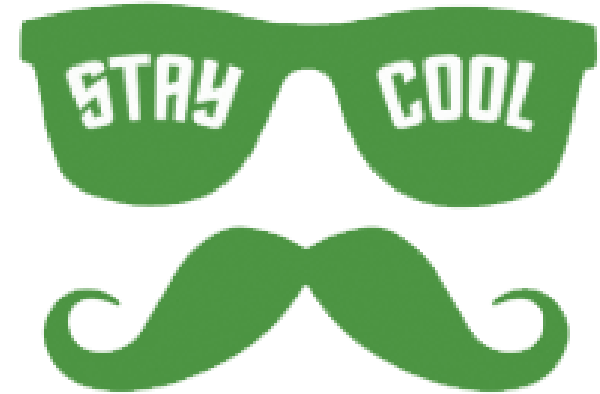
▶ Facilitated conversation

Please be creative, insightful and generally awesome!



## The coolest thing about being in finance...

- ▶ You get the privilege of working across — and understanding — every part of your organization.
- ▶ Your job is to engage with a variety of people and make sure they have the resources they need and protect them from risk!





# A Unique Perspective

YOU CAN'T BEAT THE VIEW FROM HERE



We see, hear, observe and inherently learn about all parts of an organization.

And when we are at our best...then we recommend ways to make it better!

(And share best practices we see across teams).





# A Unique Perspective

HOW TO MAKE THE MOST OF IT



Do we always make the most of the inherent advantages that allow us to project influence across an organization?



## BEING THE BEST WE CAN BE

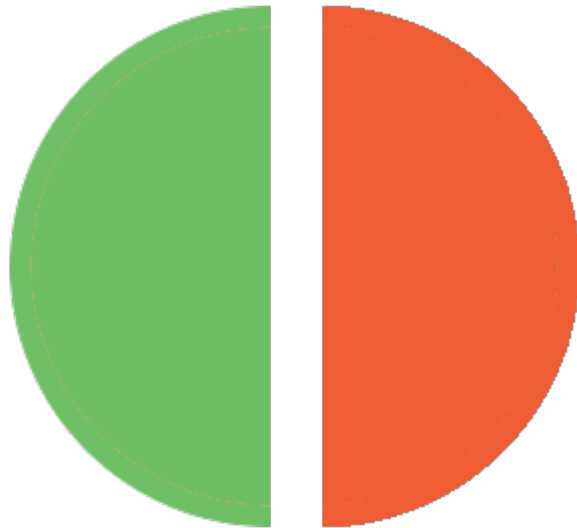
- » Getting to the point where you **enjoy** what you do (the “fun” part) and are **effective** at what you do relies on **competence**
- » We enjoy activities at which we are competent
- » Competence in auditing comes from **knowledge**, **experience** and continued **study** ...and occasionally a great CPE session ☺



# But That's Not All...

KNOWING IS HALF THE BATTLE

## The Battle



■ Knowing ■ Other Things

Our financial competence is only half the battle.

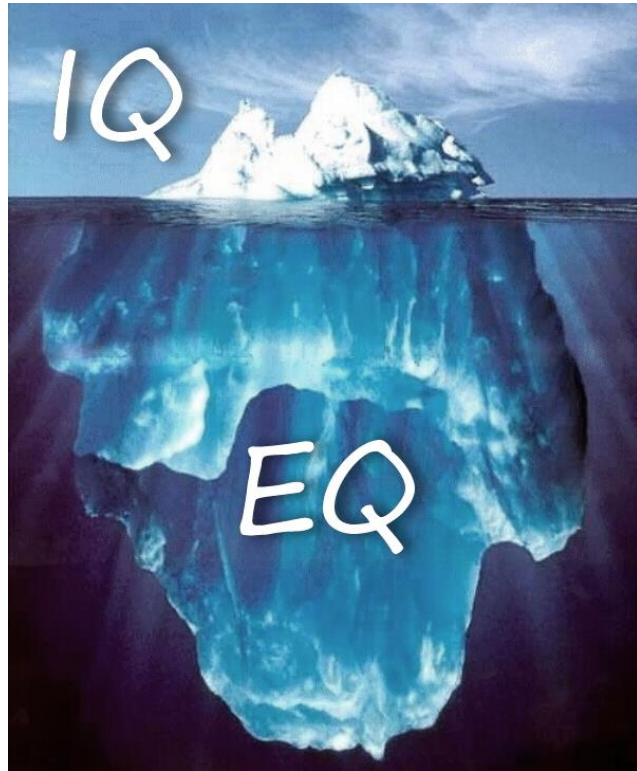
Discerning the difference between *functional* and *dysfunctional* organizations requires more than methodology and technical expertise ....

It also requires an understanding of *Emotional Intelligence*, both individual and collective.



# Emotional Intelligence (EQ)

DEVELOPING YOUR DEEPER SKILLS



What is  
Emotional  
Intelligence ?

*An individual's  
ability to recognize,  
understand, and  
harness his or her own  
feelings and the feelings  
of others.*



# Emotional Intelligence (EQ)

KEY ASPECTS



plus...

...understanding the gaps in your own emotional intelligence.



# Emotional Intelligence (EQ)

UNDERSTANDING ORGANIZATIONAL EQ



## How do you determine the EQ of an organization?

- ▶ How do people treat each other?
  - » Are they socially aware?
  - » Self-regulated?
  - » Collaborative?
  - » Unselfish?
- ▶ Do you have a motivated organization?
- ▶ How does this impact your work?





# EQ in Action

## ADDING TO YOUR MANAGEMENT TOOLKIT



Beyond any particular division or function, as you observe your organization, you are also learning the characteristics of **sub-groups** within the organization.

The **combination** of those sub-groups makes up the **culture** of an organization.



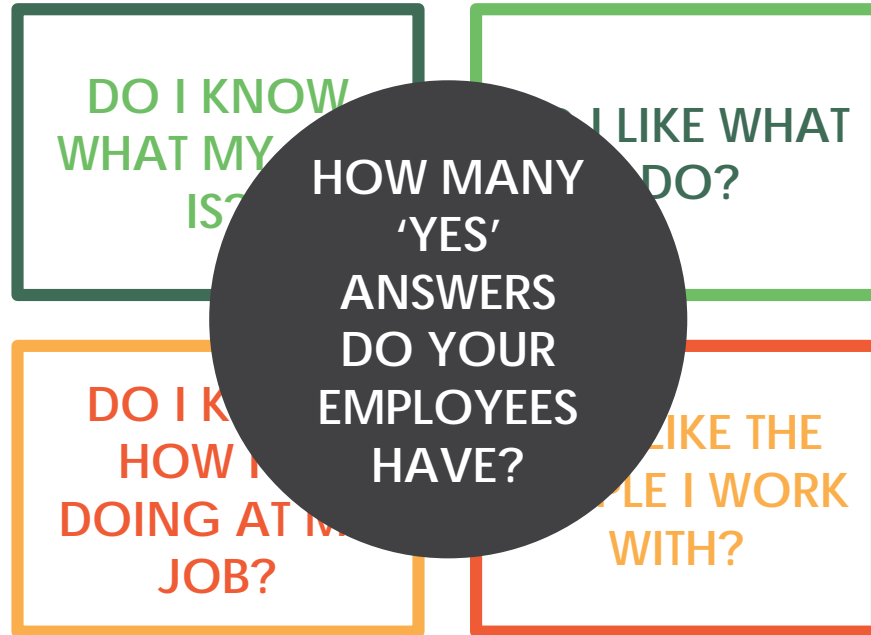
You can use EQ to enhance your understanding of the organization and enhance your own skills.

**BUT...HOW?**



# The Four Question Matrix

LEVERAGING EQ TO UNDERSTAND RISK





# The Four Question Matrix

LEVERAGING EQ TO UNDERSTAND RISK



Across divisions, departments and functions through an organization, the answers to these questions are *observable criteria*.

AND...each "no" answer increases risk.

HOW MANY  
'YES'  
ANSWERS  
DO YOUR  
EMPLOYEES  
HAVE?



# Exercise 2

## INTERPERSONAL RELATIONSHIPS

**Scenario:** A new contractor joined your team a few weeks ago. You are very impressed with her strong work ethic and conscientiousness. She seems to be relentless about taking on more work as tasks are completed. However, she takes little time to chat with teammates or bond with them on a social level, and in fact some peers feel she is rude and abrupt.



- ▶ How would you describe the contractor's emotional intelligence?
- ▶ What would be your approach in your interactions with the contractor?



# Reflections

## WHAT ARE THE KEY TAKEAWAYS?

- ▶ Think of the individuals you work with: what is their emotional intelligence profile?
- ▶ What EQ traits do you look for when recruiting and hiring members of your team?
- ▶ What are the gaps in your own EQ? How can you improve them?
- ▶ How does EQ make you a more effective professional?







Thanks for joining us!

And remember...

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have fun.