



## Leveraging Your Leadership

Peter Margaritis  
*Business Learning Institute Provider*

*Presented to  
Maryland Government Finance Officers  
Association  
Ocean City, Maryland  
June 20, 2019*



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## INSTRUCTOR BIOGRAPHY

### **Peter Margaritis, CPA**

**Peter Margaritis, CPA is a keynote speaker, communication strategist, and improv virtuoso, Peter is the author of two books, *Improv Is No Joke: Using Improvisation to Create Positive Results in Leadership and in Life* and *Taking the Numb Out of Numbers: Explaining and Presenting Financial Information with Confidence and Clarity*.**

**Peter works with financial professionals to help change their mindset and believe that strong communication skills are the most effective way of delivering your technical knowledge and building strong business relationships.**

**The underlying premise in everything Peter does is the power of applied improvisation. He focuses his strategies using two powerful words, YES! AND, along with the concept of listening to understand. This strategy promotes a stronger connection with customers and clients leading to higher profits and higher retention of your employees.**

**Peter has delivered over 500 of keynote speeches and workshops in 38 states in the U.S. and across Canada and the Caribbean. His clients range from Fortune 500 companies, family owned business, national, regional & local public accounting firms, and national and state associations.**

**Peter earned his Bachelor's in Business Administration from the University of Kentucky, a Master's Degree in Accountancy from Case Western Reserve University and he is a licensed, non-practicing, CPA in Ohio. He has worked for companies such as Price Waterhouse, Victoria Secret Catalogue (not as a model), two large banking institutions and has managed restaurants in his day. Don't be surprised – he is Greek. He was also an assistant professor of accounting and taught in the MBA program at THE Ohio Dominican University in Columbus, OH.**

**Peter is also a blogger, writer, humorist and a podcaster. His podcast, *Change Your Mindset* can be found on his website, along with iTunes, Stitcher and Google Play. You can visit his website ([petermargaritis.com](http://petermargaritis.com)) to watch his video's, read his promotional resources which include a variety of magazine articles, along with his weekly blog.**

**Peter lives in Westerville, OH with his wife, 17-year-old son, and two Labrador retrievers. His passion is his family and improvisation, along with a love of humor, and at times he performs both improv and stand-up comedy.**



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Tips and Techniques to Building a Stronger Professional Network

Value of Collaboration - The Art of Relationship Management

# Leveraging Your Leadership



Presented by: Peter A. Margaritis, CSP, c.p.a.  
June 20, 2019



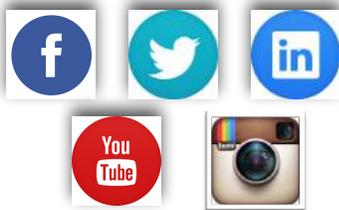
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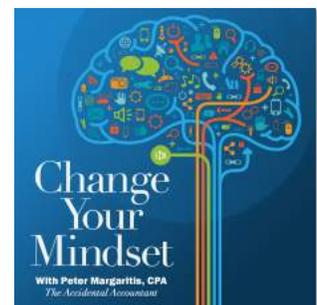
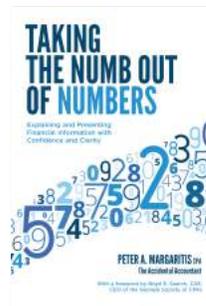
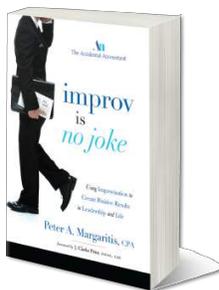
**Peter A. Margaritis, CSP, c.p.a.**  
**“The Accidental Accountant”™**

**Author • Blogger • Educator • Podcaster • Speaker • Humorist**



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- 58% of managers said they didn't receive any management training.
- 89% of bosses believe employees quit because they want more money. Only 12% leave for more money
- 58% of people say they trust strangers more than their own boss.
- 79% of people who quit their jobs because of 'lack of appreciation'
- 53% of Americans are currently unhappy at work

## Communicating in the Workplace



1. Communicating in the workplace
2. Leadership from a slightly different perspective



1. Communication is easy
2. My audience should understand me
3. If it's important to me it is important



**Q:** What challenges do you experience when communicating with others?

**S:** 1 minute



How many of you speak  
a foreign language?



**It is all about  
knowing and  
connecting with  
the audience**



# Pain Point

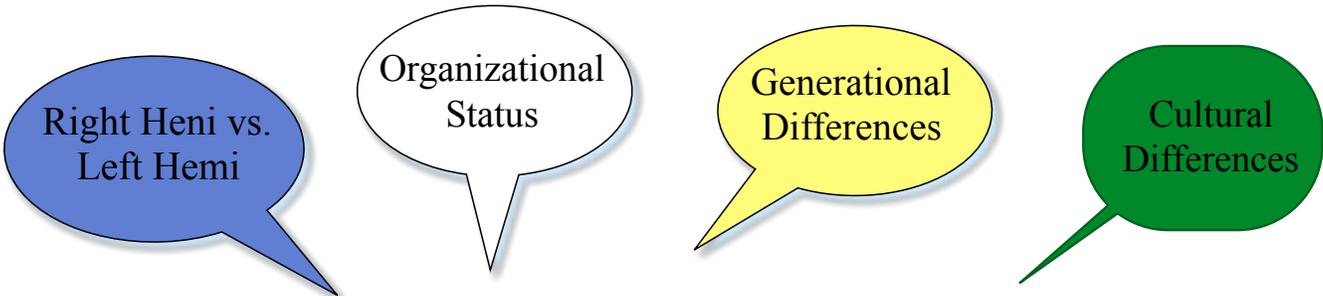


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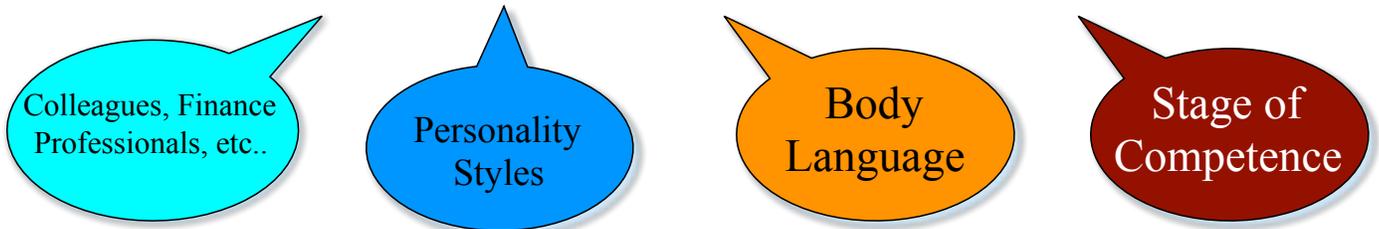
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# Financial Statement



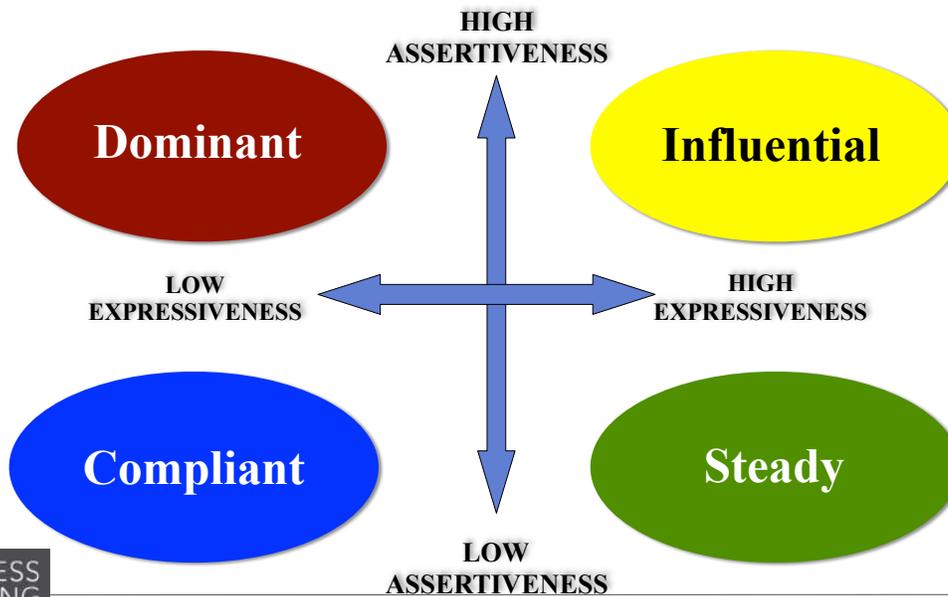
# Know Your Audience



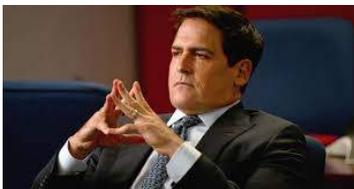
- Stage 1: They don't know - what they don't know - you know
- Stage 2: They don't know and they want to learn
- Stage 3: Getting closer to becoming a master
- Stage 4: Ultimate Master Yoda!



# D.I.S.C Personality Styles

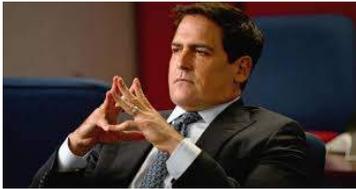


## Dominant



- **Just do it!**
- **Goal-oriented**
- **Competitive**
- **Decisive**
- **Control**
- **Poor listener**
- **Wasting time**
- **No small talk**

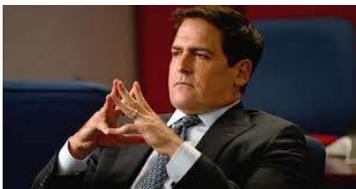
# Dominant @ Their Worst



- **Hot-tempered**
- **Demanding**
- **Know-it-all**
- **Bully**



# Connecting w/ the Dominant



- **Be direct,**
- **Be specific,**
- **Offer multiple solutions**



Video

## Influential



- **Don't confuse me with facts**
- **Optimistic**
- **Good communicator**
- **Persuasive**
- **Having fun**
- **Boring tasks**
- **Short attention span**
- **Avoids details**

# Influential @ Their Worst



- **Never makes a deadline**
- **Disorganized**
- **Can't stay focused**
- **Talks too much**



# Connecting w/ the Influential



- **Be enthusiastic,**
- **Be positive,**
- **Avoid details**



Video

## Steady



- Lets work together
- Friendly
- Reliable
- Supportive
- Diplomatic
- Harmony
- Conformist
- Conflict avoidance

# Steady @ Their Worst



- Indecisive
- Overwhelmed
- Whines
- Misses deadlines



# Connecting w/ the Steady



- Engage in small talk,
- Ask questions,
- Speak informally



# Compliant



- **Is this efficient?**
- **Accurate**
- **Problem-solving**
- **Disciplined**
- **To be correct**
- **Solving problems**
- **Picky**
- **Disorganization**

# Compliant @ Their Worst



- **Rigid**
- **Argumentative**
- **Critical**
- **Stubborn**

# Connecting w/ the Compliant

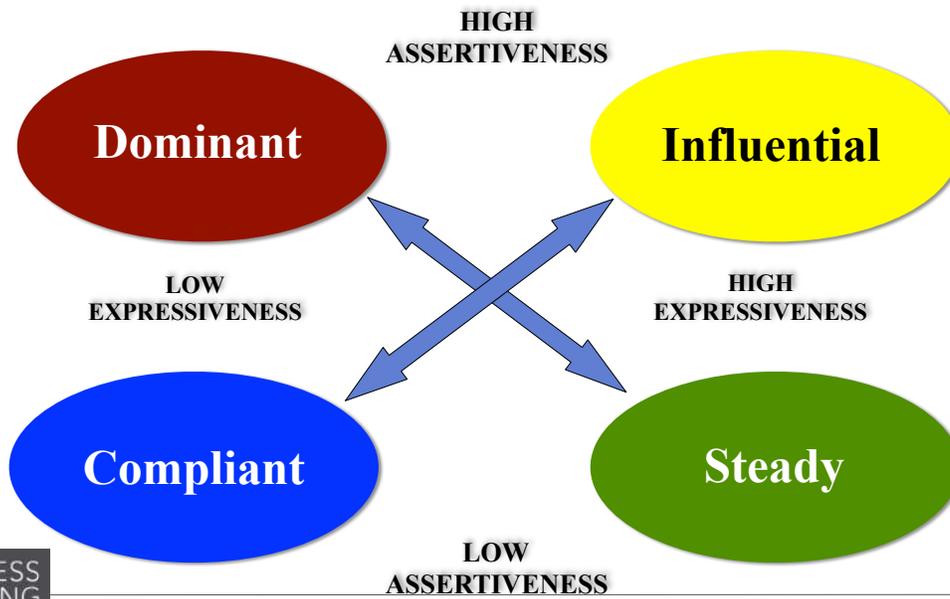


- **Focus on facts,**
- **Be organized,**
- **Be patient**

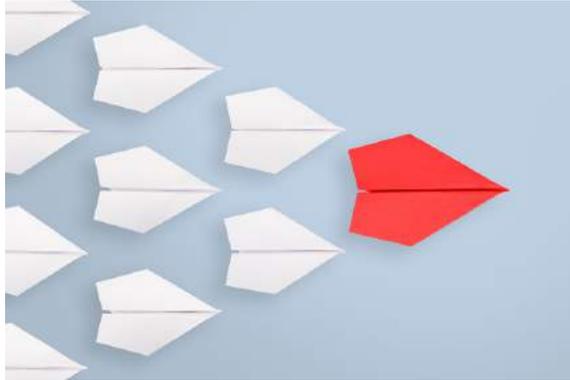


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# Friction



# Leadership



What are some of the attributes that you associate with a good leader?

**Leadership  
Attributes**

- Humor
- Listen
- Inspire
- Focus
- Communicate
- Integrity
- Support
- Attitude
- Respect
- Vision
- Adapt
- Collaborate
- Trust
- Creative
- Motivate

Remember the titans

**Participative**

**Authoritarian**

**Delegate**

**Leadership Styles**

Monsters Inc



# Authority vs. Leadership



**“Leadership has nothing to do with your title. True leadership is the ability to have a positive impact on another person.”-  
Simon Sinek**



BE A GREAT LEADER: HOW TO INSPIRE OTHERS TO DO REMARKABLE THINGS W/ SIMON SINEK <https://www.marieforleo.com/2016/06/simon-sinek/>

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**When I hear the word **improv** my first thought is.....**



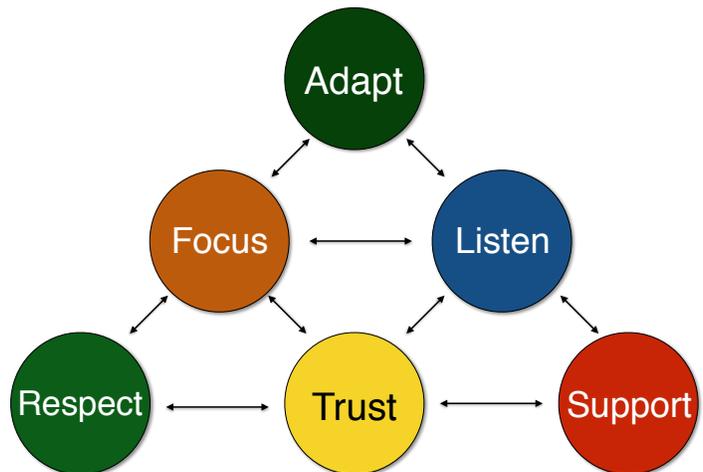
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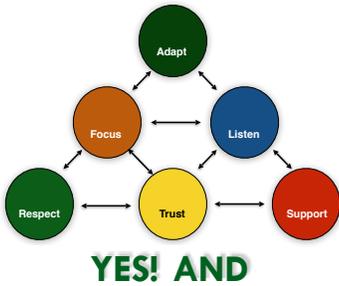
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# The Principles of Improvisation

**YES! AND**



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I would like you to take on some additional responsibility.

**NO, BECAUSE**  
**YES! AND**  
**YES, BUT**



# Listening

Internal Barriers

External Barriers

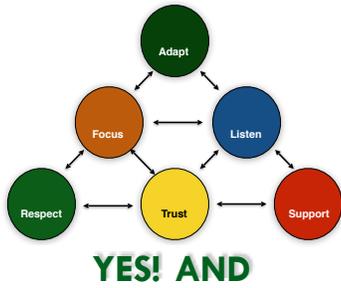


Video

# Listening



Is  
it a coincidence  
that listen and silent  
have the same  
letters?



# One Word at a Time



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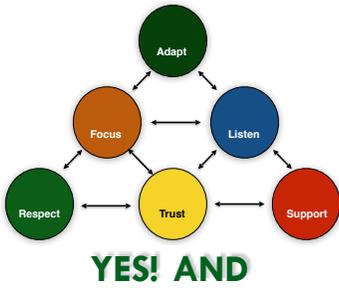
**What  
distractions  
hinder your  
focus?**



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# Last Word Spoken



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# Improvisation IS



- Moving forward in a positive new direction
- Accurately assessing the needs of a given situation
- Taking action to address relevant issues
- Operating clearly in chaotic situations
- Creating something out of nothing
- Taking risks



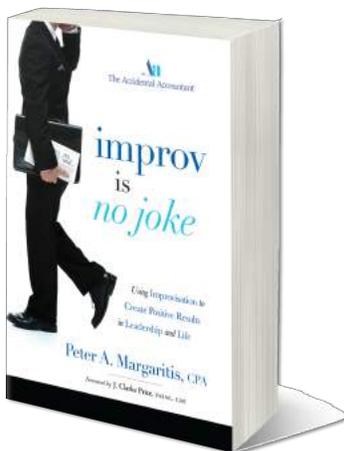
Source: "Improv Yourself: Business Spontaneity at the Speed of Thought" by Joseph A. Keefe

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# Resources



- 'Oh, My God, Where Is This Going?' When Computer-Science Majors Take Improv, WSJ, May 14, 2019
- Three Improv Exercises That Can Change the Way Your Team Works, Tom Yorton, HBR, March 9, 2015
- Yes And - How Improvisation Reverses No But Thinking and Improves Creativity and Collaboration by Kelly Leonard & Tom Yorton

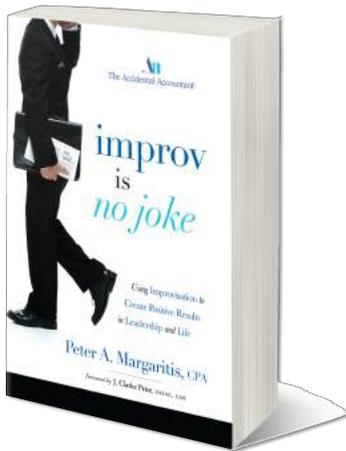


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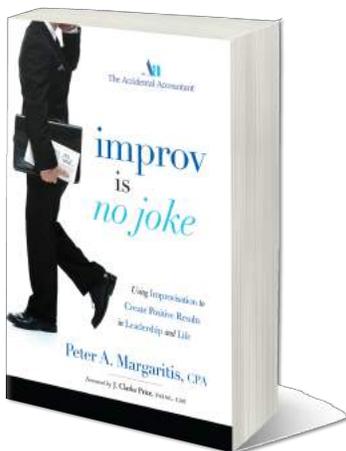
# Resources



- Fast Company - “Yes, And... Improv Techniques To Make You A Better Boss” by Lindsay Lavine
- Business Insider - “3 Rules of Improv Comedy Can Help You Have Better Conversations at Work and on Dates” by Jackie Katzman
- Vice.com - “How Improv Made Its Way into Corporate America” by Jacob Harper



# Resources



- Forbes - Why Improv Training Is Great Business Training by Jesse Scinto
- CNN - Why using improvisation to teach business skills is no joke by Mark Tutton
- Leadership Agility: Using Improv to Build Critical Skills by Kip Kelly



# WHAT IS BLI?

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BLI is the training affiliate of the MACPA. BLI's mission is to deliver competency-based courses, content and community that enhance learning and foster organizational and executive leadership.

BLI has grown into the largest provider of on-site training in the country. Pam and the Customized Learning Solutions team have grown the business in three core segments – Corporate, Firm and Government.

## THE BLI CURRICULA

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Today's business environment demands the need to gain competencies and share strategic knowledge. BLI delivers competency-based curriculum, courses, content, and community to enhance learning and grow intellectual capital for organizational and executive leadership.

These soft skills are essentially people skills – the non-technical, intangible, performance skills that determine your strengths as a leader, manager, and team member.

### STRATEGIC MANAGEMENT

Strategic conversation reflects the dynamics between the organization and its environment. The closer the language reflects current and potential customer dynamics, the higher the company's profit potential.

### LEADERSHIP DEVELOPMENT

Great leadership is one of the most valued of all human activities. Modern myth holds that "leaders are born not made," but leadership is a set of observable and learnable practices - it is the process people use when they bring out the best in others and themselves.

### BUSINESS MANAGEMENT

As the business world moves at an incredible pace, keeping up is a key to success. Today's financial managers must be able to translate strategy to operational and corporate growth.

### PERFORMANCE MEASUREMENT MANAGEMENT

Executives and managers must effectively transform their firms or companies into high performance organizations and progressively identify and develop the appropriate core competencies and link them to their business strategies.

### COMMUNICATION SKILLS

Many people in the business field cannot communicate effectively and, even more damaging, don't realize it. Success is not defined solely by a product line or service - it relies on relationships formed and maintained through skillful communications. Your competitors know this. Do you?

### TECHNICAL EXPERTISE

Keeping up with technical competencies is a core business requirement for financial professionals. Staying attuned to the latest changes, updates, and regulations are necessary components to staying competitive in an ever-changing business environment.

### TECHNOLOGY AND COMPUTER SKILLS

Harness the technology you use every day to make your business life easier and allow you to work smarter.



Please note that many programs in this catalog are available in Webcast format. Contact a BLI Customized Learning consultant if you are interested in a Webcast. 888-481-3500