Matthew Taylor, CPA
Director, AP Professionals

Keys to a Successful Start in the “Real World”
(And Other General Good Things to Know)
Outline

• Matt Taylor – Bio
• The Resume (Roadmap)
• The Presentation (Interview)
• Goldfish
• “Real Life” disasters to learn from
• Mentors & Networking
• Q & A
Matt Taylor – AP Professionals
CPA, Accountant, Recruiter, Connector

• Leverage 12+ years experience – public accounting, large company, small company
• Place experienced finance and accounting professionals at companies in the greater Rochester area
• Work with students – prepare for their shot!
The RESUME

• This where the PRESENTATION starts – WHAT???

• Dictionary Definition – A short account of one’s career and qualifications prepared typically by an applicant for a position.

• MJT Definition – roadmap between interviewer and interviewee with stops along the way to highlight skills and experience.

• “But what if I don’t have any experience??”
The RESUME

• GOAL – Highlight your transferable skill set – highly sought after intrinsic qualities of a valued employee

• Examples…..
  – Leader, hard work ethic, teammate, customer service, attention to detail, problem solver, appreciative, kind, willingness to learn, idea generator, teacher, motivated, family, honesty, dynamic, confident.
The PRESENTATION

KEY!! Work backwards – identify these highly sought after qualities, include them in your presentation with real world experiences that directly relate to your resume

Note: should be comfortable with these examples (practiced!!) ready to be able to get into a example (story) like it is second nature
The PRESENTATION

GOAL

• Answer questions directly
• And more!
• Highlight quality
• Say It (the quality)!
Big Money Answers
EDUCATION/ HONORS
The State University of New York at Geneseo  
Bachelor of Science Accounting, Cumulative GPA 3.55, Accounting GPA 3.88  
Dean’s List five semesters

WORK EXPERIENCE
Dan Beaty CPA, Rochester, New York  
January 2011 – April 2011  
Responsible for preparing individual tax returns, independently completing tax research and assisting clients

Ben and Jerry’s Scoop Shop, Orlando, Florida  
June 2009 – August 2009  
Provided efficient, friendly and courteous customer service and helped maintain a well organized, clean store

Geneseo Campus Auxiliary Service, Geneseo, New York  
January 2009 – December 2010  
Responsible for food preparation and provided excellent customer service

COLLEGE ACTIVITIES
SUNY Geneseo - Accounting 102 Tutor; Assist students in preparing for tests in financial accounting
Institute of Internal Auditors - Student Member, Attend CPE and obtain exposure to accounting professionals
GOLD (Geneseo Opportunities for Leadership Development) Training - Attended 7 personal and leadership development workshops
2009 Monroe Residence Hall Council - Vice President; Attended weekly meetings while assisting in the planning of hall activities and fundraisers

VOLUNTEER WORK
American Cancer Society – Team Captain for Relay for Life
Juvenile Diabetes Research Foundation
The PRESENTATION

• Practice, Practice, Practice!!!
• How? – Academic affiliations, mock interviews, parents friends, professionals in network
The PRESENTATION

Whole Picture

• RESUME
• Practiced Presentation – connects the dots of experience and qualities
• Good questions – develops credibility; be prepared – do your homework
• Thank You’s (the little things!)
Really BAD & Really GOOD.
“Fishbowl Perspective”

Remember – everyone is watching.....
First Impressions

• 1st thirty seconds summarize:
  – Smarts
  – Success
  – Economic Status

• Message = Invest in Your Image!
Other Interesting Topics

• On the way to the Interview...... from the car, to the elevator, to the office, to the interview

• Communication – a MAJOR (if not THE MAJOR) key to success!

  Tony Robbins definition - To effectively communicate, we must realize that we are all different in the way we perceive the world and use this understanding as a guide to our communication with others.

  OR

  Build a bridge, foundation for a successful relationship (put yourself in their shoes).

• “Old School” – Perceptions
  – Cell phones – CPA Partner
  – Ear Buds – partner vs. staff
  – Communication styles – text, email, phone, walk over!
  – Coming to work on time – AP ie.
  – Recent SBU grad breakfast – TRUE STORY!
Connections and Networking

• Mentors, GET ONE! Or TWO!! (A.K.A. – the beginning of your professional networks)
• Professional Relationships - Develop and Foster
• How? Make connections, ASK for help.
• Do the little things = favorable first impression.
  • Thank You’s
  • Referrals & connections
  • Follow ups
• Soft Skills are **SKILLS** like Technical Skills – need to work at it regularly and practice
• Examples – Names, Appearance, Professional Style
KEYS to Success

Questions/Comments