

INSTRUCTOR: Peggy Gilmer
OFFICE: Pigott 532
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OFFICE HOURS: Wednesday 2 – 6pm and by appointment

CLASS TIME: Wed 6:00 – 8:40PM
CLASS ROOM: Pigott 201

COURSE INTRODUCTION:

Mastery of the technical aspects of accountancy is necessary but insufficient of to be successful in your career. The best accountants are skillful communicators and are competent in managing client relationships so that people want to work with them.

This highly experiential class focuses on the art of communications and the emotional intelligence essential in business relationships. We also address the essential conversations in which an accountant need be proficient to engage clients effectively and deliver results that will benefit them.

The class is designed to replicate real life situations you will encounter throughout your career. It is a laboratory to practice and develop these skills and qualities. It includes a team based case study in fixed asset auditing where professional auditors will take the role of 'client' to ensure true to life engagements.

LEARNING OUTCOMES:

- Apply self / other awareness tools to achieve the best business outcomes.
- Apply the five essential conversations appropriately in business situations.
- Deliver audience aware presentations.
- Demonstrate ability to manage stakeholder relationships.
- Utilize feedback to develop yourself and your colleagues in a positive way.

REQUIRED TEXTS:

No text required.

There is an instrument every student must take and complete by 9am 3/31 as it will be used throughout the course. The cost of the instrument is \$75 and includes access to the class and your team's profiles for the semester. You can learn about the instrument at: <https://birkman.com/assessment-solutions/the-birkman-method/>

The instrument can be accessed and purchased as follows:

This is the link that the student will use to pay for the Birkman (the course title is on the page). Once they have paid, they will be taken directly to the site to take the questionnaire. If anyone has any problems or questions, by all means, they can call me. Rachael Layne rlayne@ssizone.com phone: 302 525 6313

https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=BJSRP6X4KK3JA

CLASS POLICIES:

Lecture notes are provided on Canvas and must be brought to class. All homework will be prepared on a computer. Handwritten assignments will not be accepted. Collaborative learning is used extensively in this course to deal with assignments. Students are encouraged to discuss assignments with their classmates (unless specifically prohibited). However, each student on an individual basis must do the actual preparation of individual homework assignments. Copying of another student's assignments is considered to be unethical behavior and will result in a ZERO on the assignment. Additional penalties may also be assessed. See the discussion of academic honesty below.

PROJECTS AND HOMEWORK ASSIGNMENTS:

The projects are cases and practice sets which give practical experience with selected material discussed in lecture. Projects and homework are to be turned in at the start of class on the due date (if hard copy is turned in - place on table at front of classroom prior to beginning of class). Late assignments will not be accepted. Some assignments take many hours to complete – so plan accordingly and schedule your time so you may meet the deadlines. This policy regarding late assignments mirrors requirements in the business world where late submission of deliverables has a career limiting effect.

GRADING SCALE :

GRADE	
A+	97 - 100
A	94 - 96
A-	90 - 93
B+	87 - 89
B	84 - 86
B-	80 - 83
C+	77 - 79
C	74 - 76
C-	70 - 73
D+	67 - 69
D	64 - 66
D-	60 - 63
F	BELOW 60

ONLINE COMMUNICATIONS:

Besides the usual in-class and office hour opportunities for communication, I will often communicate with you online by making announcements in Canvas. Please keep in mind that online communications are not meant to substitute for class attendance. Some materials will be distributed only in class, and most course-related announcements will be made only in class. Furthermore, the fact that you did not receive materials by electronic means is not acceptable as a reason for failing to meet assignment deadlines.

I will use Canvas announcements or email to let you know about new materials that have been included in the website, or to send information regarding the conduct of the course. The main purpose of the Canvas website is to facilitate the distribution of materials, such as lecture notes. Please visit the website early on in the course to become familiar with its structure and contents.

The best way to get in touch with me is via email. Often I cannot check my telephone answering machine, but I check email several times a day on weekdays. Please use my Seattle University email (gilmerpe@seattleu.edu) for correspondence. Please always include the course title (ACCT 3010) in the subject line of your messages to me.

Please do not use email to ask questions that can be answered by reading the syllabus, the schedule, or by accessing the course's website. You may view your grades on Canvas. Please note that the percentage specified in Canvas may be calculated incorrectly – use the raw score to calculate your own percentage.

I look forward to your messages with comments, requests, or suggestions for class discussion. Whenever the issue addressed is of general interest I will reply via the website or in class.

Due to the constant threat of viruses, I delete without reading any messages without a subject, or with a subject that I find suspicious.

Note: I will only send messages to your Seattle U address. Please be sure to maintain free space in your mailboxes so that you can receive messages with attached documents. Let me know during the first week of classes if you are not receiving email from me. After the first week I will assume that you are receiving and reading my messages. If you find that you have missed important messages, try to obtain copies from your classmates or look on Canvas.

PROFESSIONAL DEPORTMENT:

You are entering a profession where punctuality and conscientiousness are expected. Regular attendance is encouraged. Late arrivals are disruptive to your classmates and disrespectful to the professor or guest speaker, so please make every effort to be on time for class. Leaving class at times other than the scheduled breaks are also disruptive and disrespectful. Please be considerate of your fellow students.

ACADEMIC HONESTY:

Seattle University is committed to the principle that academic honesty and integrity are important values in the educational process. Academic dishonesty in any form is a serious offense against the academic community. Acts of academic dishonesty will be addressed according to the Seattle University Academic Honesty Policy. The policy can be found at the address below:

<http://www.seattleu.edu/registrar/page.aspx?ID=87> (Links to an external site.) If you are not sure whether a particular action is acceptable according to the Academic Honesty Policy, you should check with your instructor before engaging in it. Verified instances of plagiarism, cheating and the usage of unauthorized sources in exams, papers and other academic projects will lead to a final grade of D or F, depending on the circumstances and severity of the violation. I will inform the department's chair about any occurrence of academic dishonesty. The dean of the business school will also be notified and a paper documenting the incident will be placed in your file. According to University policy, "a single instance of plagiarism can be the basis for suspension or expulsion from our programs." (Dean Joseph M. Phillips' letter to students, November 2003.)

CHANGES TO THE SCHEDULE:

The schedule is a tool to help you plan your time. Every effort is made to make the schedule as complete as possible, but there may be occasions when changes are required. Course requirements and weights may change depending upon circumstances. Check the web page on a periodic basis for changes that may have occurred during the quarter. I will also announce in class changes to the schedule. You are responsible for responding to ANY change in schedule or policy whether or not you are in class when the change is announced. Get a class buddy with whom you can share information.

DATE	LECTURE ITINERARY	PRE-CLASS READING & SUPPORT MATERIALS	DELIVERABLES
3/29	.Introductions .Syllabus/Learning Outcomes .What's Your Challenge .Challenge of Communications .Why Get Good at Communications .What Excellence Looks Like .Tools: Observer, Karpman, HM, . Birkman, Stretch Goal	.Instructor ppt in pdf format .Likeability Article .End of Stress Article	H/W: Take The Birkman by 9am 3/31 (Friday) https://www2.usgs.gov/humancapital/ecd/professionaldevtools/LadderofInference.pdf H/W: Transactional Analysis Article
4/5	.Debrief Birkman .Form Teams .Introduce Qualities & Tools .Review Best Practices for Teaming .Introduce the Case Study	.Instructor ppt in pdf format .Case Study ABC Birkman Team Profiles	Team Strengths and Gaps Initial Stretch Goal each member Team Assignment: How will we get our needs met and be productive? Start Team Journal <i>Team will need to meet between classes.</i>
4/12	.What is a Conversation .Introduce the 5 Essential Conversations .Conversation for Relationship .The Audit Process .Project Planning & Tools	.Instructor ppt in pdf format Peter Block article	Team Norms Team Charter Submit Stretch goals & plan Keep Recording Team Journey <i>Team will need to meet between classes.</i>
4/19	.Trust Before Tools .Conversation for Clarity .Conversation for Action .Requirements of a Kickoff Meeting .Team Time: Project Planning .Debriefing Process .FIRST Model	.Instructor ppt in pdf format	Team Assignment: Complete project plan Debrief: Team members (SSC) Keep Recording Team Journey <i>Team will need to meet between classes.</i>
4/26	.Check in w/Team Process .Conversation for Clarity .Role of Empathy .Importance of Vulnerability	.Instructor ppt in pdf format Brene Brown article	.Prepare your first draft elevator speech (video) H/W: Conduct Kickoff Meeting Individual: Debrief Kickoff

	.Presenting Oneself		Meeting (SSC) Keep Recording Team Journey <i>Team will need to meet between classes.</i>
5/3	.The Wisdom in Emotions .Conversation for Possibility .Requirements of a Walkthrough Meeting .Team Time: ...Tuning our Plan/Team	.Instructor ppt in pdf format McClaren article on Emotions	H/W: Conduct Walk Through Meeting Individual: Debrief Walk Through Meeting Keep Recording Team Journey Analyze Findings/Make READ Presentation slides. <i>Team will need to meet between classes.</i>
5/10	.Tuning our Plan/Team (on your own time) .Giving/Receiving Feedback .Presentation Excellence .Team Time: Build Presentation .Present rough presentation	.Instructor ppt in pdf format <i>article on presentations TBD</i>	Present Audit Presentation to Class. w/feedback from class. Keep Recording Team Journey <i>Team will need to meet between classes.</i>
5/17	.Importance of Gratitude .Requirements of an Audit Closing Meeting .Team Time: Refine Presentation	.Instructor ppt in pdf format <i>article on feedback TBD</i>	H/W: Conduct Audit Closing Meeting Individual Debrief Keep Recording Team Journey <i>Team will need to meet between classes.</i>
5/24	.Tuning our Team / Plan .Ladder of Inference .Conversation for Completion .Team Time: What needs completing in terms of task / relationship?	.Instructor ppt in pdf format <i>article on gratitudeTBD</i>	H/W: Conduct a Conversation for Completion w/instructor & client Prepare Team Story Presentation <i>Team will need to meet between classes.</i>
5/31	FINAL PRESENTATIONS	.Instructor ppt in pdf format	Present Ind/Team Journey