

AICPA Feedback for Success - College Program Manual

Opening Notes to Facilitator

This curriculum incorporates video, exercises, and discussion. The content is directed at soft skills for college students. The topic covered is “Feedback” and its role in early career success. The purpose of this module is to familiarize students with feedback as a continuous process that can be learned and improved. This feedback module is a short lesson with deep concepts. Preparing main points and moving the course work forward is critical to successful facilitation. This module can be extended by utilizing more time for the optional ice-breaker, debriefs, and Q&A.

(Optional) Supplemental Readings:

- Thanks for the Feedback: The Science and Art of Receiving Feedback Well, by Douglas Stone and Sheila Heen
- Find the Coaching in Criticism, Harvard Business Review, by Douglas Stone and Sheila Heen
- Tips to Practice Emotional Intelligence 2: Choice, www.s6seconds.org

Audio/Visual & Materials Needed:

- Projector
- Feedback for Success Powerpoint_College
- Print Handout: Candy Inc. Process Narrative Exercise_College

Module

Feedback for Success

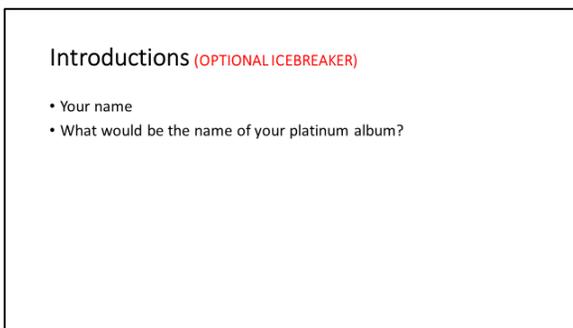
Introductions (including optional icebreaker)	10 minutes
Session Overview: What we will chat about	3 minutes
Play Video Part I	1 minute
The Role, Process & Types of Feedback	3 minutes
Candy Inc. Activity	25 minutes
Play Video Part II	1 minute
Triggers & Emotions	10 minutes
Play Video Part III	20 seconds
Play Video Part IV	1 minute
The Impact of Relationships	5 minutes
Maximizing Feedback	5 minutes
Succeed with Feedback: T.H.I.N.K.	15 minutes

Introduction



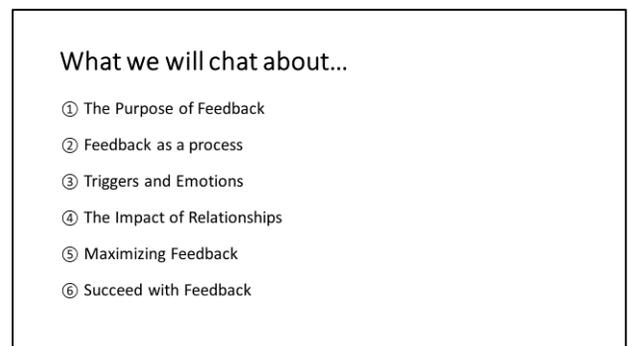
INSTRUCTIONS: Welcome the participants! Ensure everyone has a handout and a feedback card. The card needs to remain upside down until the later exercise. Introduce yourself as CPA and/or CGMA, describe your career journey and how your designation(s) have aided you in your career. Review the agenda with the group and share the learning objectives.

(OPTIONAL) Ice Breaker: Ask the participants to share their name and imagine they were a hit artist. They will need to name their platinum album.

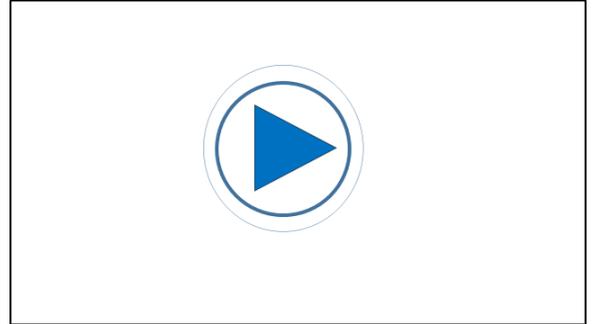


Learning Objectives:

- Participants will walk away with an understanding of feedback
- To become more clear on personal triggers and emotions associated with feedback
- Tools to put feedback into perspective and to be successful leveraging feedback in all forms



- Start Video (pause video again when screen goes black)



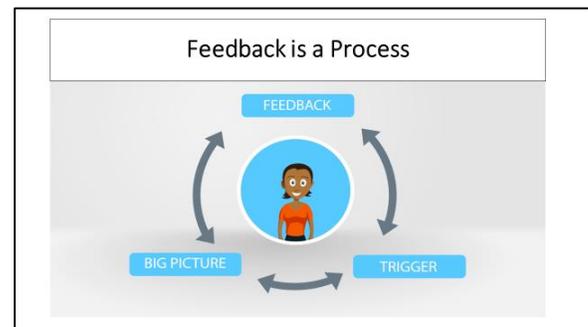
Video Concepts Reinforced

The Role of Feedback

- Feedback allows us to understand how our actions create impact.
- It's communicated with the underlying purpose of encouraging or discouraging our current and future actions.
- It's another person's perspective on something related to us such as our behaviors, actions, or words.

Talking Points:

- *Slide contains animation: 3 clicks
- Ask a participant to read each point



Talking Points:

- Reinforce that feedback is a process that is continuous. As a process it can be learned, practiced, and mastered!

Types of Feedback

- Direct
- Non-Verbal
- Subtle

Talking Points:

- Explain that the video displayed 3 types of feedback
- Share the importance of being aware of the different types of feedback, and that one is not more important than the other
- Note each provides information that we can leverage and learn

Candy Inc. Activity

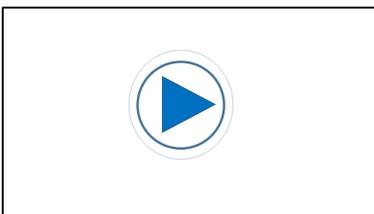
INSTRUCTIONS:

- (Pre-work) Review the Candy Inc. process narrative exercise to familiarize yourself with the task
- Introduce the activity process and instructions
- Assign half of the class as “staff accountants” and the other half as “senior accountants;” provide them the corresponding handout
- Staff accountants have 10 minutes to complete the narrative, senior accountants should be reading and preparing for their task during this time
- Provide 5 minutes for the feedback / review process
- Conduct a debrief session on the experience utilizing the slide questions: 10 minutes
- Bring up the concept of “giving” feedback. Share it is equally important to provide effective feedback to co-workers (peers). Discuss the experience. What could the feedback providers have done better?



FACILITATOR NOTES:

- Make note that the process narrative example is high level and it not fully indicative of an actual process narrative, in case of questions
- Pay attention to the body language of the students as they receive the feedback
- Monitor the tone of the feedback provided
- See if the rating system makes an impact on the delivery and acceptance of the feedback provided



Resume Video (pause video again when screen goes black)

Triggers & Emotions

Triggers & Emotions

Triggers: Provoke reactions from us
(i.e.)

- People - Relationships - Labels
- Tones - Words
- Environments - Power

Emotions: Many kinds present many choices. A choice to allow one state, or way of being to consume us

Talking Points:

- Feedback is often undesired because of the way it makes us feel
- Triggers and emotions can block us from receiving feedback
- Go through the slide examples and what you witnessed during the Candy Inc. activity, ask the audience to share too

“We all need people who will give us feedback. That’s how we improve.”

– **Bill Gates**

Talking Points:

- Triggers and emotions will always exist. When we are aware of their presence we can find perspective and choice
- Once we are clear, we can ask ourselves / others critical questions to uncover value
- Ask participants to have an “investigator” mindset when receiving feedback

Resume Video (pause video again when screen goes black)

Discussion Point:

- Ask the group: What do you think the manager's intention was?
- Allow for a couple of responses then return back to the video



Resume Video (final clip, play until the end)

The Impact of Relationships

Talking Points:

- Ask the class the provided slide questions
- Debrief the findings in the video
- Reference key sentences from the manager (i.e.) "I hadn't seen Michael" to reinforce how the situation could have been influenced if Michael had built a stronger relationship

<p>The Impact of Relationships</p> <ul style="list-style-type: none"> • How did your relationship impact the Candy Inc. exercise? • How might it have changed Michael's experience in the boardroom? 	
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Maximizing Feedback

Maximizing Feedback

<p> Recognize the Feedback Type</p> <ul style="list-style-type: none"> • Subtle: Beating around the bush • Direct: Obvious, example edits on a school paper, or 1:1 conversation with managers • Non Verbal: Actions are telling • None: Some managers will avoid the awkwardness or confrontation, you'll need to ask 	<p> Appreciate the Feedback</p> <ul style="list-style-type: none"> • Understanding the intention of the person giving the feedback • Not taking it personal, putting things into perspective • Recognize an opportunity to expand one's know-how to leverage and achieve positive results in the future • Learning and growing to achieve your full potential 	<p> One Step Further</p> <ul style="list-style-type: none"> • Context and Big Picture – understanding context and the big picture of the results of the feedback • Impact of your actions – Whether it be showing up on time builds consistency and responsibility or the attention to detail on the project will impact your grades • T.H.I.N.K
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Talking Points:

- Review each column & prepare personal examples to highlight key learning
- Reference your findings from triggers and emotions section / Candy Inc. activity
- Focus on "taking things further" by using T.H.I.N.K.
- The big picture helps us to maintain perspective. It provides context and an objective view of intention. And lastly, our actions affect others

Succeed with Feedback

- T** Thank the giver
- H** Hold comments
- I** Initiate clarifying questions
- N** Note action items
- K** Keep the big picture in mind!

Talking Points:

- Wrap up the conversations by asking participants to get stronger with feedback by remembering to T.H.I.N.K!
- Review the acronym and reinforce with examples from today's lesson

T.H.I.N.K Cont'd...

- Gratitude is an effective way to absorb new information
- Take a beat! Holding your comments will allow you to get passed triggers or emotions
- We all communicate differently. Be sure to ask questions to understand more about the feedback you've received
 - Examples: Do you mean... | Can you tell me more about... | How can I do it differently?
- Write down actions you can take to improve the behavior. Have a growth attitude, feedback is meant to make you better
- Remember that the feedback is telling you about the big picture. There are others affected or rules for certain environments

Talking Points:

- Walk through the bullet points. Utilize examples from your personal/professional experiences to add color
- Ask if there are additional questions to ensure the learning opportunity for the acronym was met

Thank you!



Facilitator contact XXXX

Learn more at www.aicpa.org

Talking Points:

- Share any desired additional information
- Thank the participants
- OPTIONAL COACHING QUESTIONS:
 - i. What did you learn today?
 - ii. How will you engage in feedback moving forward?
 - lii. Did anything surprise you?
 - iv. How can you apply what you've learned?