
# CONNECTOR PROGRAM TOOLKIT
# PARTICIPANT

CHARTERED PROFESSIONAL ACCOUNTANTS ALBERTA

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## Welcome

*Building business relationships, one connection at a time*

Networking is one of the essential elements in building a successful career. Developing networking skills and building your a professional network creates a pool of contacts for you can draw leads, referrals, ideas, and information to expand, and progress their career.

The Connector Program is a simple and highly effective tool that brings CPA members, candidates and students together to network, connect, and share information. We put the Participant (the person in need of expanding their network) directly in touch with local CPA volunteer Connectors—people who are willing to meet and make introductions to connect others to opportunities.

## Section 1: How the Program Works

### JOIN

Fill out the registraiton form and meet with the Connector Program Coordinator

### CONNECT

### INFORMATIONAL INTERVIEWS

The Participant and Connector will be introduced to each other based on shared professional interests and goals.

We recommend Participants meet with the Connector for up to an hour. At the meeting, the Connector should try and answer questions about career options, industry outlooks, and/or professional resources.

Informational Interviews are an opportunity to learn and gather information, as well as, perhaps, to impress the person one is meeting with.

### CONNECTOR PROGRAM EVENTS AND WORKSHOPS

Throughout the year, the Connector Program hosts several facilitated networking events and workshops designed to help participants feel more confident in developing networking skills. Events may include: SPEED INTERVIEWING, NETWORKING, PANEL DISCUSSIONS, and LUNCH & LEARNS.

### REFER

After the initial meeting, the Connector may, assist the particiapant in other ways.

**THESE CAN INCLUDE:**

- Invite the Participant to a local networking event
- Attend CPA association events with the Participant
- Refer the the Participant to other professionals in their network; or
- Refer the Participant to other external resources

## Guiding Principles:

- ***Participants are advised that this is not a job placement service, and they should not expect an offer of employment as a result of the informational interview.***

- ***Time Commitment:*** The initial time commitment we suggest is the one hour informational interview. Additional time may be allocated for the Participant to follow up with new contacts and attend networking events.

- ***Matching:*** Based upon shared professional interests, and goals. Both the Participant and the Connector have the option to limit any additional contact after the initial informational interview at any time.

- ***Connector Responsibilities:*** The Connector is expected to meet with the Participant for approximately an hour to answer Participant questions relating to the accounting profession. It is expected that the Connector will clearly communicate expectations and boundaries of the relationship. There is no obligation on the Connector to continue the relationship past the initial informational interview.

- ***Participant Responsibilities:*** The Participant should initiate contact with the Connector after the pairing has been made by the CPA Connector Program Coordinator. Participants should prepare for the meeting by being ready to discuss topics and ask questions. This should ensure that the process is productive.

- ***Potential Mismatch:*** In the event, after reasonable effort, the Participant is unable to schedule the informational interview with the Connector, the Participant may ask to be matched with a new connector by emailing connector@cpaalberta.ca

- ***Maximum Number of Connector Pairings:*** Participants may request the program coordinator to mach them with a maximum of two individual Connectors. Additional meetings after that will be the responsibility of the connector to seek out and request a meeting.

## Section 2: Connector Program Events

Throughout the year, the Connector Program will provide opportunities for Participants to meet with program members and accounting professionals, and develop their soft-skills.

You can learn more about upcoming Connector Program events by visiting:

https://www.cpaalberta.ca/Services/Career-Centre/Career-Development-Events-and-Workshops

**Networking Events**

In affiliation with the CPA **Mentorship Programs,** these events will bring Mentees, Mentors, Connectors and Participants together in a professional event to share program experiences, ideas, and build collaborative relationships.

**Speed Networking**

Practice builds confidence and skills; you can fine tune your communication and networking skills during this interactive event. You will meet with local business professionals and experienced CPAs with at least five years of progressive experience over the 1 hour event.

## Section 3: Participant Checklist

**In order to ensure that program participants are meeting the expectations of the program, Participants should complete the checklist below. Doing so will maximize the benefits of participating in the Connector Program.**

**Before being matched with a Connector**

- ☐ Contact a Career Advisor for a resume critique and discuss other career related needs
- ☐ Upload your resume onto the Connector User Platform
- ☐ Complete your Connector Program Platform Profile
- ☐ Discuss your expectations and goals of the Connector Program with the Connector Program Coordinator

**Before you meet with your Connector**

- ☐ Complete the SMART goals worksheet to the best of your ability
- ☐ Schedule your Connector Meeting on the Connector Program User Platform
- ☐ Research the Connector and the company they work for
- ☐ Create a list of questions to ask the Connector
- ☐ Consider printing business cards
- ☐ Ensure your LinkedIn profile is up to date (optional, but highly recommended)

**After meeting with your Connector**

- ☐ Send a thank-you note/email to the Connector
- ☐ Complete the meeting on the Connector Program User Platform (see Section 8: Manage your Connector Meetings)
- ☐ Complete the Connector Program survey within 48 hours of receipt
- ☐ Add your Connector on LinkedIn (optional, but highly recommended)
- ☐ Conduct any necessary follow-ups as needed (e.g. follow-up with referrals provided)

**On-going**

- ☐ Stay informed and attend Connector Program workshops and events

## Section 4: Next Steps – Preparing, Processes, and Tips

**1. Complete your Connector Program Platform Profile**

See *Section 5: Connector User Platform Guide* for additional instructions.

**2. Introduction to your Connector**

The average time it takes for a Participant to be paired with a Connector is one month from the time you meet with the Program Coordinator. When the Program Coordinator has found a suitable Connector, the Participant will receive an email introducing them to the Connector. The email will provide details including the Connector's name, title, employer, phone number, email and a brief biography. Similar information will also be provided to the Connector about the Participant. Participants are expected to keep this information confidential and should not share connector information with 3rd parties without the connector's consent.

***Please note, if Participants have not uploaded their resume onto the Connector Platform, they will not be introduced to a Connector.***

**3. Making Initial Contact with the Connector**

The Participant is expected to make initial contact with the Connector to arrange a time and location for the meeting. Initial contact may be made by either telephone or email or a LinkedIn message if they are connected already.

**Tips for making initial contact**

- Research the company where the Connector works and check the location on a map.
- Consider some locations near their office that may be an appropriate meeting place (coffee shop, food court, public venue such as a library).
- Suggest a time, date, and location that might work for the meeting. Providing specific dates and times allow the Connector to look at their calendar and either agree or provide alternative times and dates that work for them.

A sample email is below for scheduling a meeting:

Subject: RE: Connector Program Introduction

Good Afternoon Jane,

I am happy to have been introduced to you.

As the Coordinator indicated in the previous email, I am presently working in an AP role during the day, however I am working downtown.

Would you be able to meet me at the Local Devonian Gardens that is across the street from your office on December 11th at 11:00am ?

I look forward to meeting you in person.

Sincerely,

John Doe

When the meeting date and time has been set, please enter the information in the Connector User Platform (Please see Section 5: Connector User Platform Guide)

## 4. Preparing for the Connector Meeting/Informational Interview

- **Conduct research**, look at the Connector's employer, company, or industry before meeting with them.
- **Prepare questions** before the meeting. Sometimes, it is helpful to practice asking these questions to friends or family members. *See Appendix A: Deciding what Questions to Ask.*
- **Be realistic**. It is unlikely you will receive all the information wanted from one person in a 1 hour meeting. Limit the number of questions to five or six and ensure that they are open ended enough so they cannot be answered with a simple "yes" or "no".
- Take some time to understand who you are and where you want to go. *See Appendix B: Setting Your Career Goals and Objectives: The First Step to Getting the Most out of the Connector Program.*
- **Practice your elevator speech**. Do you know what you are going to say if asked "Tell me about yourself?" *See Appendix C: Appendix C – Links to Career Resources*
- 
- *Several* helpful Tipsheets such as *Suggestions for Introducing Yourself*, or *Top 10 Suggestions for Using a Free LinkedIn Account* can be found on our Career Resources page that is regularly updated with new recorded webinars and helpful resources:

https://www.cpaalberta.ca/Services/Career-Centre/Career-Resources

- *)*

## 5. Suggestions for Informational Interviews

- **Dress professionally:** Part of marketing yourself is looking professional. Dress as if going to an interview (suit, blazer, tie, etc.).
- **Take notes:** Bring a notebook and pen to write down important information or referrals.
- **Give the Connector time:** Make the first part of the interview solely about the Connector.
- **Be respectful of their time:** Unless suggested by the Connector, it is important to keep to the time frame agreed upon for the meeting.
- **Turn off electronic devices:** It is easy to forget cell phones are usually on. Even if the Connector keeps their phone out, be respectful of their time and put your phone in your bag or pocket. This shows the person they have your full attention and you are actively engaged in the meeting.
- **Maintain eye-contact and be appreciative:** Shake hands at the beginning and the end of the meeting. When shaking hands, don't look down. Thank the Connector for their time and advice at the end of the meeting.
- **Be professional and positive:** This is a professional contact, so keep a positive and professional attitude. Now is not the time to vent about ongoing personal issues or negative frustrations with job search. A Connector meeting works best when both parties are upbeat and focused on present or future opportunities. While your personal life may initially be part of the discussion, remember that the intention of the meeting is to focus on career development information and networking opportunities.
- **Bring a copy of your resume:** If your Connector has previously been provided with a copy of your resume, a portion of the meeting may refer to it.
- **Have personal business cards ready:** Be ready to share your contact information if requested.

## 6. Options for Mastering your Networking Skills and Building your Contacts

Connectors have the option to provide additional assistance you beyond the initial meeting. It is important to let them know what you hope to gain from the meeting. You can ask the Connector if it may be possible to:

1. To attend an upcoming networking event with them;
2. Receive information to external resources; or
3. Receive referrals* from their network

*** Referrals are optional and are given at the discretion of the Connector**

## 7. Asking for Referrals

Referrals are from connectors are recommended, but are not guaranteed from participation in this program. Your approach during the initial interview may impact how comfortable the Connector is to provide a referral.

- Approach the informational interview as if you were doing research on the Connector and their company; be curious and genuine about the person you are meeting. If you are engaged in the process, there is a high likelihood your Connector will also be engaged.

- At the end of the meeting, thank the Connector for their time and advice. Make an effort to summarize what you have learned from the conversation.

  *"Jane, it was really informative meeting with you today. I appreciate your honesty and willingness to share your experiences about working for a firm. I was particularly interested in your stories about your external auditing experiences…"*

- Be clear about why it would be beneficial to meet with other people in their network.

  *"I am very interested in learning more about career progression opportunities in a firm. Do you happen to know anyone who would be willing meet with me so that I might ask them similar questions?"*
- Your interest could be further solidified by indicating how you can relate to their work experience.

  *"Career progression opportunities within a firm are of great interest as I really like the idea of working with external clients and being able to interact with different areas of industry. My current position with Company X requires me to talk to people constantly. I can see how working in a firm would be progressive step in learning how to deal with customers…"*

- If the Connector indicates that they want to think about it, thank them for considering it. Give them some time to decide and then follow up for their decision.

**8. Following up with the Connector**

- Follow up with a "thank-you" message either via email, *LinkedIn message, or a personal note. Show your appreciation for them making the time to meet with you and summarize one key take away from the meeting to indicate you were listening attentively.
- *Request they connect with you on LinkedIn. Send a personalized message in your LinkedIn connection request., In the thank-you note, you can also indicating that you will be sending a LinkedIn request.
- If the Connector provided a referral at the meeting, thank them and let the Connector know how and when you intend to contact their referral. Let the referral know who provided you with their contact information.

9. **Making Contact with Someone After a Networking Event**

The Connector Program offers opportunities to meet with other Participants and Connectors in the program at ongoing networking events.

After attending a networking event, you may collect new business cards from people you met. Some tips for following up with new connections are below:

- At the end of the event, make a few notes on the back of the card to help you remember the person; what you talked about, and what you may wish to discuss with them in the future.
- Follow up with the new contact within 48 hours of the event. Send them an email, give them a call, or invite them to connect on LinkedIn.
- In your follow up message, be clear about what you want, Are you lookin for a face-to-face meeting, or informational interview, or trying to connect for another reason?
- Be prepared to hear NO to an invitation to connect. People are busy, listen to the reasons they are saying no, if they decline to meet or connect accept that and move on.
- If they say YES, show genuine interest in who they are and what they do. Remember not everyone you meet will become an ongoing relationship. Sometimes people become just want to connect on LinkedIn and don't follow up. Do not expect everyone you meet to become a mentor or meaningful business relationship.

## Section 5: Connector Platform Profile Instructions

### 1. Email Confirmation

Within 48 hours of meeting with the Connector Program Coordinator, you will receive an email from with your user name and password.

Dear John Doe,

Welcome and congratulations on your participation in the Connector Program.

The networking program is a formalized network initiative that puts you directly in touch with business leaders in the community in hopes to expand your professional network and get settled successfully into the community.

This online tool is to assist with tracking your connections and progress throughout the program. Please log onto our website to get started.

Your user name and password are below:

User Name: JDoe

Password: wRsKSkXw

Sincerely,
Connector Program Administrator

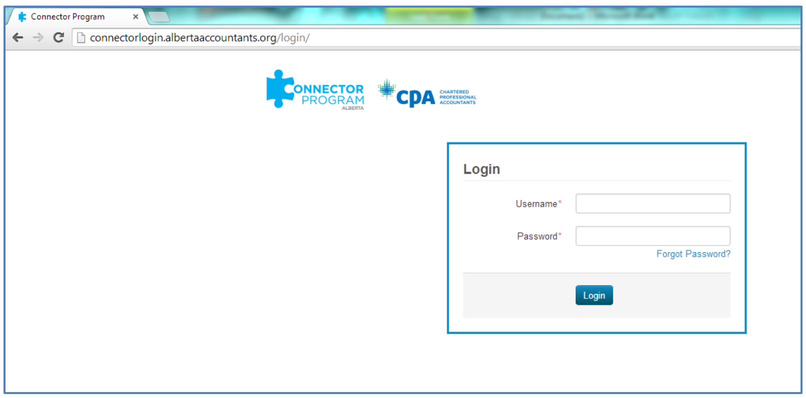
Please do not reply, this is an automated message. If you are having trouble reading this message, you can view it in your notifications panel online.

If you do not receive this email within 48 hours, check your JUNK MAIL inbox to see if it might have been caught by your spam filter.

If it is not there, email connector@cpaalberta.ca and advise that you have not received the email with your program login information.

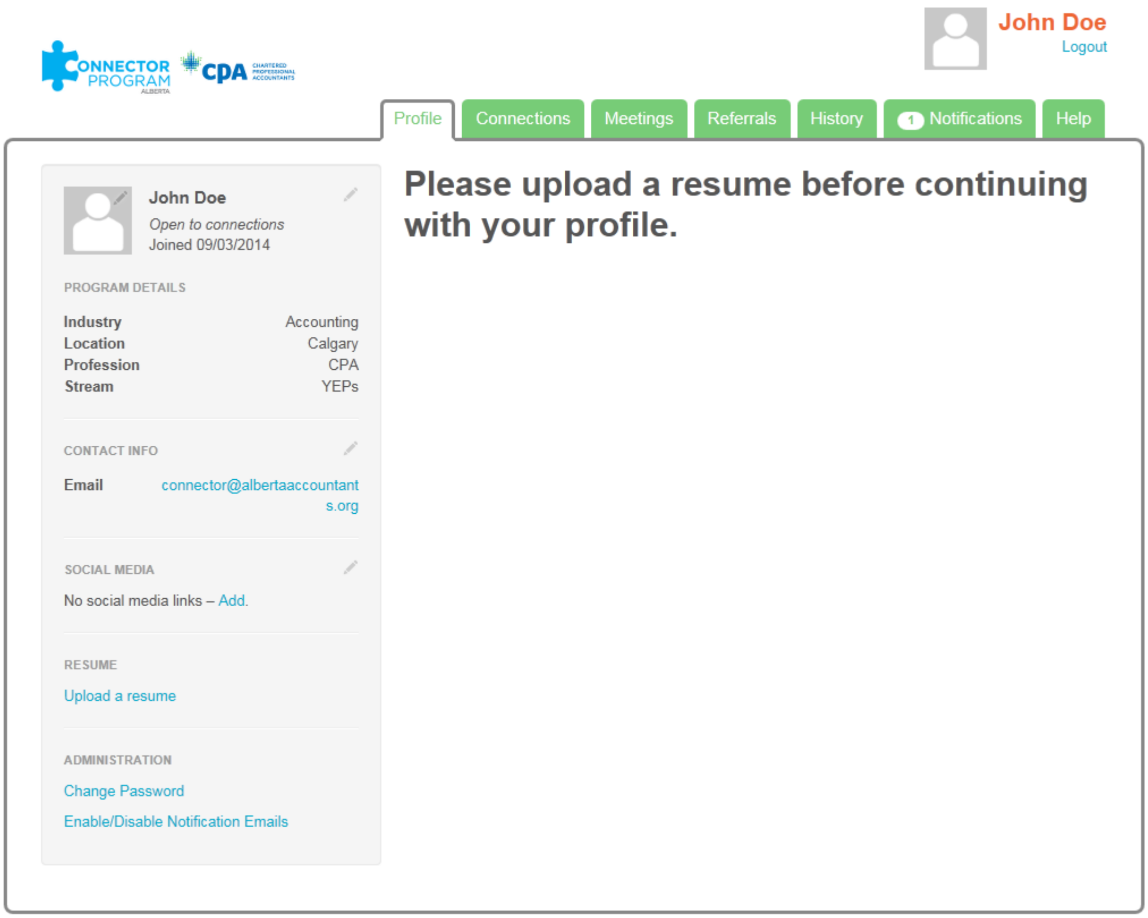
## 2. Access the Connector Platform

Log onto the platform at https://www.cpaalberta.ca/Services/Career-Centre/Mentorship-and-Networking-Programs/Connector-Program/Connector-Program-Login

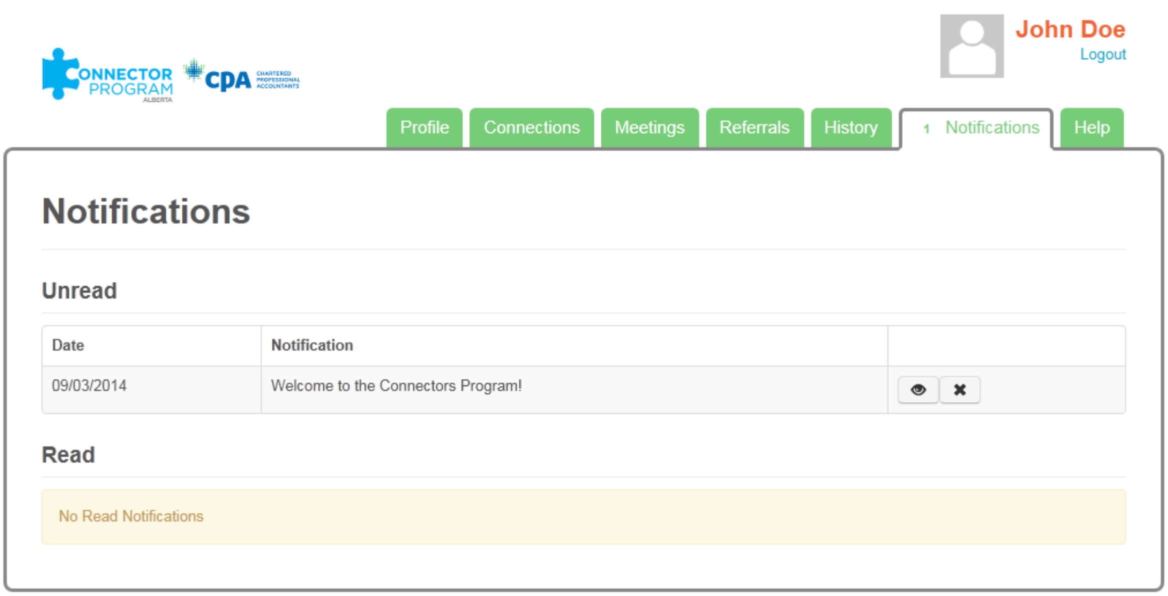



## 3. Complete your Profile

*To **complete your profile***, simply click on the "+Add" tabs and fill in the requested information. Be sure to include contact information as well as a copy of your recently critiqued resume. **You will not be matched to a Connector until your profile has been completed or until you've received confirmation from the coordinator that you are ready to be connected.**




Notifications tab: This is where any communications from the Connector Program will be received.

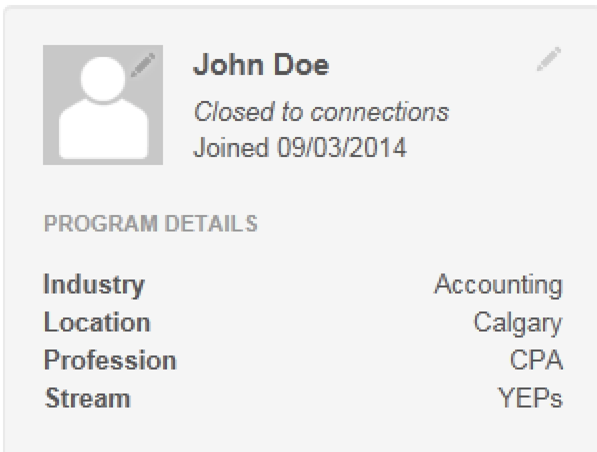


Click the Help Tab if you need any assistance or support using the system

**4. Change your Password**

To change your password, click the corresponding button under the Administration portion on the left side of the screen.

To upload your professional photo, click on the crayon shaped button in the top right hand portion of the picture.




Please ensure that the photo is a JPEG format

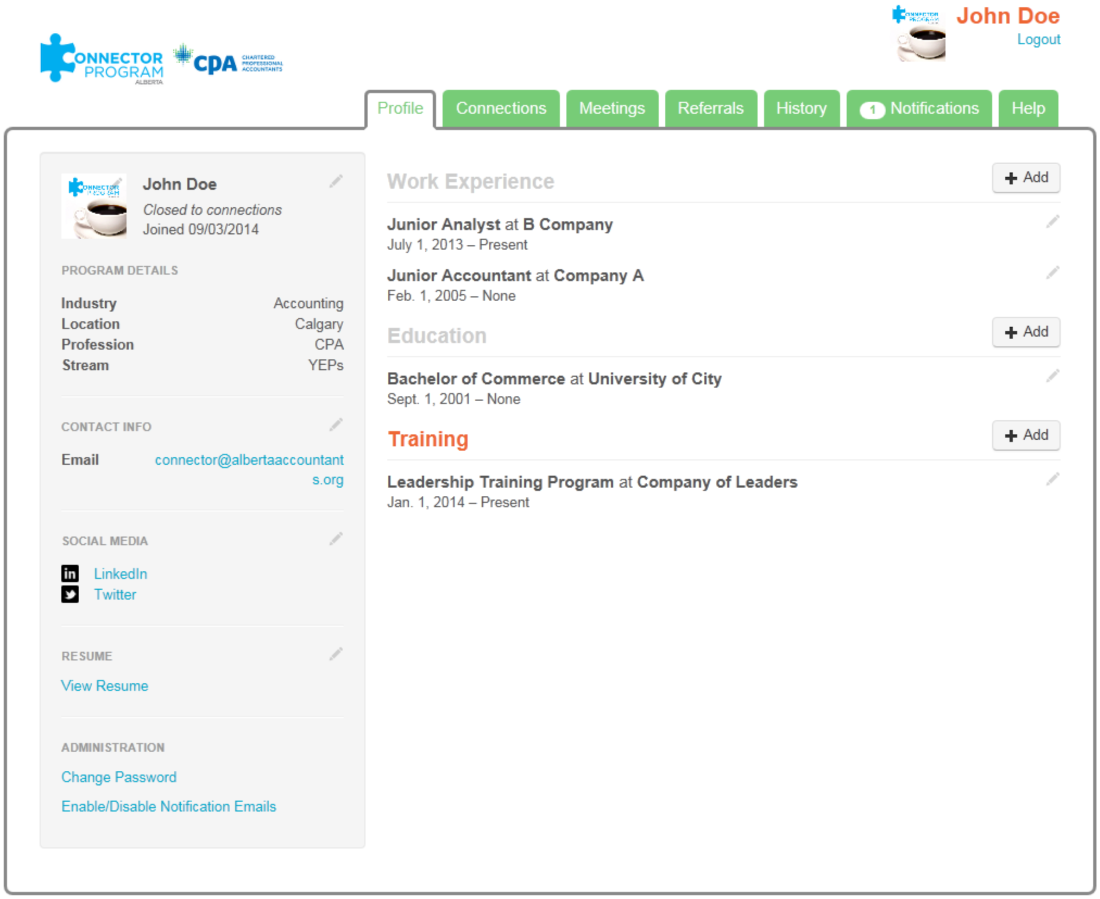
**5. Change your status to “Open to Connections”**

Click on the crayon shaped button in the top right-hand corner of your name.

**6. Upload your Resume**

**7. Add your Work Experience, Education, and Training**

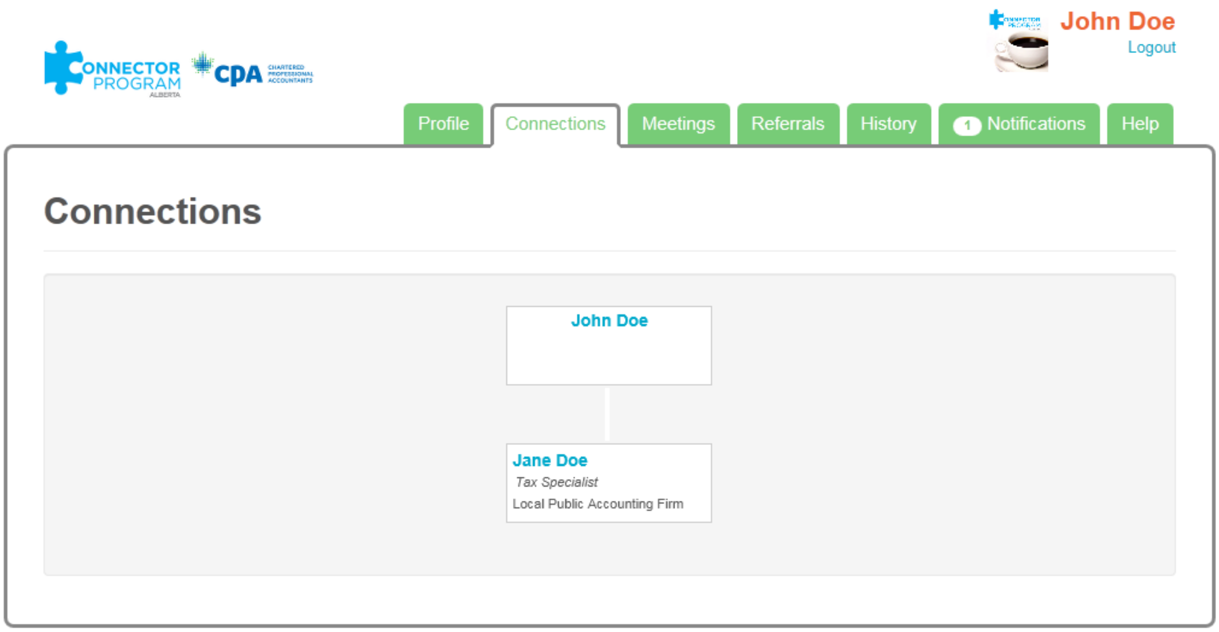
Your profile should now look similar to the example below.


CONNECTOR PROGRAM ALBERTA
CPA CHARTERED PROFESSIONAL ACCOUNTANTS
John Doe
Logout
Profile
Connections
Meetings
Referrals
History
1 Notifications
Help
John Doe
Closed to connections
Joined 09/03/2014
PROGRAM DETAILS
Industry Accounting
Location Calgary
Profession CPA
Stream YEPs
CONTACT INFO
Email connector@albertaaccountants.org
SOCIAL MEDIA
LinkedIn
Twitter
RESUME
View Resume
ADMINISTRATION
Change Password
Enable/Disable Notification Emails
Work Experience
Add
Junior Analyst at B Company
July 1, 2013 – Present
Junior Accountant at Company A
Feb. 1, 2005 – None
Education
Add
Bachelor of Commerce at University of City
Sept. 1, 2001 – None
Training
Add
Leadership Training Program at Company of Leaders
Jan. 1, 2014 – Present

## 8. Manage your Connector Meetings

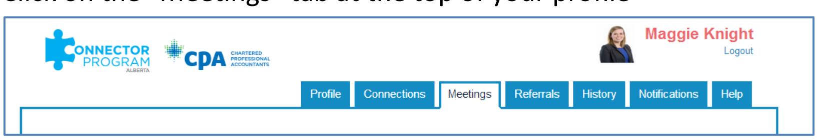
When a meeting is confirmed with a Connector, please input the details about the meeting before the meeting date. This tab will also help you manage meetings online.

*You will receive a notification, which will appear on your dashboard, if a meeting with the Connector has not been entered within two weeks of being paired.*

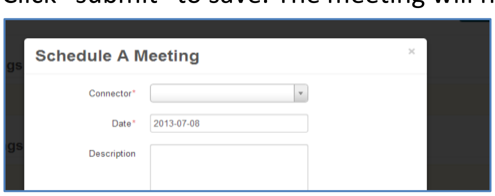



Notice that on the "Connections" tab you now have a connection.

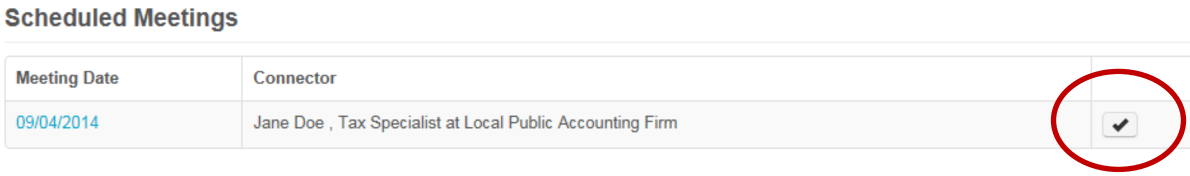
- Click on the "Meetings" tab at the top of your profile




- Click "Schedule Meeting"
- Choose the Connector you will be meeting with. If the person is not listed, please request HELP by clicking the "Help" tab
- Click "submit" to save. The meeting will now appear under the "Meetings" tab.

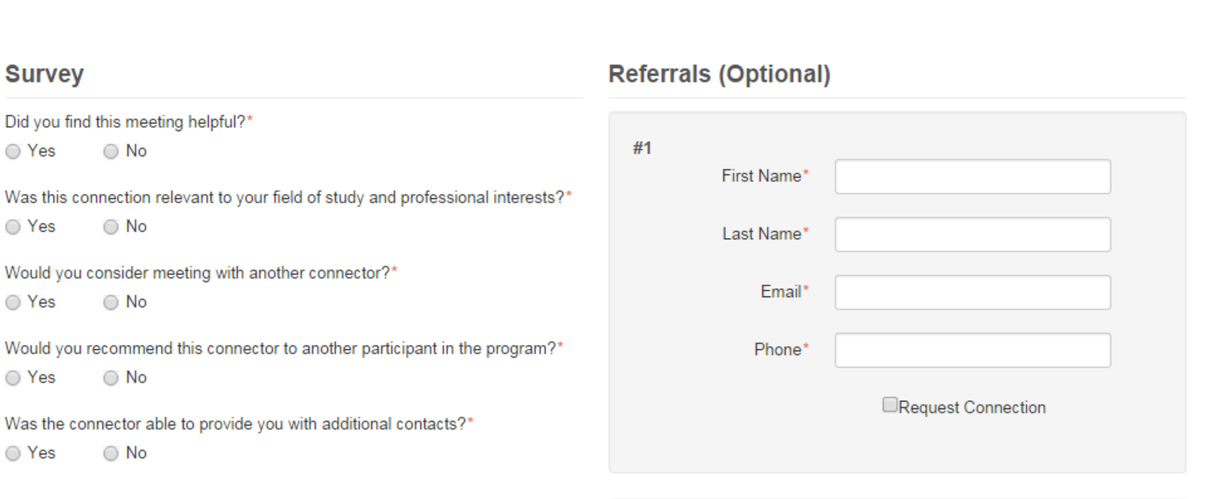


**IMPORTANT:** Once the meeting with your Connector is completed, go back to the meeting and click the check mark to "Complete Meeting."




## 9. Connector Program Survey

Once the meeting with the Connector has been completed, you will be prompted to complete a survey – please complete this survey within 48 hours of receiving notice. Feedback provided in this survey will be used to enhance the effectiveness of the Connector Program going forward.



# APPENDICES

## Appendix A – Deciding What Questions to Ask

To be effective in an informational interview, you need to be clear about the kind of information you are seeking. Below are some examples of questions that can be asked, and tips on how to focus the conversation.

If you want to gather information about a specific accounting role/positon, consider asking:

- What are some of day-to-day tasks associated with the position?
- What are the top three skills needed for the position?
- Is this position specific to the company, or is a similar position found in different organizations?
    - How is this role similar/different from comparable roles/positions in other organizations?
- What should I study, or where should studies be focused to enable moving into a similar position?
- Is there an entry level position that could be a stepping stone to this type of position?
- What have you learned from this position?
- What are some of the challenges associated with this position?

If you want to gather information about a specific industry, consider asking:

- Are there shared values among those individuals moving into this industry?
- What motivates you to stay in this industry?
- Is there additional training required of those individuals who enter into this industry?
- What experience and expertise is expected within this industry?
- Are there any unspoken expectations of people working in this industry?
- How does one remain current with industry specific information?
- How does one typically find employment in this industry?
- Are there any unique ways that people find roles within this industry?

If you want to gather information about a specific company, consider asking:

- Why did you decide to work for _______?
- In your opinion, how is this company different from its competitors?
- Do you feel optimistic about the future of ________?
- Have there been any recent changes to processes, business practices, or values at the company?
- What is the atmosphere within company/ department?
- How do you interact with your coworkers? Are you allowed to work autonomously?

If you want to gather information about someone's career or career progression/path, consider asking:

- What interests and keeps you engaged about the work that you do?
- How/where did you start your career?
- What was a key point in your career path that brought you to where you are today?
- Looking back on your career, would you change anything?
- What do you foresee as the next step in your career progression?
- If you were to have taken an alternative path, what would it have been and what would you have been prepared to take on?
- What parts of your previous education and experience have helped you the most in your present position?

*Other useful resources can be found through the following links:*

*hrweb.mit.edu/system/files/Sample+Informational+Interview+Questions.pdf*

## Appendix B – Setting Your Career Goals and Objectives: The First Step to Getting the Most Out of the Connector Program

The following document was designed to assist Participants in the Connector Program to prepare for their meeting with the Program Coordinator and the initial informational meeting with a Connector. Defining career goals is an important activity as it assists in establishing direction for your career and helps to focus on what you hope to achieve. Writing concrete goals will:

- Clarify your needs, wants and priorities;
- Provide direction and reference;
- Encourage the power of commitment and accountability;
- Increase motivation; and
- Celebrate your successes.

While very few people have clearly defined careers goals, doing so is an integral step of the profession's Connector Program's intake process. A well-written goal will:

- Assist in identifying a potential Connector, one better matched to address your career aspirations;
- Provide focus for conversations and assist in communicating what information is being sought from the discussion;
- Create a great first impression with the Connector; and
- Provide a benchmark to help monitor success, growth and development.

The most important elements when setting your goals is that they are **specific**, **concrete** and **realistic**! For example, while the goal of "I want to find a fulfilling accounting job in three months" is definitely actionable and time bound, it does not provide the core details needed to help us pair you with the most suitable Connector. Additional information is required, such as:

- What type of job are you looking for?
- What position?
- What industry?
- What companies?

Below are some examples of incomplete written goals that have been rewritten with specific objectives:

| Poorly Written Goals/Objectives | Well-Written Goals/Objectives |
|---|---|
| • To find a job | • Having recently received my designation, I am uncertain of the best career path to pursue. In the next month, I would like to obtain information on types of careers available to accountants, specifically within [industry, not-for-profit and government]. |
| • Be a great accountant | • Within six months, identify at least one operational inefficiency associated with my current position. |
| • Expand my network/network more | • Within six months, improve my networking skills to the point that I am comfortable introducing myself to at least five different people at the next networking event attended.<br>• Over the next year, expand my network to include three professionals work in [specific industry] so that I can better understand the opportunities, demands, and career potential of that sector. |
| • Gain industry knowledge | • Over the next year, develop a greater understanding of business acumen within the manufacturing sector in order to improve financial reporting for the organization.<br>• Discover the competencies are required to progress from a controller into a CFO position with a small public company within five years? |
| • Improve my professional skills/interpersonal skills | • Within the three months of holding the informational interview, discover three tools or resources that will improve my communication skills to better manage employees on my team. |

The following worksheets have been provided to not only help draft more robust goals and objectives, but allow better evaluation of the results.

## Worksheet – Setting Your Professional Career Goals

**Step 1: Self-awareness – Know Yourself**

When setting out a career plan or goal, and the foundation starts with self-awareness. Self-awareness will help you understand your skills, interests, strengths, values, motivators, competency gaps and work environment preferences. It involves answering questions such as:

- What are my interests?
- What kind of skills do I have?
- What are my work-related values?
- What is my work style?
- What are my ambitions?
- What would I like to be able to do that I can't do now?
- Why do I want to do it?
- What do I find difficult or challenging?
- What do I worry about?
- What would I like to change professionally to be different six months from now?

If you need some expert advice, we would recommend "What Next?" by Barbara Moses, or download "Advanced Techniques for Work Search" from the Alberta Learning Information Services (ALIS) website.

**Step 2: Career Awareness – Understand Your Options**

Accounting career options are endless. Understanding what options are available in the areas you are most interested in involves conducting research to expand your understanding and knowledge of potential career options. This research can be done through the Connector Program, the meetings you have with the Connector and through other network contacts.

Consider the following questions when trying to analyze the realities of a specific career path:

- What are the day-to-day activities and tasks?
- What qualifications are required for entry?
- What skills are required?
- What are the work environment and/or conditions?
- Are the values of this position aligned with my own?
- How will be position impact my current lifestyle?
- What are the financial realities and potential associated with the position?
- What are the future trends or outlook of the industry?
- Who are successful individuals within the industry?

**Step 3: Attainment – Understand What Success Looks Like**

Recognizing what your goal will look like once it's attained, but also how you will feel when it is achieved, will provide greater insight into which goals are most important and why. Understanding how success will be defined will help set the framework for your goals. It involves answering questions such as:

- How will you know when the goal has been achieved?

- What evidence of progress toward achieving the goal can be collected?
- What are the emotional drivers behind the goal?
- How do you feel when you think about achieving the outcome?
- Do you believe in the goal?
- Do you have doubts? Can they be replaced with positive outlooks?
- What milestones should be celebrated along the way?
- On achieving the goal, what will you be able to do that you can't do now?
- What will you accomplish?
- After reaching your goal, what will you do differently?

**Additional Tips and Resources:**

- Talk to others who will provide honest feedback on your skills, strengths and weaknesses.
- Meet with a CPA Career Advisor.
- Take personality assessments and/or interest inventories.
- Review job postings.
- Share your goals with someone.
- Review past performance reviews and evaluations.

## Worksheet – Working with Your Connector to Develop Action Steps to Attain Your Goals

Use this worksheet to discover specific action steps that can be taken to assist in the achievement of goals, or to reaffirm actions already identified.

My goal is:

| |
|---|
| |

Where am I now?

| |
|---|
| |

What needs to be done to reach this goal?

| |
|---|
| |

What obstacles will need to be overcome?

| |
|---|
| |

What solutions are available?

| |
|---|
| |

The following intermediate goals are focused on the next _____ months:

*Action steps I can take to achieve the goal:*

**Evaluation**

What can I do now that I couldn't do before?

How do I feel today?

## Appendix C – Links to Career Resources

Several helpful Tipsheets such as *Suggestions for Introducing Yourself*, or *Top 10 Suggestions for Using a Free LinkedIn Account* can be found on our Career Resources page that is regularly updated with new recorded webinars and helpful resources:

https://www.cpaalberta.ca/Services/Career-Centre/Career-Resources