



# Business Learning Institute

Powered by AICPA & CIMA

# Future Ready Finance: Critical Thinking in a Changing World

## **Instructor**

Alex Theis

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## **PRESENTED TO**

North Carolina Association of CPAs

In-person (Greensboro, NC)

November 18, 2025



# Business Learning Institute

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## Alex Theis

Alex is an international speaker, consultant, author, and podcast host. He helps people and organizations reach new levels of growth and success. His speaking focuses on increasing sales and customer retention, improving the customer/client experience, leadership, and personal growth. In his consulting work, Alex helps companies improve customer retention and loyalty and find hidden opportunities through sales analytics.

Alex's innovative sales programs have produced over \$100 million in revenue for his clients. His podcast, *Limitless*, has been downloaded over 5 million times and can be heard on Amazon, iTunes, Spotify, and anywhere podcasts are found. He's also a best-selling author of two books, including *Limitless Leadership: 25 Ways to Be a Leader in Any Situation*.



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### **ADDITIONAL MATERIALS FOR YOUR STAFF**

**Pam Devine, Customized Learning Manager**

800-782-2036, ext. 321 | [pam@aicpa-cima.com](mailto:pam@aicpa-cima.com)

Are You Working With The Right People?

Better Communication: How to Improve Your Presenting and Speaking Skills

Content Marketing: How to Grow Your Business Through Innovative Content Funnels

Getting More Done in Less Time

Limitless Leadership: Breakthrough New Levels of Leadership

Mental Conditioning – The Difference Between Good and Great

Stop Pitching and Start Connecting: Social Media Strategy for Business

Strengthening Connection: How to Defeat the Disconnect

The Missing Link: How to Grow Sales and Retention Through Customer Service

The Sales Process: How to Handle Future, Current, and Past Customers & Clients

# Critical Thinking in a Changing World

NCACPA Symposium  
November 2025

Alex Theis

## Learning Objectives

1

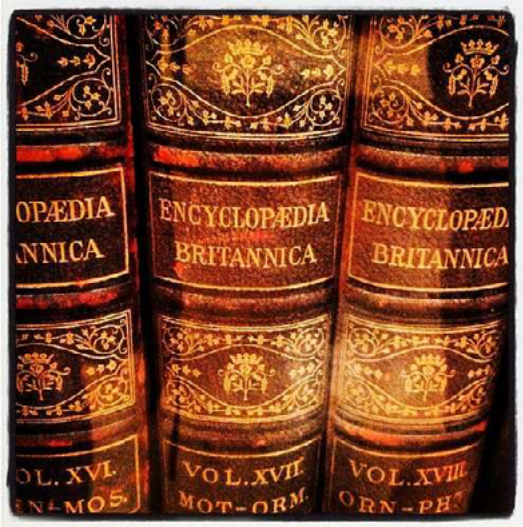
Identify the enemies of critical thinking

2

Recognize the power skills of sharpening  
your critical thinking

3

Identify the dangers of resisting change



1768



1993



WIKIPEDIA  
The Free Encyclopedia

2001



# What we'll cover today



Mindset



Enemies



Warnings/Dangers



Four Power Skills



Elevating Our Thinking

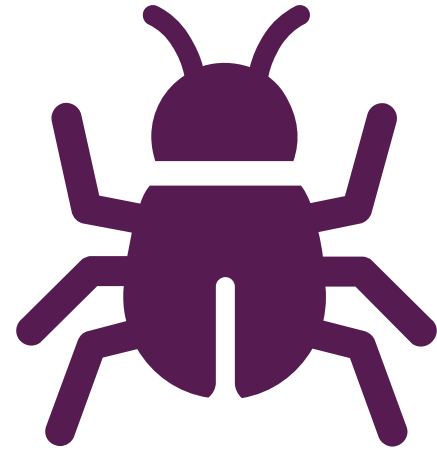


Fighting the Resistance

What is critical thinking?

## Warning:

If your thinking has bugs,  
your decisions will too.



Business Learning Institute  
CFO/CONTROLLER &  
FINANCIAL PROFESSIONAL  
UPDATES SEMINAR SERIES

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Poor decision-making  
costs businesses an  
estimated \$250 million  
per year for every 1,000  
employees in wasted **time**  
and **effort**.



*McKinsey & Company study, 2021*

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BLUE

WHITE

GREEN

ORANGE

BLACK

PURPLE

PINK

RED

# The Six Enemies of Critical Thinking



# Enemy #1: Confirmation Bias



## Confirmation Bias Fixes

Diversify data sources

Listen to your team

Associations & influences



# Enemy #2: Emotional Reasoning

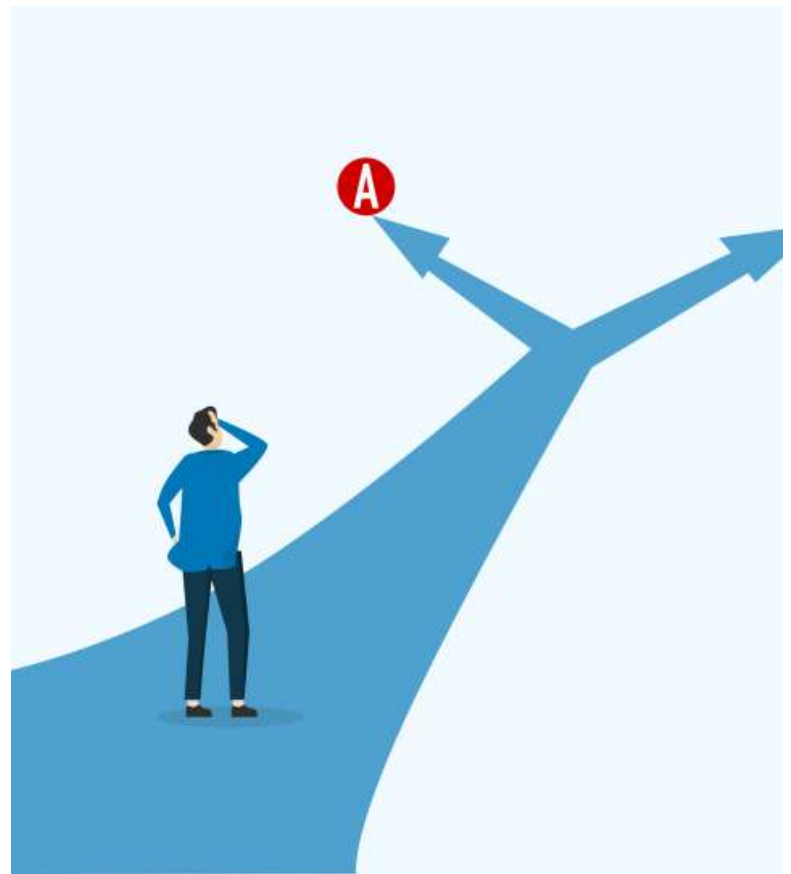


## Emotional Reasoning Fixes



- Set the intention
- $E + R = O$
- Pausing is power

## Enemy #3: Analysis Paralysis



17

## Analysis Paralysis Fixes



Reflect on experience



Be good with good



Narrow your choices

# Enemy #4: Lack of Psychological Safety



## Lack of Psychological Safety Fixes



- Get private input
- Read the room
- Response awareness

# Enemy #5: Time Pressure



**DEADLINE**

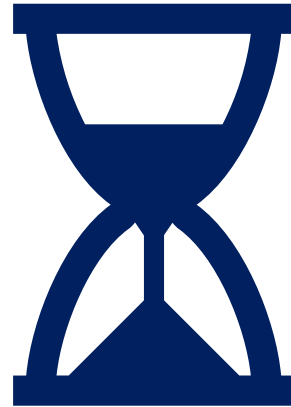
**Harvard Business Review:**  
Under time pressure, accuracy of workplace  
decisions can drop by as much as **50%**

# Time Pressure Fixes

Strategic risk-taking

Ask for help

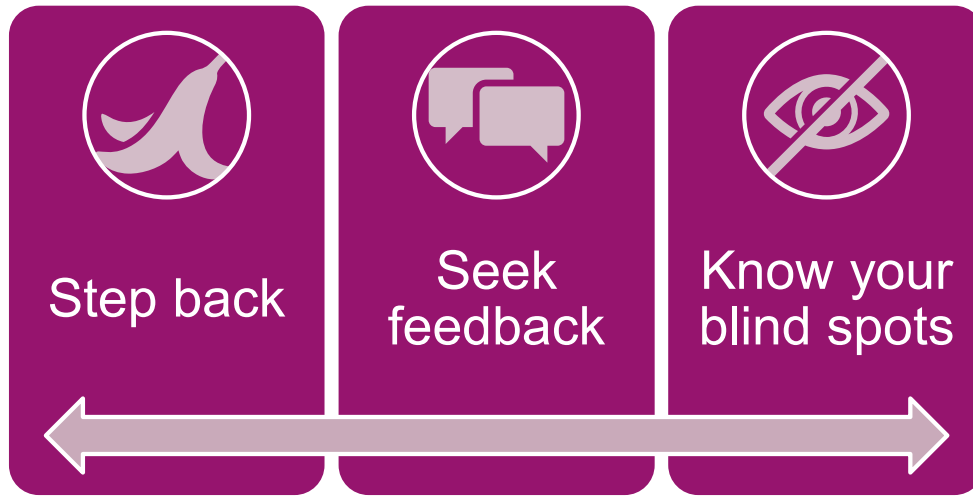
Eliminate busy work



## Enemy #6: Overconfidence



# Overconfidence Fixes



# The Antidote to the Enemies: Four Power Skills of Smarter Thinking



**Creativity**

# Turn Up Creativity

- Amplify curiosity
- Time away from tech
- Break patterns



## MIT:

Teams that brainstorm multiple solutions avoid 70% of decision errors



# Innovation



## Increase Innovation

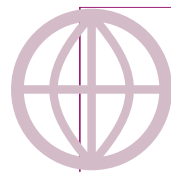
- Allow people to wow you
- Lean into adversity
- Challenge “best practices”



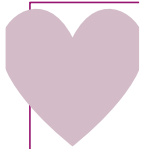


## Open-mindedness

### More Open-mindedness



Challenge  
your views



Increase  
empathy



Shift  
perspectives

# Reflection

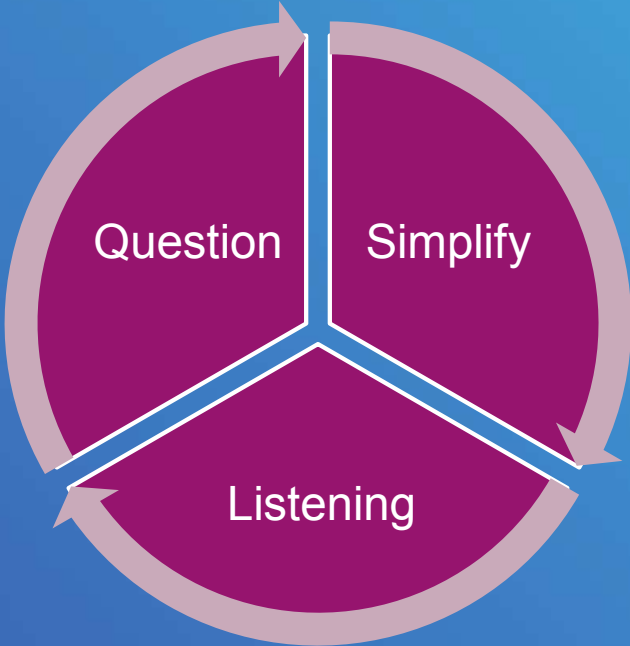


## Time for Reflection



- Schedule it
- Read – listen – watch
- Forward-thinking

# Micro-Skills





65% of executives say their organizations resist changing course even when data shows it's needed.

*Gartner study, 2022*

**RESISTING**



**CHANGE**

# New Thinking, New Levels



## Challenge:

- Pick 1 enemy
- Pick 1 power skill
- How will 2026 look?



# Thank you!

# What is the Business Learning Institute?

BLI is a training affiliate of the AICPA-CIMA. 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

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.

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### 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.

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### 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.

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### 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.

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### TECHNOLOGY AND COMPUTER SKILLS

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

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### 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.

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### 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?

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### 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.

*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.*