



Business Learning Institute

Powered by AICPA & CIMA

Future Ready Finance: Motivating the Next Workforce

Instructor

Alex Theis

PRESENTED TO

North Carolina Association of CPAs

In-person (Greensboro, NC)

November 18, 2025



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ADDITIONAL MATERIALS FOR YOUR STAFF

Pam Devine, Customized Learning Manager

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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



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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.

Motivating The Next Workforce

NCACPA Symposium
November 2025

Alex Theis

Learning Objectives

1

Identify what motivates you

2

Recognize what kills motivation

3

Identify ways to motivate the next workforce

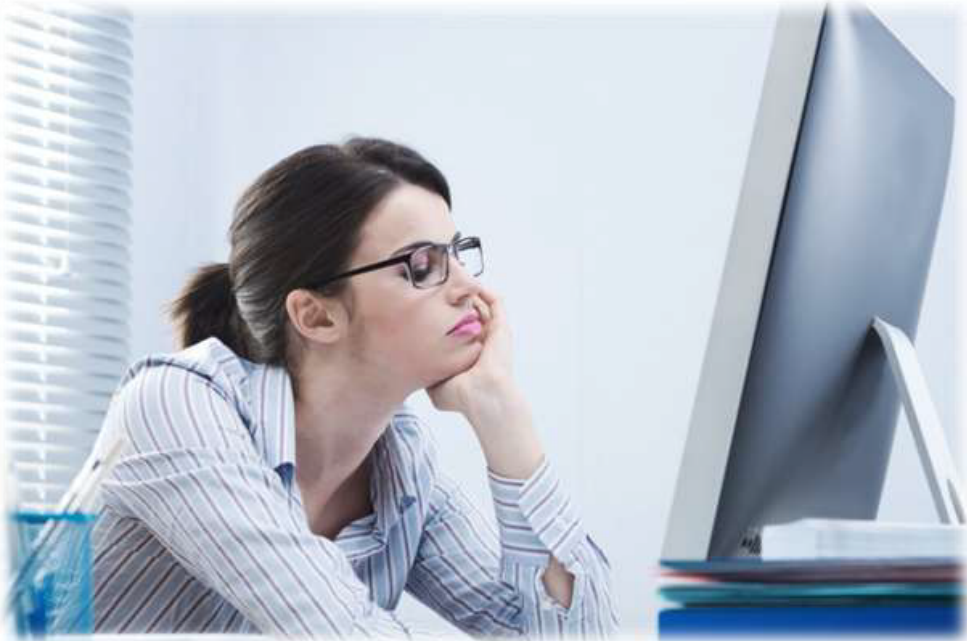
What motivates you?



The \$3.00 Whale

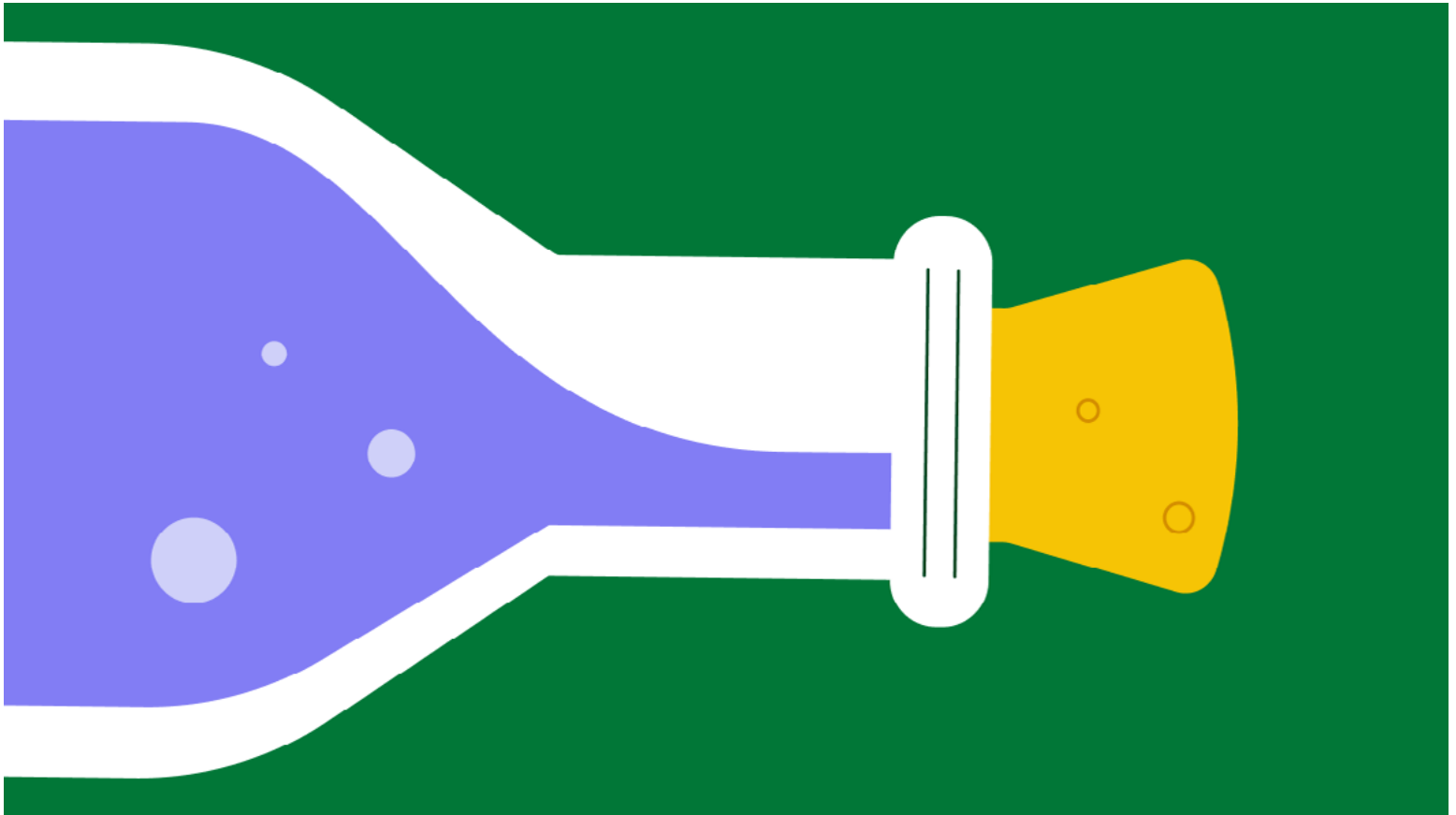


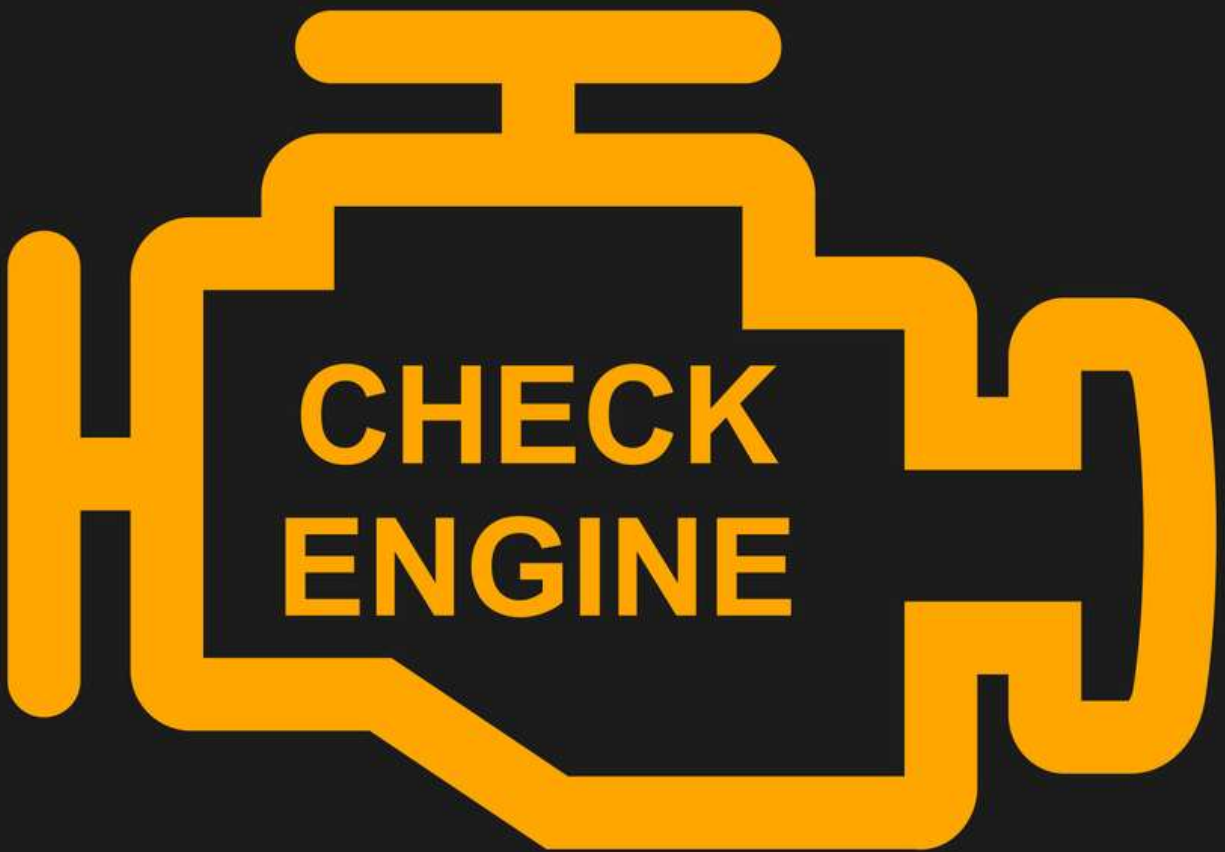
7 Motivation Killers



Micromanagers after saying, "I trust you."







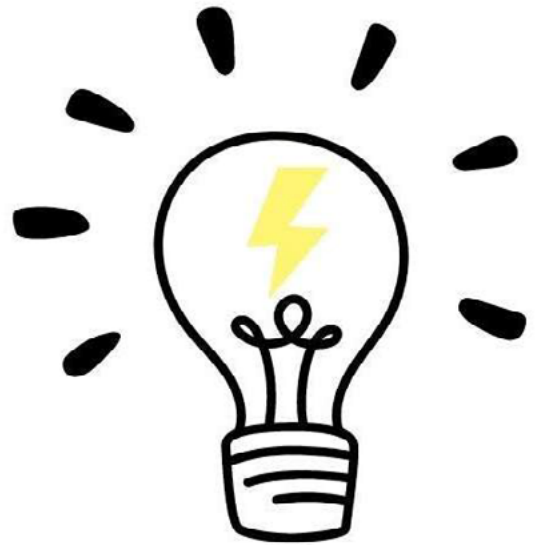


The Next Workforce Is Different





7 Ways to Motivate the Next Workforce



1

Motivation is contagious

19



2

What motivates them?

20

3

Appreciation: Are you using the right language?



21

Languages of Appreciation

 **READINGGRAPHICS**
ACTIONABLE INSIGHTS IN ONE PAGE



Words of
Affirmation



Quality
Time



Acts of
Service



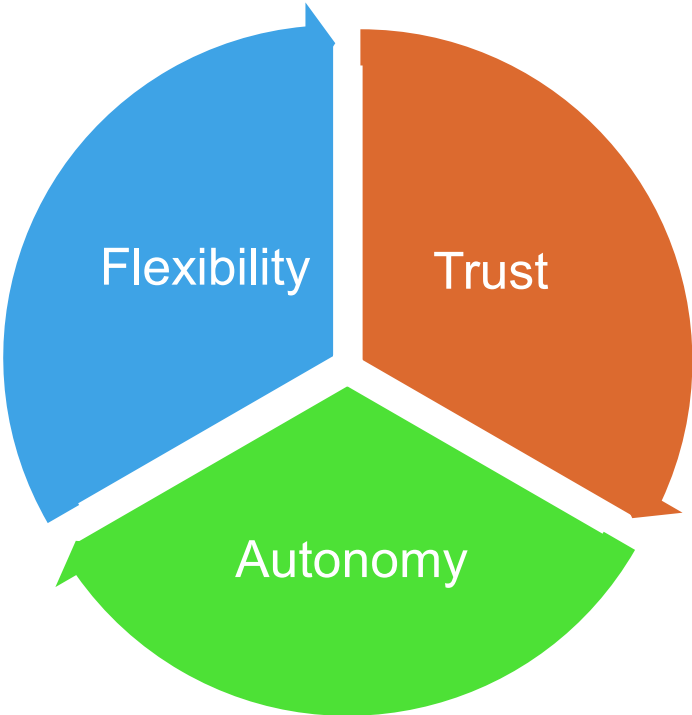
Tangible
Gifts



Physical
Touch

The energy you bring

4



5



6

Are you working with the right people?

7

Leaders set the temperature





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.

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.

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.

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.

TECHNOLOGY AND COMPUTER SKILLS

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

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.

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?

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.