



# 2020 Advisory Conference

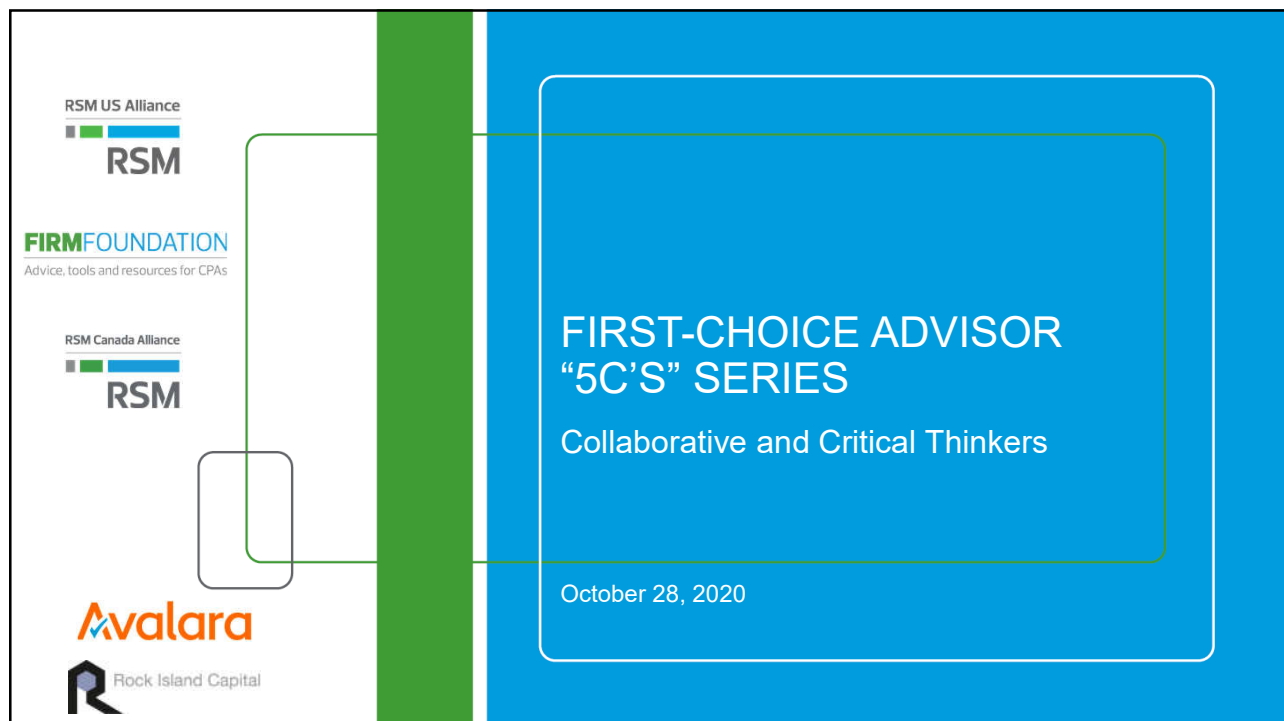
October 27–29

Converging knowledge and behaviors  
to deepen client relationships

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## FIRST-CHOICE ADVISOR “5C’S” SERIES

Collaborative and Critical Thinkers

October 28, 2020

## Speaker



**Pat Nunley**

Director

RSM US LLP

First-Choice Advisor Center

Dallas, Texas



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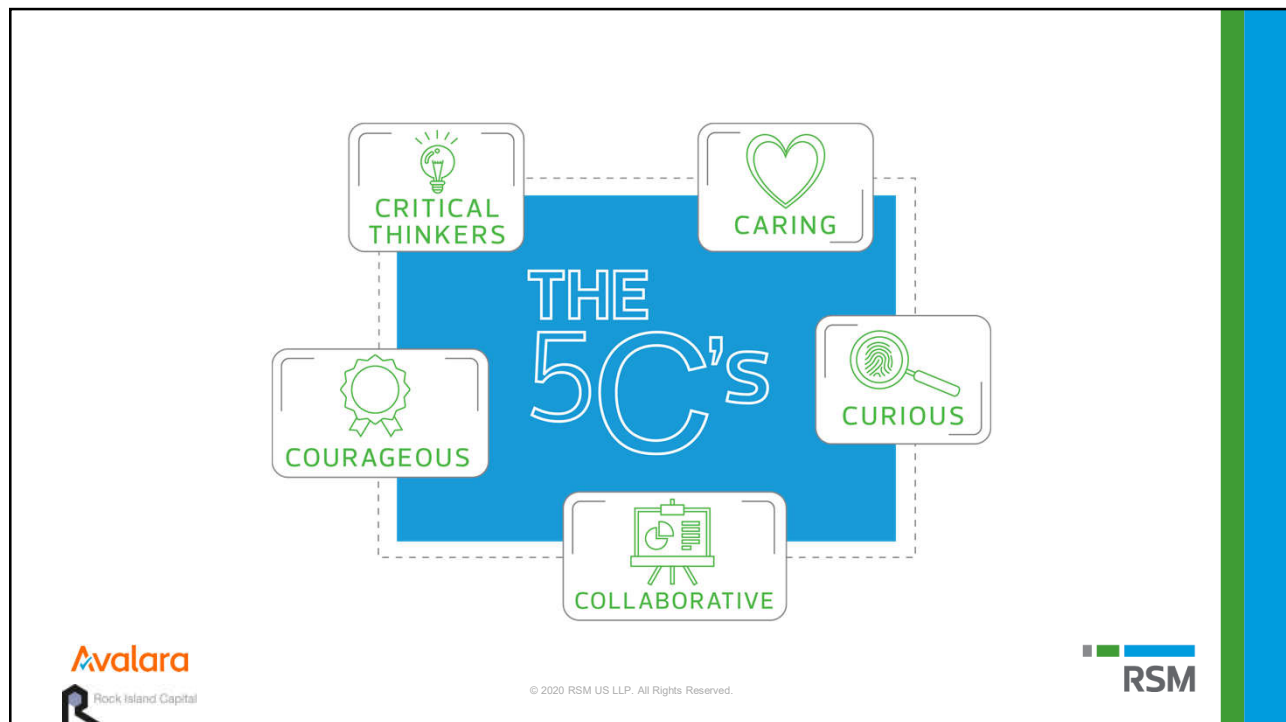
## Agenda

Topic	Minutes
Critical Thinkers	30
Collaborative	30



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## Objectives

By the end of this course, you will be able to:


- “Check our solution at the door” and facilitate collaboration
- Garner the “fingerprints” of their clients on a co-designed solution
- Examine a client’s situation with a different lens
- Develop a point of view that aligns with and adds value for the client

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# CRITICAL THINKERS

Removing Common Barriers

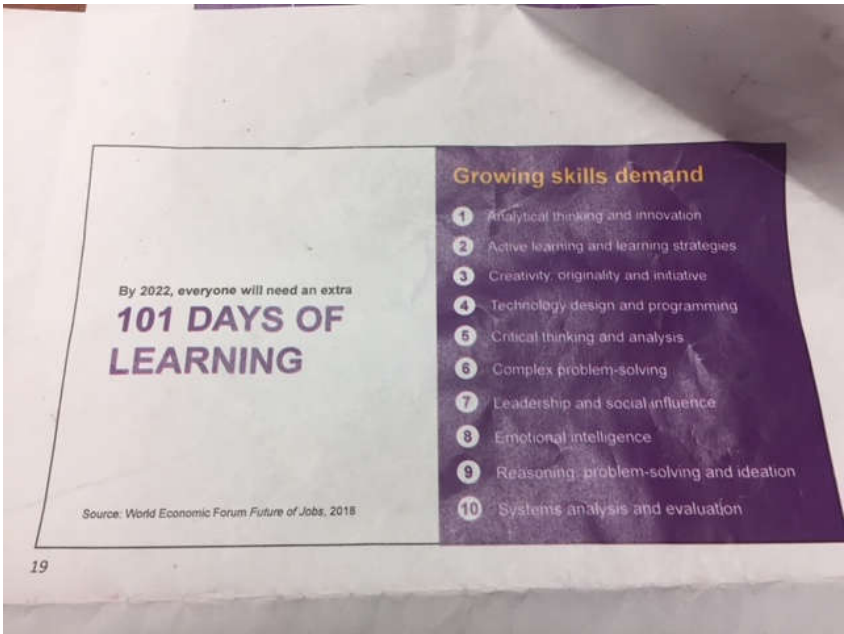


THE 5C's



We synthesize, apply and communicate complex information and concepts with clarity, objectivity and depth, and bring our best thinking and advice to help others make confident decisions.

*RSM First-choice Advisor Definition/Characteristics*



By 2022, everyone will need an extra  
**101 DAYS OF LEARNING**

Source: World Economic Forum Future of Jobs, 2018

19

**Growing skills demand**

- 1 Analytical thinking and innovation
- 2 Active learning and learning strategies
- 3 Creativity, originality and initiative
- 4 Technology design and programming
- 5 Critical thinking and analysis
- 6 Complex problem-solving
- 7 Leadership and social influence
- 8 Emotional intelligence
- 9 Reasoning, problem-solving and ideation
- 10 Systems analysis and evaluation

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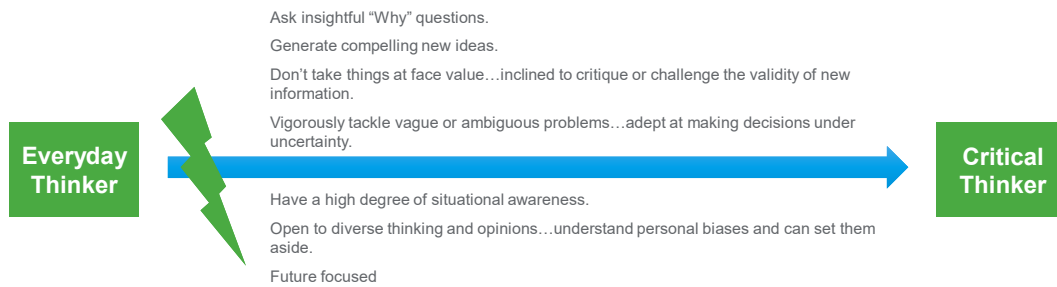
Melissa Korn  
Bosses Seek  
“Critical Thinking”,  
But What Is That?”  
The Wall Street Journal  
October 21, 2019

“

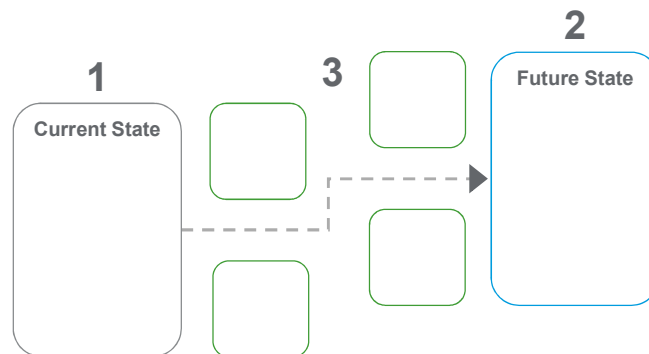
**Critical Thinking** is critical skill for professionals these days. What it means, though, and how to measure it, is less clear. Employers complain that colleges are not producing graduates who can solve problems and connect the dots on complex issues, but **bosses stumble when pressed to describe exactly what skills make critical thinkers.** That leaves employees wondering what employers really want and unsure of whether they are supposed to follow the rules or break them.

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## What Do Critical Thinkers Do?



## How Do They Do It?



- 1 What is currently going well/not well for the organization?
- 2 What does success look like?
- 3 What needs to happen in order to close this gap?

## What are Their Skills?



**THINK**  
about it

Are you solving the right problems?

How do you tend to position (or view) yourself when working with a stakeholder group to solve a problem?

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# COLLABORATIVE

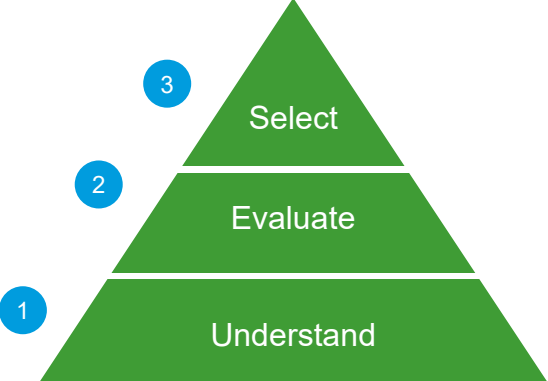
Making  $1 + 1 = 3$



COLLABORATIVE

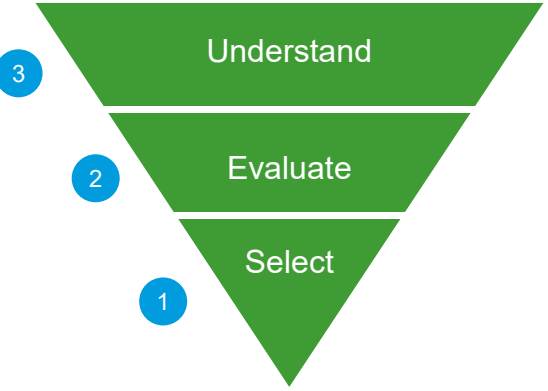
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## Collaborative Approach



1 Understand  
2 Evaluate  
3 Select

A COMMON APPROACH



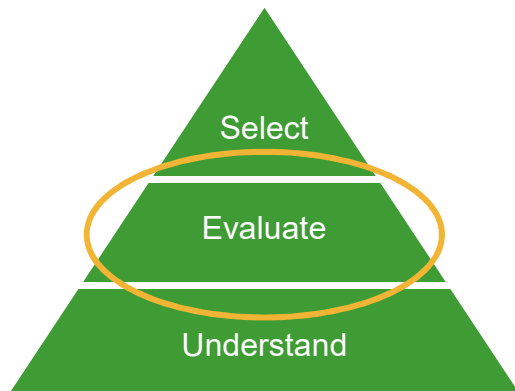
1 Select  
2 Evaluate  
3 Understand

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## Collaborative Approach



Where is the greatest opportunity for collaboration?



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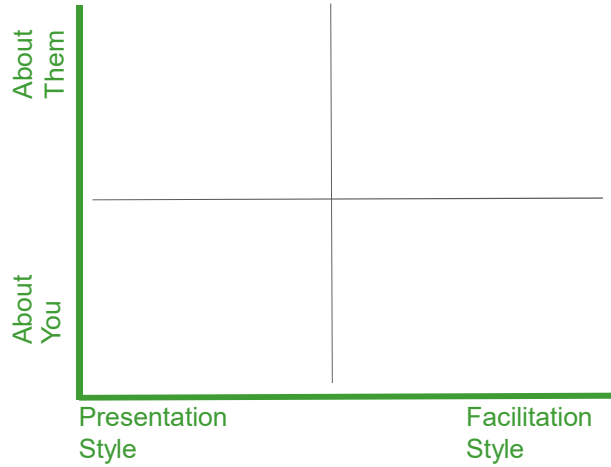
## THE 5C's



We believe that collaboration leads to better outcomes, and we seek and share perspectives to encourage innovative thinking to solve problems and enable others to seize opportunities.

*RSM First-choice Advisor Definition/Characteristics*

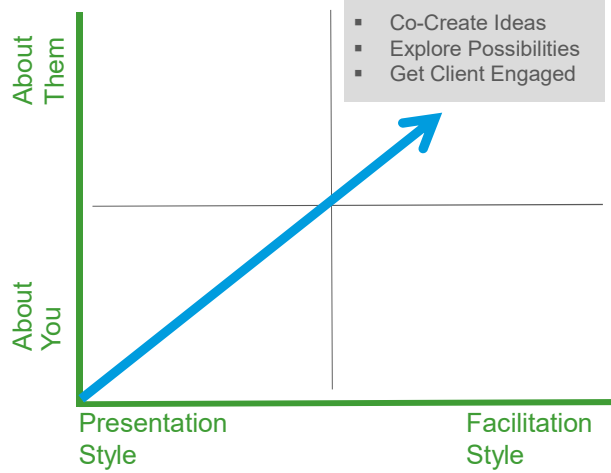
## What's your style?



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## What's your style?



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## How people work together

How have your stakeholder conversations changed since the onset of the COVID-19 crisis?



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## What's different?

It's more than just a "touch point".



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THINK  
about it

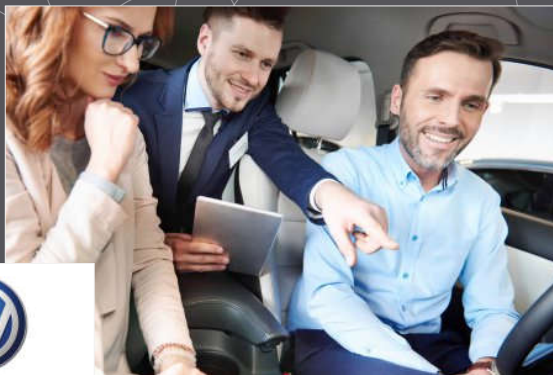
Would your clients characterize your meetings as traditional or distinctive?



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It's an Experience



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It's an Experience



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What are common **barriers** to collaboration you face?

How can you **minimize** them?



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- **Facilitation** skills
- Lack of **confidence**
- Intolerance of **ambiguity**
- Discomfort with **conflict**
- A **limited perspective** of problems and opportunities



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## It's an Experience

Key components of a facilitated session



Set the  
expectations  
for a working  
session

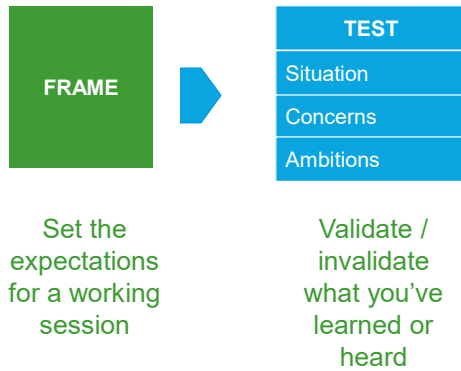


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## It's an Experience

### Key components of a facilitated session

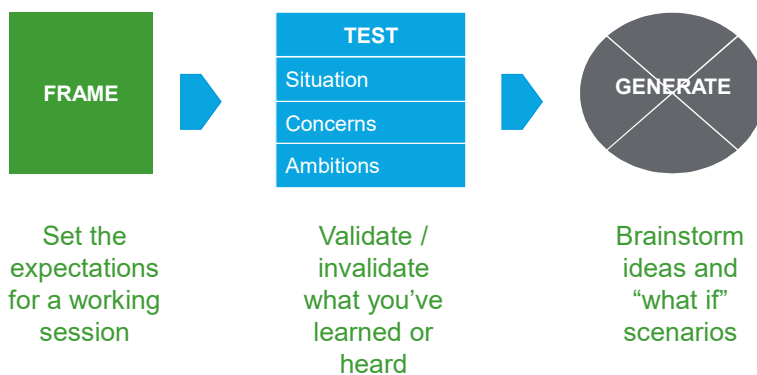


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## It's an Experience

### Key components of a facilitated session

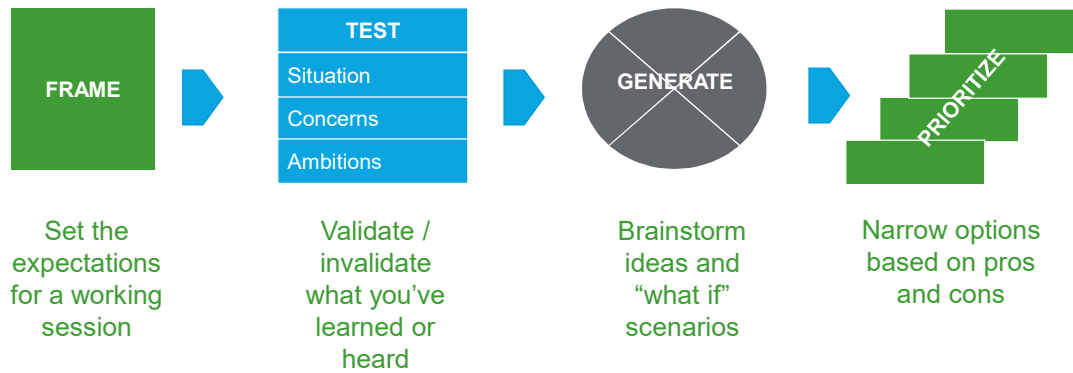


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## It's an Experience

### Key components of a facilitated session



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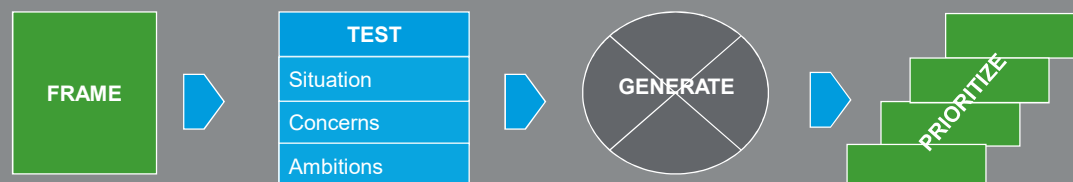


## Application Challenge

### On-Your-Own Assignment




**LEAD THE WAY** – Be intentional to guide your stakeholders through collaborative experiences.



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