



An event guide:

# Support candidates on the CPA Exam journey



# It takes determination, concentration and intent to tackle the Uniform CPA Examination.

The American Institute of CPAs' research shows that a firm's environment is a critical component of a candidate's success. By establishing a culture of support and encouragement for aspiring and newly licensed CPAs, you'll enhance your firm's reputation, better serve your clients and solidify your succession plan.

You can motivate your candidates and keep them on track toward attaining the CPA by planning simple events that will show your commitment to their development.

# Host a kickoff.

Set a positive tone from the start. Host an off-site retreat or, if your firm is on a budget, an informal breakfast or lunch to let candidates know your firm is behind them on their trek toward licensure. This is the time to find out where each candidate is on the exam journey, help them form study groups, discuss strategies for success, and introduce them to firm mentors who will offer guidance along the way.

Completing the exam generally is an 18-month journey. A retreat can boost candidates' morale, help them bond as a cohort and aid them in developing an exam study plan. It's an opportunity to highlight firm expectations. It's also a chance to show them the level of support they can expect from you, and the monetary rewards the CPA license can offer.

## Topics to discuss at the kickoff retreat:

- How your firm supports its candidates
  - Paying for review materials
  - Offering time to study in a group or individually
  - Rewards and recognition
- A sample plan to pass all four sections in the 18-month timeframe
- A reminder of the exam testing windows
- Time management strategies to balance work, study and personal commitments
- The best study resources, including how helpful study groups can be
- Thoughts/concerns/questions your candidates have about taking the exam

# Assign a mentor from your firm.

Pairing each candidate with a mentor within the firm shows support while also providing a direct line to someone who's recently taken the journey. This mentor can help guide the candidate through the process, provide answers and encouragement.



### Small firm tip

If you know of someone not associated with your firm who would be a great mentor, connect them with your firm's candidates.

# Schedule study halls.

Offer regular study sessions between test segments. Some firms coordinate in-house sessions with a paid review course provider.



## Small firm tip

Support your exam candidates with study halls to fit your budget and resources. Provide dedicated study space on set days. Consider providing study fuel such as coffee, candy or pizza as motivation.

# Encourage attendance at state CPA society events.

Schedule candidate group attendance at local state CPA society events. They'll build their network and networking skills and learn about what CPAs are doing across your state. Plus, they'll be more likely to engage in and volunteer for society events in the future.

## The end of the year is a great time to ask questions, such as:

- Have you scheduled your next exam section(s), and do you feel prepared?
- Where are you on your 18-month plan?
- How are your study groups working out?
- What kind of resources are you using to prepare?
- Do you feel you have a good balance of time to get your work done and study for the exam?
- Is there anything else the firm can do to help you?

# Plan check-ins strategically.

## ***Before the December holidays***

When the busy season is knocking at the door, your staff anticipates a heads-down culture for the next several months. Are you allowing CPA candidates flexible and/or dedicated time for exam prep? Use this check-in to get your staff motivated for what's ahead and ask them to plan strategies to stay on track.

## ***During busy season***

Busy season is crunch time for many exam candidates. They may be working more hours while trying to keep up with studying. How can your firm help? Make a point of holding short “scrum” meetings to give them that added push.

“Scrum” is originally a word used to describe software development teams as they collaborate on the next iteration of a product. It also describes the short but informative meetings that developers hold to update one another on project progress and current obstacles.

Spend some time learning what these busy season months mean for your candidates. Ask:

- How are you adjusting your exam study plans to account for additional time spent at work?
- Where are you on the exam journey? Are you struggling with a section?

## ***Four weeks before the testing window opens***

Show your candidates the finish line is closer than they realize. Think about asking a recently licensed CPA to talk with them to add an extra level of encouragement in the home stretch.

# Introduce the Examination Blueprints.

Do your CPA candidates know about the Examination Blueprints? They should. Schedule periodic check-in sessions to make sure they do. The Blueprints, located at [aicpa.org/examblueprints](https://aicpa.org/examblueprints), are valuable resources that show candidates the type of content and skills that will be tested. Reinforce the importance of this document with quick review sessions.

# Celebrate milestones and mini-milestones.

Eighteen months of intense studying is a long time, especially while juggling work and home life. Show your candidates you understand the challenges of their exam journey with events and rewards that mark their achievements along the way. Here are a few ideas to recognize effort:

- The first section passed: send a congratulatory letter, serve cake or reward with a gift card.
- The second section passed: give your candidate a day off, contract a massage therapist for chair massages, or give tickets to a favorite sporting event or concert.
- The third section passed: host an almost-there party, complete with three-quarters of everything celebratory (meet for 45 minutes; serve three-quarters of a cake instead of a full one; give your candidate a T-shirt that says “I’m  $\frac{3}{4}$  of the way to my CPA!”).
- The fourth and final section passed: firm-sponsored dinner to honor all successful exam candidates, including CPAs-to-be, family and firm personnel. Consider rewarding with a boost in pay or a one-time bonus.

## How do you acknowledge failure?

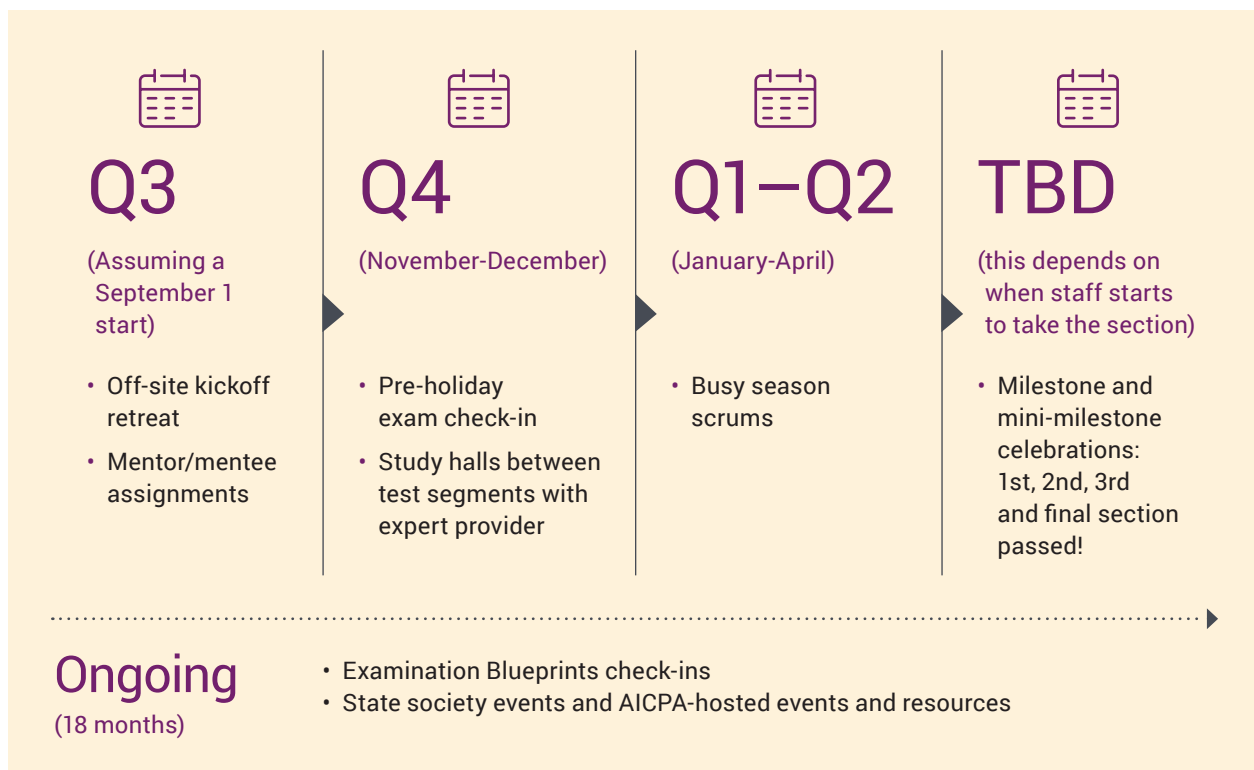
The Uniform CPA Exam is designed to be challenging, so only qualified individuals can earn a CPA license. In fact, depending on the section, only 45–53% pass the exam. The pressure is on exam candidates to complete four sections within the 18-month timeframe. Inevitably, one of your firm’s candidates will fail a section or two. But you can motivate them to keep going. While you may not want to celebrate a failure, you should acknowledge a setback and reinforce your support for a candidate who needs a boost. Pull them aside, remind them that failure is essential to growth, ask them what section they need to re-test and tell them that your firm is there to help them succeed.

Depending on your firm’s environment, a “get back on the horse” motivational lunch with a mentor may well be in order. Make sure you get the candidate’s buy-in and appropriately recognize their failed section attempt.

# Additional, along-the-journey ideas to keep candidates' spirits high:

- Consider anything small but thoughtful, such as movie tickets, an afternoon off work, pizza sent to exam study groups, a gift basket tailored to candidate's taste, purchase of exam study items, small inspirational-quote calendars or anything else that shows ongoing support. Some firms even post staff exam successes on their social media channels.
- If you have the budget, consider rewards that make a grand statement: perhaps the latest tech gadget like a new phone, smartwatch or TV when a candidate successfully completes the exam.

A key to your exam candidate's success is to keep the firm's encouragement flowing from the beginning of the journey to the end. Good luck!





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