



## ACC 261-1—Communications for Professional Accountants

Fall 2023 Syllabus (Discussion Draft Only)

Tuesday 1:10-5:00 PM Room GH 1213

*DISCLAIMER: This syllabus and the schedule of readings, assignments, and activities may be changed to maximize student learning needs and meet the course objectives.*

Effective communication skills are critical to professional success. "This is really the ability to clearly articulate your point of view and the ability to create a connection through communication." Holly Paul, PriceWaterhouseCoopers

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**Office Hours:** Thursday from 12:00 to 1:00 or by appointment. Please email me to schedule an appointment.

**Canvas:** Students are required to have access to Canvas throughout the course. Regular course updates, information and schedules are posted to Canvas. Grades are posted through the Canvas gradebook.

**Teaching Assistant:** TBA

### Required Texts and Preparation Materials:

- Text: **Everyday Business Storytelling**, Kurnoff, Janice and Lazarus, Lee (2021, Wiley); ISBN: 978-1-119-70466-9
- Text: **Simply Said**, Sullivan, Jay (2017, Wiley) ISBN: 978-1-119-28529-8
- Harvard Business Review Simulation Course Pack; details to be provided on Canvas regarding this purchase.
- A downloadable **TEXTPAK**, accessible on study.net.
- One Harvard streaming simulation will also be incorporated in your materials.
- I will also post, periodically, materials for you to read, view, and/or analyze prior to the session in which we will discuss it.

Please purchase the materials above prior to the first day of class. On Canvas and within this syllabus you will hyperlinks that guide you to additional readings and videos.

## **Course Overview and Learning Goals**

A key component to the accounting professional's success lies in their ability to communicate effectively in a way that provides clarity and influences decision-making. This is true regardless of where you ultimately land professionally, e.g., in a Big 4, national, regional or local firm, industry or government, to list a few. In this course we examine communication as a strategic tool that will be vital for your future success. Moving beyond simply teaching public speaking or business writing, my goal for this course is to help you achieve *writing and speaking skills* in a way that places you and your audience on the same frequency, enabling you to be effective and influential. We will also place an emphasis on structuring and documenting audit workpapers and reports, understanding your audiences (investors, creditors, regulators, and other stakeholders), and consideration of ethical and regulatory responsibilities.

## **Course Design**

To achieve these somewhat ambitious goals this course is designed with discussion modules and practical work on each Tuesday. You can expect the entire four-hour block to be interactive and engaging. To get the most benefit please come to class each week prepared and ready to engage with the professor and your peers. This course will enable you to develop professional communications skills for your upcoming career. You'll find numerous opportunities to express yourself in both writing and oral presentations. You'll also take a step forward in your powers of critical analysis, applying a critical thinking protocol.

## **Presentations**

A competent speaker brings a foundation of eight basic skills to a presentation. Students enter this class with some of these speaking skills, but others need to be learned. For instance, some students speak too quickly (and usually know it) because they're nervous. A coaching technique based on cognitive restructuring rapidly enables students to speak in presentations at an ideal tempo. You will also learn more advanced skills, such as having a commanding, confident presence. PowerPoint training will be folded in as well.

## **Writing**

Initial writing skills typically vary greatly within the class. The Writing Staircase is a series of six skill exercises. These enable everyone to advance their skill level. Actual business writing is often reviewed in class. Your writing challenges will often involve real or simulated business situations and case studies. You'll also create a situational memo similar to those in the BEC section of the CPA exam. Yes, it's a requirement for the CPA exam, so let's do this!!

## **Critical Analysis Series**

This component will enhance your ability to analyze business matters dispassionately and thoroughly. It is a collection of readings, exercises, and other challenges, chosen with an eye toward your future needs in the accounting field. What does it include? A protocol from the Foundation for Critical Thinking provides a helpful structure for analyzing complex matters. Insights from Nobel Laureate Daniel Kahneman will provide a real-world way of discussing how we think...and often don't. Numbers can mislead, so you will delve into bias, poor logic, and other challenges to sound analysis.

A+ = 97-100

A = 93-96

A- = 90-92

B+ = 87-89

B = 83-86

B- = 80-82

C+ = 77-79

C = 73-76

C- = 70-72

D+ = 67-69

D = 63-66

D- = 60-62

## Recommendation

Google “Purdue Owl” to reach the online Purdue Owl Language Lab; add this to your toolbar. It offers immediate consultation on grammar, spelling and more, and is especially valuable to ESL students.

I am a prolific Announcement “poster.” So, please keep an eye on Canvas and your email (assuming you have pushed Canvas announcements to your email).

## Your Guide to Course Communication

- **Sensitive, personal, or confidential matters** should be directed to my email address— or, of course, speak with me via phone or on a Zoom appointment. There are set office hours, but I also can, at your request, often arrange customized times that fit both of our schedules.
- **Grades** will be posted in **Gradebook** on Canvas. Approximately 1) 40% of your grade is allocated between your various individual and team presentations; 2) 40% of your grade is allocated between your various individual and team written submissions; and 3) 20% of your grade is allocated to attendance, participation, and contribution (see below) (including peer review/assessments of your contributions).
- **All assignments** can be found on the Syllabus and Assignments pages within Canvas. All written assignments are due on time, but dates could change (perhaps be pushed out due to guest speakers or other circumstances). At my discretion, I may deduct points for significant or repeated tardy submissions. Assignments should be uploaded to the appropriate dropbox in Canvas unless otherwise announced.
- **Student discussion groups** will analyze cases and take on other tasks including leading an informal discussion of assigned material.

**Attendance, Participation, and Contribution Factors:** Without question this will be a highly interactive course. In fact, it’s designed to be more about your learning than my teaching. To get the most out of it, you need to attend all the class sessions. But attendance is only the first step—while here you must participate. I hope you not simply participate (e.g. speak in class) but will also truly contribute by helping further class discussions and contribute to the learning of others. Anything I ask you to do which doesn’t specifically have a grade associated with it is considered a portion of your participation grade. I will use a mix of cold calls, warm calls, and volunteers to aid discussion.

It is best to avoid missing class. But if you choose to miss class (or a portion of class), I urge you to do so with the least amount of impact on your learning experience. The further in advance you notify me and the TA of your need to be absent, the less impact any absence will have. One pre-notified absence (48 hours or more in advance) will have no impact on your participation grade; a second absence will have a more pronounced impact.

If you must arrive late, do so with the least amount of interruption. If I am speaking, slip in quietly. If a guest speaker or a peer is presenting, wait outside the classroom until there is a logical break (e.g., applause) before entering. Laptops are rarely needed in this class. I will notify you in advance if they are necessary; otherwise, leave laptops closed during class. Cell phones, pagers, iPhones, buzz saws, and other distracting electronic devices fall into this same category.

**Please keep name placards visible during at least the first few classes and whenever we have guests.**

**Quizzes and/or In-Class Exercises:** Approximately 8 @ 6 points each = 48 points  
There is a minimum of three unannounced quizzes and five in-class discussion exercises. If we do not do them all (or we do more for which points are awarded), the grading scheme will be adjusted accordingly. The lowest of these will drop.

**Feedback and Grading in this Course:** You will quickly begin to see that I love being able to provide feedback on your communication, but am less enthusiastic about having to place a numeric score on your efforts. Yet, I recognize that in a university of UCD's caliber both components are needed. I do my best to provide a clear rubric for what's expected on each graded assignment. I grade you on how well you meet the factors of the rubric, not "how good of a speaker/writer you are" or "how much I liked what you delivered/wrote." When grades are assigned by the TA or grader, they are working on my instruction with the rubric provided.

**Rights and Responsibilities:** All participants in this course are expected to follow the UC Davis Principles of Community, which includes affirmation of the right of freedom of expression and rejection of discrimination. The right to express points-of-view without fear of retaliation or censorship is a cornerstone of academic freedom. A diversity of opinions with respectful disagreement and informed debate enriches learning. However, in this course, any expression or disagreement should adhere to the obligations we have toward each other to build and maintain a climate of mutual respect and caring.

Students are expected to abide by the University of California-Davis Code of Conduct found at <http://sja.ucdavis.edu/files/cac.pdf>. The Code of Conduct has explicit explanations of violations (e.g. plagiarism, cheating, unauthorized collaboration, etc.). Academic conduct violations will not be tolerated, and your instructor will not hesitate to turn violators over to Student Judicial Affairs. If you are uncertain about what constitutes an academic conduct violation, please refer to the code link or contact your instructor. There may be times where I will allow you to re-purpose your own material for a presentation or written assignment in this course, but I must know about this in advance of the assignment being submitted. Regardless, all work you submit must be original for this course or clear in its origination. If you have a question about an honor code issue the time to raise it is while you are preparing an assignment, not after. All material in the course that is not otherwise subject to copyright is the copyright of the course instructor and should be considered the instructor's intellectual property. Therefore, it is a violation of the Code of Conduct to post materials on other websites.

**Use of Artificial Intelligence:** While it should go without saying, I know better. So here it is. The use of artificial intelligence to prepare any written submissions for this course is absolutely prohibited. I reserve the right to verbally “examine” or test students on their submitted work to combat this issue if needed. Any student who submits AI generated materials for submissions in this course is subject to my discretion in terms of whether they will fail the course and all such students will be reported to the University administration—e.g. office of student affairs. Submitting AI-created work as one’s own is, fundamentally, dishonest. As a professional, I consider it among our top priorities to graduate individuals of character who can perform admirably in their chosen discipline, all of which requires a set of core beliefs rooted in honor. By remaining enrolled in this course, you are attesting that you will not engage in this practice and will abide by the honor code in place. There is a fundamental ethical problem with misrepresenting this type of material as your work, if you choose to attempt it, as well as the deeper problem of “cheating yourselves” by entering the workforce without adequate preparation for writing skills, a quality that employers highly prize. Count on counter measure BOTs and software to improve detection of this dehumanizing strategy to beat the system. Yes, it will always be a race but ask yourself, if tempted, who you want to be. Don’t ask AI to answer that question for you—it may get it wrong.

**Accommodations:** UC Davis is committed to educational equity in the academic setting, and in serving a diverse student body. If you are a student who requires academic accommodations, please contact the Student Disability Center (SDC) directly at [sdc@ucdavis.edu](mailto:sdc@ucdavis.edu) or 530-752-3184. If you receive an SDC Letter of Accommodation, submit it to your instructor for each course as soon as possible, at least within the first two weeks of a course.

**Safety and Emergency Preparedness:** UC Davis has many resources to help in case of emergency or crisis. While reviewing campus Emergency Information, you may want to register for UC Davis Warn Me and Aggie Alert, which will give you timely information and instructions about emergencies and situations on campus that affect your safety. If there is an emergency in the classroom, please follow my instructions.

**Student Wellness:** You are encouraged to practice self-care so that you can remain focused and engaged, which might mean getting a drink of water or leaving to use the restroom. Please be respectful of others by minimizing distractions when practicing self-care. Graduate education can be overwhelming at times but know that you are not alone if you’re feeling stressed. Please reach out for support if you need it. You can visit Virtual UC Davis to find resources related to health and well-being, academics, basic needs (food and housing) and more.

Now, together let’s take the elephant down one bite at a time...

Weekly Session Class Plan (tentative and subject to change based on class needs)

Date	Topic	Prep Work/Due Dates
9/26	<p>Syllabus Review, Getting Acquainted and Questions</p> <p>Overview of Communication: Verbal, Non-Verbal, Active Listening</p> <p>Discussion of Amy Cuddy: Your body language may shape who you are (TedTalk)</p> <p>In-class exercise and discussion: Introduction, Rewards and Risks of Using AI in the workplace or anyplace.</p>	<p>Purchase reading material, Ethics Game application</p> <p><b>1) Submit Personal Communication Assessment Baseline Memorandum (due 10/4 at 11:59PM)</b></p> <p>Begin Grammar Quiz (1) (Canvas) —due with passing score by week 5 (10/17 at 11:59PM)—unlimited attempts</p>
10/3	<p>Fundamentals of Oral and Written Communications;</p> <p>Discussion of TedTalk—Death By PowerPoint; Persuasive Writing; Strategic Storytelling</p> <p>In-class persuasive memo peer review and workshop</p> <p>Team Project Discussion and Teams assigned (approximately 3-4 students per team)</p>	<p>Read The Characters of the Story (Study.net Reading Prior to Class 10/3)</p> <p>Read Accountants as Communicators (study.net) prior to class on 10/6</p> <p>Read Everyday Business Storytelling Part 1-- Chapter 1: Meet the Brain Scientists 8, Chapter 2: Data (Yes, Sometimes Overused) Is Not the Villain 16</p> <p><b>2) Bring persuasive memo to class—peer review and workshop (10/3)</b></p> <p><b>3) Last day to submit persuasive memo (10/8)</b></p>
10/10	<p>Guest Speaker Mike Ueltzen –working with data</p> <p>Storytelling with Data Persuasive Presentations</p> <p>Creating compelling business documents and storytelling (cont.);</p> <p>Class discussion of TedTalk—Julian Treasure—How to speak so that people want to listen</p> <p>The Theory of Thin Slices Anchors</p>	<p>Read Everyday Business Storytelling Part 2</p> <p>Ok, I’m in—How Do I Get Started with Business Storytelling? 24</p> <p>Chapter 3: The Four Signposts 30</p> <p>Chapter 4: The WHY, WHAT and HOW of Business Storytelling 48</p> <p>Chapter 5: Your BIG Idea 52</p> <p>Chapter 6: Putting It All Together: Sample Story 56</p>

Date	Topic	Prep Work/Due Dates
10/10 cont.		<p>Read: The Theory of Thin Slices (Study.net reading prior to class on 10/12)</p> <p>Read: Anchors (Study.net reading prior to class on 10/12)</p> <p><b>4) Last date to submit completed Grammar Quiz no. 1 with passing score (10/15)</b></p>
10/17	<p>Individual presentations (Day 1) --persuasive presentation/argument about an attention-getting business policy or practice (student's choice) (three slides maximum)</p> <p>Peer review/feedback—persuasive argument</p> <p>Introduction to the Business Environment and Concepts memorandum</p>	<p>Read Everyday Business Storytelling Part 3 (reading prior to class on 10/19)</p> <p>Thanks, got the basics What Else Can Help Me? 60</p> <p>Chapter 7: Push Your Story Forward with Active Headlines 62</p> <p>Chapter 8: A Simple Path to Building Your BIG Idea 72</p> <p>Chapter 9: Five Well-Tested Ways to Visualize Your Story 80</p> <p><b>5) Submit individual persuasive presentation/argument presentation slides prior to class on 10/17</b></p> <p>Begin Grammar Quiz (2) (Canvas) —due with passing score by week 8 (10/31)—unlimited attempts</p>
10/24	<p>Finish individual persuasive presentations if needed (Day 2)</p> <p>Team Presentation topic selection and planning workshop (Topic: informative and interesting case study related to the profession of accountancy (must in part employ data visualization)</p> <p>Email and short writing workshop (tentative)</p> <p>BEC memo peer review workshop</p> <p>Peer review/feedback—Business Memo (BEC format)</p>	<p>Read Everyday Business Storytelling Part 4</p> <p>Let's see the magic! How Does Storytelling Show Up in Everyday Business? 106</p> <p>Chapter 10: Making a Recommendation 108</p> <p>Chapter 11: Providing an Update 144</p> <p>Chapter 12: Crafting an Email 162</p> <p>Chapter 13: Creating a One-Pager 176</p> <p><b>6) Last Day--Grammar Quiz (2) (Canvas) —due with passing score by week 8 (10/29)—unlimited attempts</b></p>

Date	Topic	Prep Work/Due Dates
10/24 cont.	<p>Guest Speaker—tentative</p> <p>Breakout groups—case study analysis</p>	<p>7) <b>BEC Draft Bring three Copies to Class (10/24)</b></p>
10/31	<p>Presenting in teams. Communication in the team environment.</p> <p>In class exercise—Simply Said (Sullivan). (Students who have not read the book will feel ill-equipped to participate). See Canvas for further information.</p>	<p>Deadline for reading Simply Said.</p> <p>Read Everyday Business Storytelling Part 5</p> <p>But wait! How Do I Flex My Story? 192</p> <p>Chapter 17: You’re Told “Only Three to Five Slides” 216</p> <p>Read Everyday Business Storytelling Part 5 (cont.)</p> <p>Chapter 18: Team Presentations: Who Does What? 220</p> <p>Chapter 19: When Your Audience Is Virtual 238</p> <p>8) <b>Submit Team Presentation Topic For Approval (10/29)</b></p> <p>9) <b>Last day to submit final BEC modeled business memo (10/29)</b></p>
11/7	<p>Team meetings and planning</p> <p>In-Class exercise Communicating with Diverse Audiences</p> <p>Mt Everest Simulation</p>	<p>Chapter 14: Audience Is Everything: A Manifesto 194</p> <p>Chapter 16: Your Audience Is Diverse. How Can You Please Everyone? 210</p>



Date	Topic	Prep Work/Due Dates
11/14	structuring and documenting workpapers and reports  understanding the CPA's audiences  ethical and regulatory considerations	<b>10) Last Day to submit Personal reflection on Everest Simulation (11/12)</b>
11/21	Thanksgiving Week—No Class	
11/28	Final Team Presentations on an informative and interesting case study or controversy/scandal in the news related to accountancy/accounting firm etc.	<b>11) All Team presentation materials and visual aids (e.g. PPT and handouts) due on 11/28 (before class)</b>
12/5	A challenge from the CPA exam's BEC section will end the class, with a limited amount of time to write an answer to a prompt.	<b>12) Turn in your final BEC format memo at the end of the challenge</b>