EY Center for Careers in Accounting and Information Systems

"Coffee Chats"

What is a Coffee Chat?

A "coffee chat" is an informal discussion with one or more firm professionals. The "meeting" can be in-person for coffee, tea, boba, breakfast, lunch, etc., or over the phone. In-person is recommended as it is more effective to be face-to-face.

What is the Purpose of a Coffee Chat?

A coffee chat is a networking activity; in other words, it is an excellent way to research - to learn more about the Accounting, IS and IT professions, employers, accounting and IS/IT-related positions and career paths, industries, government, and anything else that will help you make the best-informed career decision, both short and longer-term. A primary goal is develop a genuine rapport with the professional(s) and an overall relationship with the employer, so that you better know them and they better know you. It will improve your knowledge and understanding of the profession, the employer and the recruiting process, enhance your opportunities for interviews and ultimately offers, and help you with your decision-making process.

With Whom Should You Consider Meeting?

Ideally try to meet with professionals with employers and area(s) that interest you; if you do not know which area(s) interest you, meet with professionals in more than one to learn about each. You can start with people you've already met at various networking events. Then, if possible, try to meet with other CSUN alumni (you can find them on LinkedIn - see the LinkedIn guide), as they are potentially more likely to respond and meet with you; yet do not limit yourself to only CSUN alumni. Also, try to meet with professionals at different levels (i.e., new staff with some experience, managers, directors, partners, other execs) to gain different perspectives as their experiences will vary.

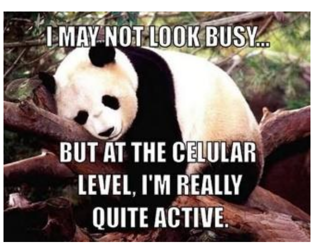
How Do You Reach Out to a Professional?

- Use email to make initial contact - if you do not already have the employer's email structure (i.e., first name.last name@), you can figure it out using internet search (see the LinkedIn guide on the EY Center website to search for email structure)
- Reach out to someone only twice - send the first email, and then wait 7 to 10 days before sending the second email.

EY Center for Careers in Accounting and Information Systems

"Coffee Chats"

- The Subject Line is important as professionals receive a lot of emails, so it can help if they know that you are a CSUN student or alum, and what is your interest in contacting them.
  - First Email - Subject Line: "CSUN Accounting/IS/IT Student (or Alum) interested in ------"
  - Second (follow-up) Email - Subject Line: "Follow-up: CSUN Accounting/IS/IT Student (or Alum) Asking for your Assistance"
- Email Content: Introduce yourself as a CSUN student (or alum), include your major and expected (or actual) graduation date, explain that you met them (and where/when), found them on LinkedIn or were referred by someone [include the name of the person(s) who referred you], express your interest in learning about the firm and specific practice or department, and ask if they would be willing to speak or meet with you at their convenience. Include that you look forward to hearing from them soon, and thank them for their consideration. In other words, be brief and straight to the point.
- Never express any impatience - always be nice and considerate. You are asking them for a favor, and should not have any expectations for them to respond and/or meet with you. Do not take it personally if someone does not respond - there are a lot of reasons such as they are really busy, lost your email, forget, etc.!
- If you don't get a response after 2 emails, try someone else.
- **Do NOT Attach your Resume** - you are networking (not job searching)!
- If you have any reluctance, start with a Staff level professional to get your feet wet and build your level of comfort.



What if They are too Busy to Meet?

If they respond but are very busy right now, be patient. Ask when might be a good time to meet (i.e., after busy season). As an alternative, ask if they have some time to briefly chat on the phone. If they do not want to schedule with you now/soon, thank them for responding, and ask if there is someone else with whom they would recommend for you to speak. Never push, never be rude, and never take it personally. If you are not getting any responses, look at what you are putting in the email Subject Line and in the email content. Are you being clear and specific? Are you being considerate of their time?

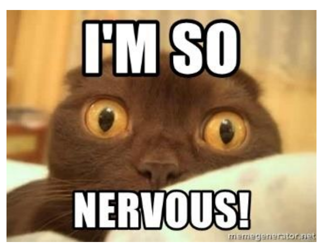
Where Should You Meet | Who Pays?

With their response, start by suggesting "coffee", and you can offer to pay if you do meet for "coffee" (tea, boba, juice, etc.). If they offer to pay, it's OK, and do thank them. If they suggest a meal (breakfast, lunch, dinner), do not assume that the professional will pay (although they generally do) - if they suggest meeting for a meal, let them know that you are a student on a limited budget. If they don't offer to pay upfront, either ask if they are planning to treat you, or suggest something less expensive such as "coffee". When you are not sure, it is best to ask nicely.

How to Prepare for a Coffee Chat?

Do your research about the professional (use LinkedIn especially - it's OK, you're not stalking them) and research to learn more about the employer (use the company website, GlassDoor, and other information on the internet). Prepare your questions (see below) based on what you want to learn, and remember that you initiated the coffee chat, and therefore, you should be guiding the conversation. This is not an interview, so do not expect the professional to take the lead. They will most likely ask you questions as well to get to know you - your background, your interests, your career goals, etc.

Ask the professional how you should dress if you are meeting in person - business professional or business casual. It is better to over-dress than under-dress; never show up in a t-shirt, shorts, flip flops, etc. This is not an interview, but you do want to make a professional impression.



How Do I Handle My Nervousness?

Do you know that most students (and alumni) will be nervous before even starting this process! Yes, there are students and alumni who have done "coffee chats", and they make it seem easy. But, it's not easy if you're generally "shy" and uncomfortable meeting someone you don't already know, or know well. It's normal and very common that you feel nervous. Like anything you have previously done that was a bit scary, such as a class presentation, the first time was the most difficult, but once you did it, it probably got a little easier each time. In this case, the hardest part is actually sending out the initial emails and then looking ahead to the meetings. Once you are there, you may be nervous for a few minutes, at most, but the nerves should dissipate because you have done your research and have prepared questions; remember that the professional agreed to meet with you, so they are wanting to be helpful and put you at ease. To start, thank them for coming and let them know you're looking forward to your conversation and learning more about them and their employer. Let them know you have prepared questions, and then get started. Once you ask the first question, they'll start talking, and your nerves will subside. The key (and biggest challenge) is taking that first step of reaching out by email.

EY Center for Careers in Accounting and Information Systems

"Coffee Chats"

Once you start getting responses, and do your first one or two coffee chats, it will get easier, more comfortable, more enjoyable and more beneficial!

How Long is a Coffee Chat?

Discuss and agree in advance with the professional how long they intend to meet with you. It is only at their discretion to continue the conversation beyond that agreed upon time-frame. Do not expect to spend more than the time to which they initially agreed, and always appreciate their time and interest throughout.

What Do You Discuss During a Coffee Chat?

A coffee chat discussion can cover a range of topics, including information about the employer, the professional's background and work, career path, career decisions and interests, the Accounting and/or IS/IT professions, as well as personal hobbies and interests, etc. (See sample questions below.) Do not ask questions about hobbies/interests unless the professional asks you first. Then, do so nicely. Prepare questions that are specific to your needs and interests. Don't ask questions you think you should ask - it is important that you actually are interested in their answers. ** Your questions should be driven by what you want to learn.

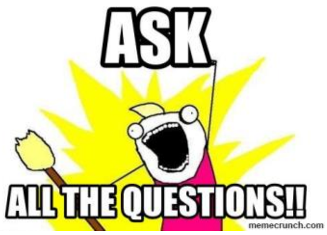
Close and Follow-up

Keep track of the time, and try to end at the time allotted. It is up to the professional to extend the meeting or conversation. Always express sincere appreciation for their meeting / speaking with you. Send a follow-up email (within 24 to 48 hours) to again thank them for their time, interest and support. Ask whom else they recommend for you to meet. Keep in touch and let them know (by email) of your progress with your career exploration and with the employer. If you have brief questions along the way, it is OK to send an occasional email to ask those questions. You should let them know when you apply for a position with their firm. Do not contact the professional too often - remember they are usually very busy and have a job to do. While you want to express your thanks and keep them informed as they have invested in you, you also do not want to be too needy or bothersome.

EY Center for Careers in Accounting and Information Systems

"Coffee Chats"

<u>Sample Questions to Ask:</u>



** Tailor your questions to the level of the person with whom you are meeting/speaking - each has a different level of experience, different role and set of responsibilities, and therefore, different perspective. They have also made difference career choices along the way. <u>Ask questions that are important (of interest) to you.</u> Do not ask questions just because you think you should.

Be Curious - ask more in-depth questions based on what the professional is sharing with you, and you want to learn more.

<u>For All Professionals:</u>

- Why did you select [practice area/department]?
- Why did you select [the employer]?
- How is the work assigned? What do you recommend if I have specific interests?
- What will I be doing when I start and after xx months?
- How does one gain the requisite experience to contribute at higher levels? What is the general / expected time frame?
- What challenges can I expect to face in my first few months? How can I avoid them, and/or overcome them?
- How does the employer handle mistakes made by staff?
- How does the employer support preparing for/taking the CPA exam, and/or other relevant certifications?
- How does the employer support continuing education (for license requirements and for advanced learning)?

<u>For Staff / Senior:</u>

- What did you do to recruit with the employer? What activities / events did you attend? With whom did you speak / meet?
- Please describe your transition into the firm (orientation and training, assignment to a buddy and a career adviser/mentor, work assignments, etc.). What went well? What obstacles did you face and how did you overcome them? What was different than what you expected?
- Please describe your actual work - what do you do on various projects?

EY Center for Careers in Accounting and Information Systems

"Coffee Chats"

- What is my expected learning curve, and how will my work change over 3, 6, 12 months, and 2 years?
- What does / did your buddy do to assist you?
- How involved is your career adviser? From whom else (besides your career adviser) do you seek advice and support and why?
- What is the typical day / week in this practice?
- What is it like during busy season? What was a typical work week? What was atypical? How did you handle the long hours and stress? What does the employer do to help you through busy season?
- How much turnover was there around you? How were you and your team affected?
- What are your mid- to longer-term career goals?
- What have you done so far to pass the CPA exam (or other certifications)?
- Do co-workers get together outside of work (and what do they do)?

<u>For Manager, Director, Partner/Principal (or other Senior Exec):</u>

- What do you do as a [manager / director / partner / other]?
- When did you know you wanted to become a [manager / director / partner / other]?
- How did each role match your expectations?
- What do you enjoy most about your position and the employer? Enjoy least?
- How did you achieve success? What mistakes did you make along the way, and how did you overcome them?
- If s/he changed course during their career (inside or outside of the employer), ask them how and why.
- Did you ever consider leaving? Why did you stay?
- What is my expected learning curve, and how will my work change over 3, 6, 12 months, and 2 years?
- What will it take for me to be successful? To get to the senior and manager level?
- How flexible is the employer to change practice areas or departments, clients, industries? Do I specialize and if so, when? How does one change practice areas or departments? What are the potential risks?
- What resources does the firm provide to support professional development and specific technical needs?
- What are some new initiatives / directions that the firm is pursuing or considering?