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?

Your goal is to learn more about the Accounting / IS professions, the firms/companies, various accounting and systems-related positions, career paths, industries/government, and anything else that will help you make the best-informed career decision, both short and longer-term. You should develop a genuine rapport with the professional(s) and an overall relationship with the firm/company, so that you know them and they know you. It will improve your knowledge and understanding of the profession, the firm 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 firms 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. If possible, try to meet first with CSUN alumni, 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.

How Do You Reach Out to a Professional?

- Use email to make initial contact (you can figure out email structure using internet search - i.e., first name.last name@ - see the LinkedIn guide on the EY Center website)
- Reach out to someone only twice - send the first email, and then wait 7 to 10 days before sending the second email.
- First Email - Subject Line: "CSUN Accounting/IS/CIT Student interested in ------"
- Second Email - Subject Line: "Follow-up: CSUN Accounting/IS/CIT Student Asking for your Assistance"
- Email Content: Introduce yourself as a CSUN student, your major, grad date, include GPA if very good, explain that you found them on LinkedIn or were referred by [name of referral source], 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. 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!

- 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. 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 find that you are not getting any responses, look at what you are putting in the email Subject line and the 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 - 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) and about the firm (use the company website, GlassDoor, and other information on the internet). Prepare your questions (see below), and realize that you are initiating and guiding the conversation. This is not an interview, so do not expect the professional to lead. They will ask you questions throughout, but in response to the direction of the discussion.

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.

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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 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 done that was a bit scary (i.e., class presentation), the first time is the most difficult, but once you've done it, it does get easier. In this case, the hardest part is actually sending out the initial emails and then looking ahead to the meeting. Once you are there, you'll be nervous for a few minutes at most, because you have prepared well, and you have a "script" to get you started. To start, thank them for coming and let them know you're looking forward to your conversation and learning more about them and their firm. 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. Once you've started getting responses, it will get easier!

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 firm, the professional's background, career path 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 are driven by what you want to learn.

Close and Follow-up

Keep track of the time, and try to end at the time allotted. Remember, it is only the professional's choice 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 the firm. 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 have a job to do, and perhaps others with whom they are meeting / speaking, too.

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<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. <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 [firm/company]?
- How does one gain the requisite experience to contribute at higher levels? How long does it take?
- How is the work assigned?
- How does the firm handle mistakes made by staff?
- What challenges can I expect to face in my first few months? How can I avoid them, and/or overcome them?
- How does the firm support preparing for/taking the CPA exam, and/or other relevant certifications?
- How does the firm support continuing education (for license requirements and for advanced learning)?

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

- What did you do to recruit with the firm? 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 career adviser, 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 each project?
- What is a typical assignment (length; breadth or depth)?
- How involved is your career adviser? From whom else (besides your career adviser) do you seek advice and support and why?
- What are your mid- to longer-term career goals?
- What is the typical day / week in this practice?
- What is it like during busy season?
- 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)?

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

- 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 did you achieve success? What mistakes did you make along the way, and how did you overcome them?
- 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 firm? Enjoy least?
- If s/he changed course during their career (inside or outside of the firm), ask them how and why.
- Did you ever consider leaving? Why did you stay?
- How flexible is the firm to change practice areas, clients, industries? Do I have to specialize and if so, when?
- What special 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?