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Course Information

Course Title: Coaching and Mentoring

#366225

Number of continuing education credit hours recommended for this course:

CPA: 3 (All states)

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

National Registry of CPE Sponsors ID Number: 107615.

Sponsor numbers for states requiring sponsor registration

Florida Division of Certified Public Accountancy: 0004761 (Ethics #0011467)

Hawaii Board of Accountancy: 14003

New York State Board of Accountancy (for ethics): 002146

Ohio State Board of Accountancy: CPE.51 PSR

Pennsylvania Board; PX178025

Texas State Board of Accountancy: 009349

Course Description

An organization's employees will be much more effective if they receive coaching and mentoring regarding their performance. The *Coaching and Mentoring* course provides the foundation concepts by describing how to develop a coaching and mentoring program. Topics covered include coaching models, the types of questions to use, how to issue feedback, session preparation, the different types of mentoring arrangements, and more. This course is a great starting point for inspiring employees and enhancing their performance.

Course Content

Publication/Revision date: 1/12/2025.

Author: Steven M. Bragg, CPA.

Final exam (online): Fifteen (multiple-choice).

Program Delivery Method: NASBA QAS Self-Study (interactive)

Subject Codes/Field of Study

NASBA (CPA): Personnel/HR

Course Level, Prerequisites, and Advance Preparation Requirements

Program level: Overview

Prerequisites: None

Advance Preparation: None

Instructions for Taking This Course

- **You must complete this course within one year** of purchase (If the course is “Expired,” contact us and we will add the latest edition of the course to your account (no charge).
- **To retain the course-PDF after completion (for future reference) and to enable enhanced navigation:** From “My Account,” Download and save the course-PDF to your computer. This will enable the search function (Menu: Edit>Find) and bookmarks (icon on left side of document window).
- **Complete the course by** following the learning objectives listed for the course, studying the text, and, if included, studying the review questions at the end of each major section (or at the end of the course).
- **Once you have completed studying the course** and you are confident that the learning objectives have been met, answer the final exam questions (online).

Instructions for Taking the Online Exam

- **Go to “My Account” and locate this course in your Active Courses list.**
- Click “View Course,” then “Course Exam,” then “Open Exam.” (You can print the exam questions for reference purposes using the “Print Exam Questions” link.)
- A passing grade of at least **70% is required on the exam** for this course.
- You will have **three attempts to pass the exam** (call or email us after three unsuccessful attempts for instructions).
- The exam is not timed, and it does not need to be completed in one session.
- Once you pass the exam, the results (correct/incorrect answers) and certificate of completion appear in “My Account.” A confirmation email is also sent.
- CFP Board and IRS credit hours, if applicable, are reported on Tuesdays and at the end of the month.

Have a question? Call us at 800-588-7039 or email us at contact@bhfe.com.

Learning Assignment & Objectives

- Identify the improvement areas targeted by coaching.
- Specify the difference between teaching and coaching.
- Recognize those situations in which coaching may not be accepted within an organization.
- Recall the contents of a coaching session.
- Specify the differences between open and closed questions.
- Identify the methods used to deal with silent employees.
- Recognize the characteristics of successful executive coaches.
- Recall the different types of mistakes that a coach can make during a coaching session.
- Identify the tools that an efficient and effective coach may use.
- Specify the ground rules for a mentoring relationship.
- Recognize the contents of a mentoring work plan.
- Recall the circumstances under which a mentoring arrangement should be terminated.
- Specify the indicators of a good potential mentee.
- Identify the behaviors of poor mentees.

About the Author

Steven Bragg, CPA, has been the chief financial officer or controller of four companies, as well as a consulting manager at Ernst & Young. He received a master's degree in finance from Bentley College, an MBA from Babson College, and a Bachelor's degree in Economics from the University of Maine. He has been a two-time president of the Colorado Mountain Club, and is an avid alpine skier, mountain biker, and certified master diver. Mr. Bragg resides in Centennial, Colorado. He has written more than 300 books and courses, including *New Controller Guidebook*, *GAAP Guidebook*, and *Payroll Management*.

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