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# BEYOND VALUATION

PROFESSIONAL DEVELOPMENT AND GROWTH CONFERENCE



## Wear the Shoes...and Other Lessons Learned

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## My History

- Grew up in Houston
- Went to college in Dallas
- Live in Houston with my husband and Ragdoll cat
- Internships – BVA, PwC
- Why I chose BVA



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## BVA Early Journey

- Dallas office only
- Opening Houston office
  - How I changed my look
  - How we got our name in the market
  - Association involvement, board involvement & lessons learned
- Becoming partner



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## Do's

- Always tell the truth
  - To your clients
    - Errors
    - Pushing too far?
    - Asking for something outside of your expertise?
  - To yourself (trust your gut...if that job feels like a bad one, it is)
- Under promise, over deliver
  - Don't be late, just be honest
  - Your word is your bond – be true to it



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## Do's

- Be responsive, even on client emails you don't want
  - My rule is to respond same day (or at worst within 24 hours), "email clearing"
- Take the time to develop the next gen
  - Mentor
  - Training
  - Give opportunities to grow
  - Own mistakes to the client and don't blame your team
  - Build team culture – make people want to work for you and respect you
- Be passionate about quality
  - Proofread
  - When reviewing, always assume the analysis is wrong and make it prove itself to you



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## Do's

- Stay curious, don't get complacent
- Take a genuine interest in people
  - Get to learn their stories
  - Treat all people with respect



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## Don'ts

- Make excuses
- Be late
- Lie – own up to mistakes
- Ignore emails or calls
- Get unnecessarily angry with team members
- Ignore team members who need help and don't make team members feel like they can't come to you with questions



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## Time to Get Personal – My Top 5

- Set lofty goals
  - Personally, I set the goal to be a partner within 10 years and buy first but not starter home before 30
- To be super successful, have to take risks
  - Calculated risks but risks all the same
  - Know and be comfortable with the worst case scenario before you take the risk





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## Time to Get Personal – My Top 5

- Quit apologizing and act like a man but with compassion
  - I never felt held back because I was a woman – I just sought more from my boss
  - You have to hustle for yourself – don't expect advancements and opportunities to just fall in your lap
- Be true to your word
  - If you tell a client you are doing x or something by x, do x or do something by x



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## Time to Get Personal – My Top 5

- Be true to yourself
  - I got promoted to VP super early (I was just 25) so I cut my hair and wore greys and blacks super boring shoes
  - Embrace your identity
    - For me – that's long red hair and bright shoes (designer high heels)
    - And yes, two tattoos
    - My clients know my work product will speak for itself



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## My Contact Info

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Reach out anytime!