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WELCOME TO YOUR NEW CPA2B BOOTCAMP PLAYBOOK

CPA2B Bootcamp is a virtual program designed to provide students with career resources and support while building awareness of TXCPA and their local chapter as their lifelong career advocates. At the conclusion of CPA2B Bootcamp, each attendee will have learned critical success skills for entering the workforce, more about the value of the CPA credential and how TXCPA can be a lifeline for them at any point in their careers. They will also meet local CPAs (virtually) who can provide continuing guidance. This virtual program is free and open to any level college student.

This playbook was developed to help you create a successful CPA2B Bootcamp virtual event. We've also put together a checklist to help guide you through event success.

TXCPA

FUNDING & ZOOM TIPS

FUNDING



Because this program will be virtual, sponsors will not be necessary. However, sponsors may be a good source for prizes for raffles or incentives. TXCPA can also assist with giveaways for these events. Collect winners' names, email and mailing addresses for TXCPA to send the prizes via mail or email depending on the offering.

REGISTRATION



TXCPA can handle the setup of event registration through their central platform, Netforum. When you have your event date, time and details, please send them to Rori Shaw at rshaw@tx.cpa.

zoomTIPS

A Zoom account is suggested for this program. If you don't have a Zoom account, please contact TXCPA to request access to a TXCPA Zoom account.



Host: If you use your own Zoom account, you will be the "host" for the event. You will have full control over the host controls such as starting a meeting, ending a meeting, recording, muting, etc. You are also able to give controls to a co-host (after you start a meeting). [Here is more information on host controls.](#)

•REC

Record: Start "record" for each session for later playback or to offer for students on your website. You can select to "automatically record" every session in your account. [Click here for instructions.](#)



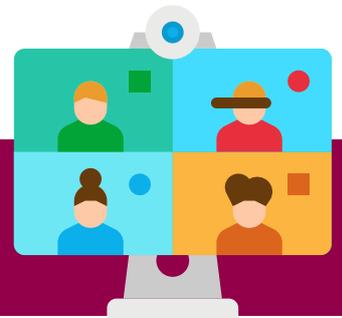
Breakout rooms: If you are going to offer breakout rooms, you will need to enable them in your account first. Once you enable them, you can [manage them](#) by creating them ahead of time or during the event.



AGENDA OPTIONS

ONE-DAY AGENDA

10:00 – 10:05 a.m.	Welcome
10:05 – 10:35 a.m.	Business Etiquette Skills & Dress for Success
10:35 – 11:15 a.m.	Resume Workshop Breakout
11:15 – 11:45 a.m.	The Pathway to CPA Credential: TXCPA State Board Update
11:45 – 12:00 p.m.	Interactive Networking Activity/ Break
12:00 – 12:30 p.m.	CPA Panel
12:00 – 12:35 p.m.	Wrap Up and Optional Raffle



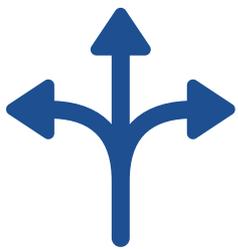
TWO-DAY AGENDA(SERIES)

DAY 1		DAY 2	
10:00 – 10:05 a.m.	Welcome	10:00 – 10:05 a.m.	Welcome
10:05 – 11:00 a.m.	Business Etiquette Skills & Dress for Success	10:05 – 11:00 a.m.	Pathway to CPA: TXCPA State Board Update
11:00 – 11:15 a.m.	Interactive Networking Activity/ Break	11:00 – 11:15 a.m.	Interactive Networking Activity/ Break
11:15 – 12:00 p.m.	Resume Workshop Breakout	11:15 – 12:00 p.m.	CPA Panel
12:00 – 12:30 p.m.	Dining Etiquette	12:00 – 12:30 p.m.	Q & A
12:30 – 12:35 p.m.	Wrap Up and Optional Raffle	12:30 – 12:35 p.m.	Wrap Up and Optional Raffle

SPEAKER SUGGESTIONS



Below are some suggestions for speakers for the CPA2B Bootcamp to get you started. Feel free to reach out to local "celebrities" who could fit the bill for many, if not all, of these topic areas. If you would like help finding speakers reach out to Rori Shaw at rshaw@tx.cpa.



Pathway to CPA:
TXCPA State Board

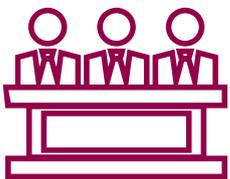


CPA Panel:

- Moderator CPA
- Industry CPA
- Public Practice CPA
- Government CPA
- Fraud/White Collar CPA
- Educator CPA

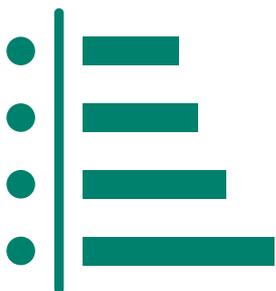
Business Etiquette, Dress for Success & Resume Workshop:

- TXCPA etiquette presentations available for use
- Robert Half or another local recruiter



Other Topic Suggestions:

- Acing the Interview
- Resume Writing
- Landing an Internship
- Communication Skills
- Critical Conversations
- How to Network



NETWORKING ACTIVITY IDEAS

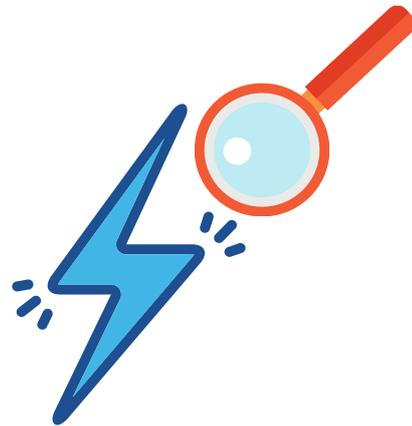
Below are some suggestions for networking activities to get you started. Feel free to leverage any activities that have worked for an abbreviated window at past chapter events.



Walk Up Song: Ask each participant what song they would play to walk into a room. Then, create a playlist to send to everyone after the event.

Lightning Scavenger Hunt: For Lightning Scavenger Hunts, create a list of items or characteristics. Then, on a Zoom call, challenge the students to gather the items and show them on screen to earn points. Here is an example of items to find:

- Something red
- Your favorite mug
- Whatever is in the pockets of your jacket
- Something you love
- A book that you enjoyed



CPA BINGO: Create a bingo card with CPA terminology (or use the cards developed through [StartHereGoPlaces.com](https://www.startheregoplaces.com)) or other words students might hear during the event. You could send the card ahead of time and they could play the whole time until someone wins.



Polling: Ask a series of fun questions and see what the results are through Zoom polling.

POSSIBLE MODERATOR QUESTIONS



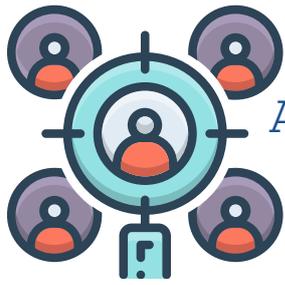
Feel free to provide your panel moderator, as well as your CPA panelists, the below list of questions at least a week prior to the date of the program for them to prepare and ask any questions.



IDEA: Create and send a google form to registrants two weeks prior to the program to collect questions they would like to ask panelists. Send questions a week prior to the panel.

- Where did you go to school, what degrees do you hold and when did you receive them?
- Why did you choose the accounting career path?
- What was your first accounting job?
- Did you have an internship?
- What advice would you give students to help them make the most of their internships?
- What opportunities have you had in this field?
- What was the first position for which you were hired for your professional knowledge, and how did you locate that opportunity?
- What does a typical day look like for you?
- What are the best parts of your job?
- What do you (or your firm or company) expect from new hires in regard to:
 - Their participation in team projects?
 - The overlap with personal time and business time?
- If you have ever interviewed job candidates, what is the funniest, most outrageous thing you've ever heard in an interview?
- How has the CPA given you an edge?
- How many times did you take the exam before you passed, and when did you receive your license as a CPA?
- What tips would you give students for managing their time between school, work, family and preparing for the exam?



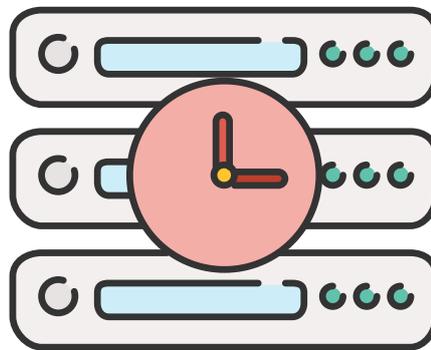


Audiences:

- Students
- Educators/University Contacts
- Faculty & Campus Ambassadors (see list)

Mediums:

- Emails
- Flyers
- Social Media
- Word of Mouth



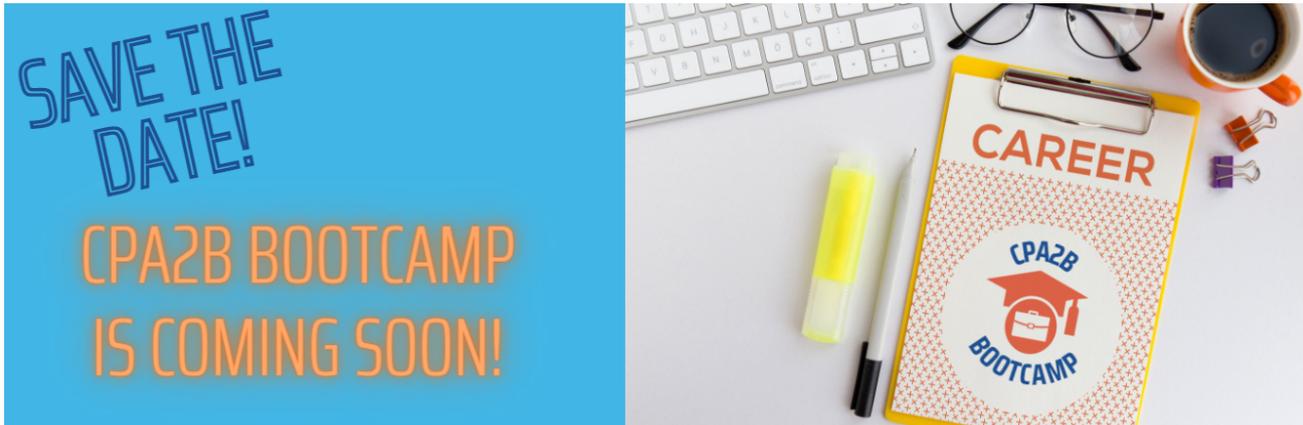
Timing:

- Save the Date announcement - ASAP
- Announcement (6-8 weeks prior to the event)
- Reminder (2 weeks post announcement)
- Reminder (4 weeks post announcement)
- Optional Reminder #3 (6 weeks post announcement - if you have an 8-week promotion window)
- Final Call (week prior to the event)
- What you need to know (2-5 days prior to the event)
- Thank you for attending, reintroduce benefits of student membership and promote additional student offerings

MARKETING TEMPLATES

Student Save the Date (ASAP):

Email Header:



Subject: Save the Date: You're Invited to [Insert Chapter Name's] CPA2B Bootcamp

Copy: Join us virtually [insert date] to learn more about your future career, taking your resume to the next level and harnessing the power of certification! Hear from CPAs who have been where you are now and learn tips on how to excel in the field. Attendees will experience:

- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Mark your calendar now! More information on how you can join your peers and fellow [chapter name] members for the CPA2B Bootcamp will be sent soon!

Social Post:

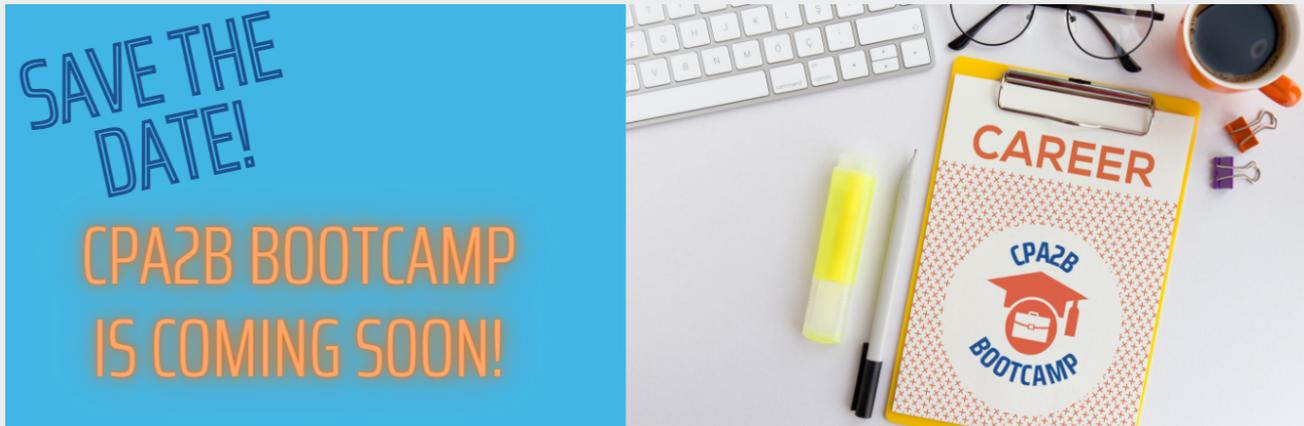
Save the Date: You're Invited to [Insert Chapter Name's] CPA2B Bootcamp on [insert date]. Stay tuned for information on how to jumpstart your future career success!



MARKETING TEMPLATES

Educator/University Contacts Save the Date (ASAP):

Email Header:



Subject: Save the Date: Your Students are Invited to [Insert Chapter Name's] CPA2B Bootcamp

Copy: Have your students join us virtually [insert date] to learn more about their future career, taking their resume to the next level and harnessing the power of certification! They will hear from CPAs who have been in their shoes and learn tips on how to excel in the field. Attendees will experience:

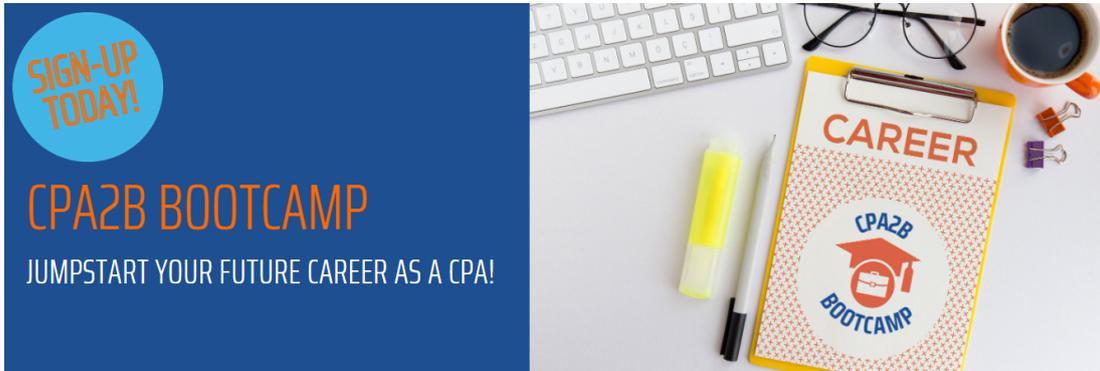
- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Mark your calendar now! More information on how your students can be a part of the CPA2B Bootcamp will be sent soon! In the meantime, feel free to spread the word and send along this attached flyer [flyer can be accessed via the google drive] with more information.

MARKETING TEMPLATES

Student Announcement (6-8 weeks prior to the event):

Email Header:



Subject: Jumpstart Your Career: Sign-up Today for [Insert Chapter Name's] CPA2B Bootcamp

Copy: Join us virtually [insert date] to learn more about your future career, taking your resume to the next level and harnessing the power of certification! Hear from CPAs who have been where you are now and learn tips on how to excel in the field. Attendees will experience:

- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Sign-up today and join your peers and fellow [chapter name] members for this one-of-a-kind experience.

Social Post:

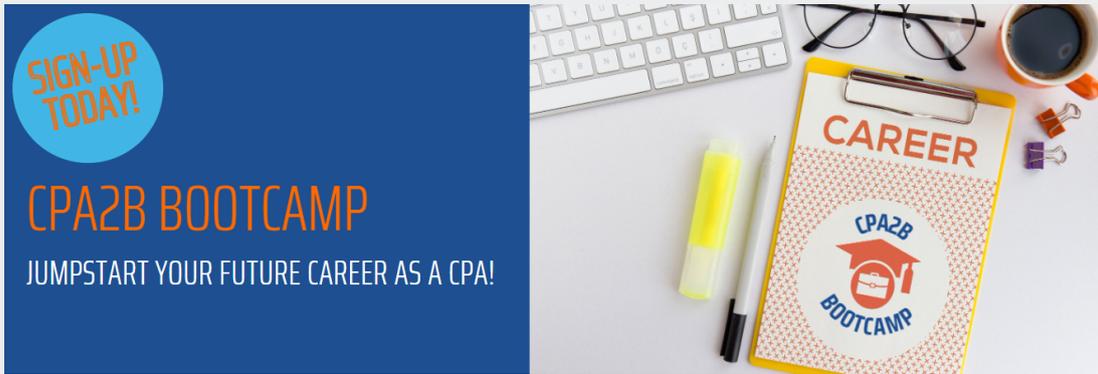
Jumpstart your career as a future CPA by being a part of [Insert Chapter Name's] virtual CPA2B Bootcamp on [insert date]. Don't miss this one of a kind event!



MARKETING TEMPLATES

Educator/University Contact Announcement (6-8 weeks prior to the event):

Email Header:



Subject: Jumpstart Their Careers: Students Can Sign-up Today for [Insert Chapter Name's] CPA2B Bootcamp

Copy: Encourage your students to join us virtually [insert date] to learn more about their future career, taking their resume to the next level and harnessing the power of certification! Attendees will experience:

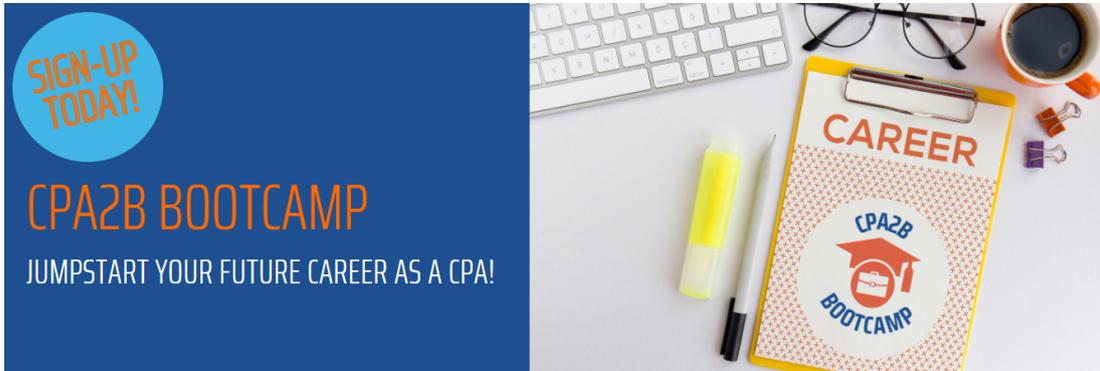
- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Students can sign-up today to join their peers and fellow [chapter name] members for this one-of-a-kind experience. Feel free to spread the word and send along this attached flyer [flyer can be accessed via the google drive] with more information.

MARKETING TEMPLATES

Student Reminder (2 weeks post announcement):

Email Header:



Subject: Sign-up Today for [Insert Chapter Name's] CPA2B Bootcamp

Copy: Don't miss [Insert Chapter Name's] virtual CPA2B Bootcamp [insert date] for an opportunity to learn more about your future career, take your resume to the next level and harness the power of certification! Attendees will experience:

- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Sign-up today and join your peers and fellow [chapter name] members for this one of a kind experience.

Social Post:

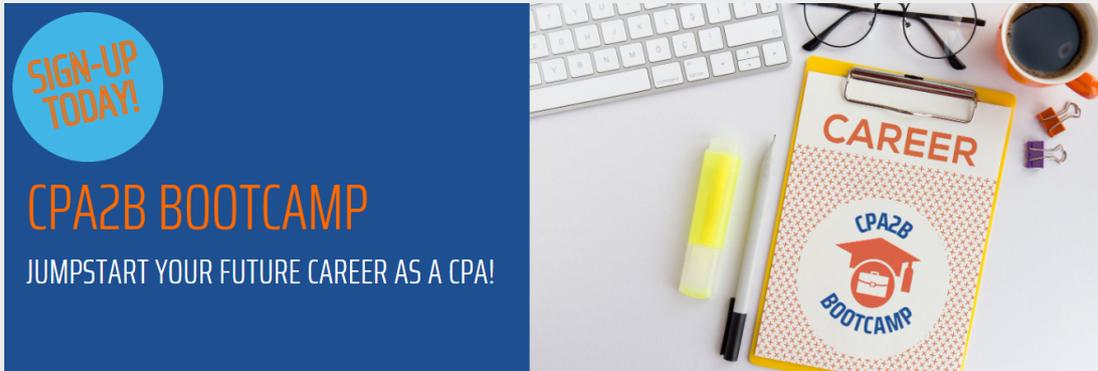
Don't miss [Insert Chapter Name's] virtual CPA2B Bootcamp on [insert date] to jumpstart your career as a future CPA. Sign-up today!



MARKETING TEMPLATES

Educator/University Contact Reminder (2 weeks post announcement):

Email Header:



Subject: Spread the Word: [Insert Chapter Name's] CPA2B Bootcamp is [Insert the date]

Copy: Don't miss the opportunity for your students to attend [Insert Chapter Name's] virtual CPA2B Bootcamp [insert date] to learn more about their future career, take their resume to the next level and harness the power of certification! Attendees will experience:

- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Share the registration link below and pass along the attached flyer to anyone who may be interested in jumpstarting their career with this one-of-a-kind experience.

MARKETING TEMPLATES

Optional Student Reminder (6 weeks post announcement - if you have an 8-week promotion window):

Email Header:



Subject: Still Time to Jumpstart Your Career at [Insert Chapter Name's] CPA2B Bootcamp

Copy: Don't miss [Insert Chapter Name's] virtual CPA2B Bootcamp [insert date] for an opportunity to learn more about your future career, take your resume to the next level and harness the power of certification! Attendees will experience:

- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Sign-up today and join your peers and fellow [chapter name] members for this one of a kind experience.

Social Post:

Still time to sign-up for [Insert Chapter Name's] virtual CPA2B Bootcamp on [insert date] to jumpstart your career as a future CPA.



MARKETING TEMPLATES

Final Call for Students (week prior to the event):

Email Header:



Subject: One Week Until [Insert Chapter Name's] CPA2B Bootcamp - Sign-up Today!

Copy: Last chance to experience [Insert Chapter Name's] virtual CPA2B Bootcamp on [insert date] to learn more about your future career, take your resume to the next level and harness the power of certification! You will experience:

- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Don't miss this one-of-a-kind experience to learn from fellow [chapter name] members and network with your peers. Sign-up today!

Social Post:

Last chance to sign-up for [Insert Chapter Name's] virtual CPA2B Bootcamp on [insert date] to jumpstart your career as a future CPA.



MARKETING TEMPLATES

Final Call for Educators/University Contacts (week prior to the event):

Email Header:



Subject: One Week Until [Insert Chapter Name's] CPA2B Bootcamp!

Copy: Last chance for your students to sign-up and experience [Insert Chapter Name's] virtual CPA2B Bootcamp on [insert date]. They will experience:

- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Feel free to send along the attached flyer, maybe offer some extra credit for attending and have them register via the link below! We hope to see your university represented and appreciate your help with getting the word out about this awesome event.



IDEA: Potentially spotlight the universities with attendees on a slide during the bootcamp, via social media and/or in a thank you email.

MARKETING TEMPLATES

What You Need to Know (2-5 days prior to the event):

Email Header:



Subject: It's Almost Time: Now Let's Get CPA2B Bootcamp Ready!

Copy: You're in! Now let's make sure you make the most of the upcoming [Insert Chapter Name's] virtual CPA2B Bootcamp [insert date]. To prepare, we put together a few reminders and tips below:

- Make sure you are camera-ready to help with engagement
- Dress for success - you may be networking with a future employer
- Upload the latest version of your resume for review in this google drive [insert link]
- Have questions? Add them here [insert link to google form] so speakers can prepare in advance
- Ask your questions by going off mute (stay on mute otherwise to avoid background noise)

We look forward to seeing you virtually real soon. If you have further questions, feel free to reach out to XX [insert chapter contact's email].

MARKETING TEMPLATES

Thank you to students for attending, reintroduce student member benefits and chapter events:

From: Chapter representative's email address

Image: Snapshot of zoom attendees but not necessary to have an image for this communication

Subject: Thank you for attending [Insert Chapter Name's] CPA2B Bootcamp!

Copy: We can't thank you enough for being a part of the CPA2B Bootcamp. We hope the experience will fuel and prepare your journey to certification and career success. Please take a moment to complete this short evaluation [insert link to a google form] to help us improve the experience and program in the future.

We are excited to have you as a TXCPA student member and look forward to being your career advocate now and into the future. Be sure to make the most of your membership by taking advantage of:

- Future chapter student events [include any specific details for events here]
- Scholarships opportunities
- CPA Exam prep course discounts
- Free access to Thomson Reuters' [Practice Ready Online Learning Program](#)
- Connection with your peers and 28K Texas Society of CPA members via:
 - TXCPA Exchange, exclusive members-only online forum, for questions and knowledge sharing
 - Searchable online directory
- Dedicated communications and resources to keep you up-to-date on critical professional news
- [Student Ambassador](#) program to help spread the news of TXCPA membership on your campus

If you have further questions, feel free to reach out to XX [insert chapter contact's email] or [Melinda Bentley](#) at the Texas Society of CPAs.



IDEA: Include an opportunity in the evaluation for them to provide a testimonial that could be shared via social media after the event and used for future year's event emails.

Social Post Suggestion:

Image: Post pic of zoom window with attendees

Copy: Our virtual CPA2B Bootcamp was held XX [insert date of program] with [insert # of attendees, # of schools represented] hopeful future CPAs ready to jumpstart their career! We look forward to all they will be able to accomplish as the future of the accounting profession.

MARKETING TEMPLATES

Thank you to educators/university contacts for helping!

From: Chapter representative's email address

Image: Snapshot of zoom attendees but not necessary to have an image for this communication

Subject: Thank you for helping make the [Insert Chapter Name's] CPA2B Bootcamp a success!

Copy: We can't thank you enough for encouraging your students to attend the CPA2B Bootcamp. We hope the experience will further fuel and prepare them for their journey to certification and career success.

We are excited to have your students as TXCPA members. If some of your students were unable to attend and would like to become members, it's free! All they have to do is [sign-up here](#) and they gain access to benefits like these:

- Future chapter student events [include any specific details for events here]
- Scholarships opportunities
- CPA Exam prep course discounts
- Free access to Thomson Reuters' [Practice Ready Online Learning Program](#)

If you are not currently an educator member, we encourage you to look into becoming an Educator ambassador which comes with a special dues rate and free registration to the annual Accounting Education Conference. [Find out more here!](#)

If you have further questions, feel free to reach out to XX [insert chapter contact's email] or [Melinda Bentley](#) at the Texas Society of CPAs.

Again, thank you for all you did to help with this event and all you do for the future of the profession!

MARKETING TEMPLATES

Flyer: Without date/Registration Information - could be added via email or through adobe.
Link to Flyer: XX



**SIGN-UP
TODAY!**

CPA2B BOOTCAMP

JUMPSTART YOUR FUTURE CAREER AS A CPA!

Join us virtually to learn more about your future career, taking your resume to the next level and harnessing the power of certification! Hear from CPAs who have been where you are now and learn tips on how to excel in the field. Attendees will experience:

- An open Q&A session with a panel of CPAs
- A hands-on workshop to level up your resume game
- Networking tips and tricks to wow future employers and clients
- An update on what your path to CPA will look like

Sign-up today! Join your peers and fellow chapter members for this one-of-a-kind experience.



VIRTUAL CPA2B EVENT CHECKLIST

Below is a snapshot of the CPA2B virtual event checklist, as well as a link to the editable version for tracking [insert link]. You can use the checklist to keep track of items needed for the event, timing required for completion and when to ideally send corresponding communications about the event. All this to help make the coordination and execution of the event as easy as possible!

Virtual CPA2B Event Checklist

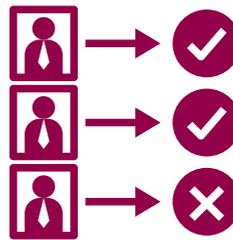
TASK	PRIOR	STATU	START DATE	DUE DATE	% COMPL	NOTES
Set up Zoom account or request from TXCPA	Normal	Not Started	12/25/2020	1/1/2021	0%	
Decide on 1 or 2 day event	Normal	In Progress			0%	
Select date(s) for event	Normal	Complete			0%	
Contact speakers to confirm their schedule	Normal	In Progress			0%	
Send Educator promo	Normal	In Progress			0%	###
Outreach to faculty & student ambassadors in your area	Normal	In Progress			0%	
Send Announcement to students	Normal	In Progress			0%	6-8 weeks prior to event
Social post - Announcement	Normal	In Progress			0%	
Send Reminder email #1 to students	Normal	In Progress			0%	2 weeks post announcement
Social post - Highlight session topics	Normal	In Progress			0%	
Send Reminder email #2 to students	Normal	In Progress			0%	4 weeks post announcement
Social post - 5 reasons to attend	Normal	In Progress			0%	
Send Reminder email #3 to students	Normal	In Progress			0%	6 weeks post announcement
Social post - Testimonies from previous attendees (if applicable)	Normal	In Progress			0%	
Send Final Reminder to students	Normal	In Progress			0%	Week prior to event
Social post - Last call	Normal	In Progress			0%	
Send What You Need to Know email to registrants	Normal	In Progress			0%	2-3 days prior to event
Thank you to participants	Normal	In Progress			0%	2-3 days after the event

[Download a checklist here.](#)

DON'T FORGET THE METRICS

To ensure success is measured for Bootcamp and be able to report our reach think about the following:

- Number of student registrants
- Number of schools represented
- Number of new student members
- Incorporate an evaluation prior to the program on their understanding of the profession
- Send a follow-up after the program to gauge their awareness/interest after the program



YOU'RE PREPPED & READY!

We hope this playbook will lead to a successful program for all hopeful future CPAs and for your chapter. Please don't hesitate to reach out if you require additional assistance!

Melinda Bentley, CAE
Director, Marketing and Communications
Texas Society of CPAs
(800) 428-0272, ext. 8579
mbentley@tx.cpa

