



# SDSU Student Accounting Society

## Meeting Minutes: KPMG - How to be a Successful Intern

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**Presenters:** RJ Vasile, Allison Newman, Courtney Strong, Amanda Daghaly - Audit Associate, RJ Vasile - Audit Associate. Sarah Kramer - Audit Associate, Nura Galang - Tax Associate, Courtney Strong - Tax Senior Associate, Gisel Chavez-Vega - ACE Associate (Advisory)

### Presentation:

Allison Newman --

- Internship: The first step to your successful career
- No intern not end all be all
- “You never get a second chance to make a good first impression”
- What type of person will you be?
- Starts on Day 1
- Continues for 365
- Always building your Brand
- Build a great brand, not a bad one
- 10 attributes
  - Excel through questions
    - Why do we not ask questions
    - Sounds like we don't know what you're doing
    - Schoolwork build background but will not be what's commonly seen in work
    - Questions are expected
    - Does NOT indicate lack of knowledge
      - Quiet intern is scary intern
    - Saves significant time
      - Don't waste time just staring at the project
    - Use questions to
      - Clarify an assignment
      - Check understanding
      - Learn in cases where the subject matter is new
    - Apply knowledge learned to next project
  - Play by the house rules
    - Understand office policies and procedures
      - Dress code
      - Use of telephones/Facebook

- Expected working hours
    - Other policies
  - Never try to take advantage of or abuse the privileges inherent in the system
  - Understand what to do with “down-time”
    - What do you do between projects
      - Training sites
      - Ask other people for work
- Quality counts
  - Quality work over efficiency
  - Do it RIGHT the first time
- Communication
  - Work appropriate
    - Clear, concise, and business-related
  - Spell check
  - Business language
    - Know your audience
    - No casual abbreviations for safety
  - Respond regularly
  - Be certain as to who you are sending to
  - - Reply vs. Reply all
    - Know what’s in your email chain
- Voicemail
  - Professional and current greeting
  - Leave concise messages
  - Return calls within 24 hours or less
- Telephone
  - Answer calls professionally
  - Call vs email
  - Pleasant and courteous at all times
  - With texting, be wary of work hours
  - 9:00-5:00 M-F best time for text and response
- Professionalism
  - Be aware of your surroundings
  - HOT Topics = No-no
  - No politics needed
  - DON’T take performance feedback personally
    - Meant for betterment
  - Don’t let problems fester
    - Talk through problem with person or mentor
- Team Player
  - Trust -- Earn team’s confidence

- Be courteous to ALL
  - Learn from EVERY task and seek out knowledge
  - Look for opportunities to offer assistance
    - Good for getting into fields of interest
  - Share the credit
    - Team job not individual job
- Set goals
  - Have a vision
  - Set measurable objectives and expectations
  - Be proactive -- show initiative
  - Do your homework
    - Speak with supervisors and peers
- Underpromise/Overdeliver
  - Don't over promise
    - Prioritize certain things over others
  - Deliver on promises you make
  - Procrastination adds stress to you and your team
  - Prioritize and meet deadlines
  - Go above and beyond
- Expand your circle
  - Meet people from every practice
  - Practice strong networking skills
    - Attend
    - Remember
    - Follow up
    - Core group of fellow interns will be strongest bond
  - Engage
- Attitude is everything
  - Good/bad attitudes are both contagious
    - Which one do you want to catch
  - A positive attitude makes even the most tedious tasks more bearable
  - Positive attitude = X Factor

**Questions:**

- Does KPMG have a full-time audit position open? (AJ - BAP)
  - None for this point in time
  - Stay tuned for future
- How does reviewing and learning from the last completed project sound? (Stephen)
  - Walking the halls, saying hello, goes a long way
  - Build your network in your down time
  - Intern has schedule of clients
    - Sometimes changes
    - Mostly set in stone

- Learn your clients - website, financial statements, etc.
- Amanda Daghaly, Audit Associate
- RJ Vasile, Audit Associate
- Sarah Kramer, Audit Associate
- Nura Galang, Tax Associate
- Courtney Strong, Tax Senior Associate
- Gisel Chavez-Vega, ACE Associate
- What type of training you receive as an intern
  - RJ
    - You are training when your working
    - Debrief
    - Flown to Orlando
    - Get comfortable
    - Get put into your job
    - Constantly Learning
  - Sarah
    - Go to Lake House
  - Allison
    - Own room
    - Do training in Lake House
- How do you best network with other practices, or outside your bubble, when it is still a virtual setting?
  - Sarah
    - Slightly difficult because of virtual world
    - Exposed to all other industries
    - Become friends with everyone
    - Message people
    - Chat with people
    - Talk to everyone, even those in other practices
  - Allison
    - Intern group met as a whole
    - Still had social events
- What was your biggest takeaway from your internship experience or an important lesson you learned?
  - Gisel
    - Not sure of what she wanted
    - See both sides of audit
    - Choose Advisory if you don't know what to do
  - Courtney
    - Asking questions is key
    - Appreciate all the questions
    - Admit when you don't understand
- How did having a mentor or career advisor help you in your internship?

- RJ
  - Transitional coach -- Ask questions you are uncomfortable with
    - Get into friend groups
    - Ask when someone is worried about something
    - Mentor is best friend
  - PML -- Best lifeline
    - Manager assigned in similar way
    - First person to reach out to you
    - Make your KPMG life better
    - Allowed up to 4 mentors
    - You can pick your mentors
- Allison
  - Look at who you want to become and have people like those be your mentor
  - Ask for mentor's thoughts
- How has the pandemic changed how you work?
  - Allison
    - How has it not changed?
    - Daily life was uprooted
    - Capability to do work virtually
    - Interaction has changed
    - Can't see people in person
    - Microsoft Teams
    - Virtual everything will have to do
- What are some of the industries that KPMG focuses on?
  - Nura
    - Insurance (9/15)
    - Corporation
    - Denver Clients
    - State/Local Tax Groups
  - Courtney
    - Biotech
    - Real Estate
    - Hotels
    - Developing drugs, COVID testing
  - Gisel
    - Two
    - Internal audit
    - Technology
    - Financial Services
    - Energy fuels
  - Amanda
    - Tech (Private)

- Pharmaceuticals (Corporate)
    - Allison
      - Clients in almost every industry
  - What was the biggest surprise from the whole internship process?
  - What was one thing you wish you knew in college?
    - RJ
      - See Sarah
    - Sarah
      - Everyone feels the same way
        - Nervous
        - Out of place
      - Everyone went through same thing you did
      - Don't need to know everything from Day 1
      - No unnecessary stress
    - Allison
      - Question is not unique
        - You have it = Someone else has it
      - Use your peers for questions
      - Sit down and study for that CPA exam
        - Get some of the tests done
        - Sign up for the exam
        - Get everything needed from college
        - CPA will not go anywhere
  - What was the biggest surprise from the whole internship process?
    - Amanda
      - Everyone is super nice
      - Everyone is open-minded
      - Ask questions and get work done properly
      - Can walk step-by-step
      - Set up for success
    - Allison
      - One day, you will teach someone
      - Internship leads to Full-Time Offer
      - Risk of not getting internship = Sit-down talk and chance to turn things around
    - Nural
      - Learn so much
  - What is the biggest piece of advice you would give to a student going through or preparing to start the recruitment process?
    - Allison
      - Engagement
      - Stay on time
      - Get questions answered ahead of time

- Overcoming hurdles at work
  - Gisel
    - Balancing time between two clients
    - Keep communication open with managers
  - Courtney
    - Scheduling
    - Everything gets pushed back
    - Reach out to PML
    - Not your job to schedule yourself
    - Help with managing time
  - Allison
    - Advocate for yourself
- Internship structure
  - Sarah
    - 8-10 weeks
    - Treated as first-year associate
    - Assigned to team
    - Report to senior typical
    - Hours are given
    - Sit down with senior
    - 1-2 examples with you
    - Problem comes up -- Senior sits by you
    - Change day-to-day
    - Have back up
- Clients -- Local and non-local
  - Sarah
    - LA client
    - Remote
    - Supposed to fly to Nashville
  - Nura
    - Almost all clients are in LA
    - Only one client in San Diego
  - Courtney
    - Occasional Availability basis
    - Chicago
    - Phoenix
  - Allison
    - Orange County has financial services
    - COVID = No restrictions on who can work with who
    -
- Goal settings
  - RJ
    - Meeting people, expanding my network

- Impress others and gain trust from others (not upset anybody)
    - Allison
      - Help with goal setting from PML
        - Suggested goals
      - Personal goals : networking, learning, improving skills (Excel exposure, working with a PC)
  - How long will it be when you graduate to working full time?
    - Internship before you begin your final year
    - Full time after graduation
  - CPA Suggestions before starting full-time
    - National start dates are set
    - Up to the individual to get as much done before the start date
    - Lots of pieces for CPA exam
    - Prepare to spend a lot of time signing for the CPA exam.
  - Social time
    - Virtual happy hours
    - Lots of Teams calls
    - Magician
    - Team happy hour at least every other week
    - All video calls
    - Water cooler chat
      - Monday 9-10 am
      - Friday 4-5 pm
  - Excitement is to be expected
    - College with paycheck
    - Not just your friend group
    - Find firm that will fit your
    - Attend as many events as you can
      - Can meet people here and there
  - Internship status
    - Varies every year
    - 100% last year came back
    - 96% come back usually
    - Soft skills lack in people who get rejected
    - Virtual interaction similar to real interaction
    - Get your true self in virtual setting = easier than real setting
    - Get dressed and go somewhere quiet