

The Proactive Accountant | Learning Objectives and Assessment tasks

COURSE INDUCTION AND ORIENTATION [PREAMBLE TO MODULE 1]		
Course orientation guide Assessment tasks and SMART action Tips and tricks	<ol style="list-style-type: none"> 1. Understand the objective of this course and how it relates to your role now and into the future 2. Understand and use the key principles of SMART action planning to get results from this course 3. Understand the behaviours required to move from reactive to proactive in the work place 4. Establish your personal learning program including timelines and feedback process 	<ol style="list-style-type: none"> 1. Establish your learning timeline for this program. Share this with your manager. 2. Investigate the accounting firm of the future by googling '<i>accounting firm of the future.</i>' What does the firm of the future look like for the clients of accounting firms? 3. What skills do you need to focus on to be successful as an accountant in public practice? Consider both technical and non-technical skills. 4. Identify up to 3 SMART actions that you can take to be more proactive in dealing with issues and challenges. Use specific examples to support these actions.

Module	Focus Area	Module [5]	Learning objectives	Assessment tasks
1	Job budgeting and workflow management	How to understand service agreements and scope of work	<ol style="list-style-type: none"> 1. Understand what scope of work really means in relation to client engagement 2. Identify the key areas of focus in effectively managing personal workflow 3. Understand how to identify and manage changes in scope of work 	<ol style="list-style-type: none"> 1. Review the service agreement provided. Compare with engagement letters provided to clients by your firm. What are the differences? 2. How can you more clearly identify client understanding of the service agreement and scope of work? 3. Identify 2 recent situations where work was completed that was out of scope. How was this managed? What could have been done differently to get a better result?

				4. Identify up to 3 SMART actions that you can take in relation to your learnings from this module.
2		Develop and implement your job budgets [6]	<ol style="list-style-type: none"> 1. Understand the key steps in effectively managing job turnaround and deadlines 2. Outline the key steps required to manage job time cost budgets 3. Identify the key actions to take if workflow gets out of control 	<ol style="list-style-type: none"> 1. Explore your firm's approach to job turnaround and deadlines. How does this influence the way that you start and complete jobs? 2. What could you do differently to better manage the time cost budget associated with the jobs you complete? 3. Develop a checklist to monitor the key steps in delivering jobs on time, within budget 4. Identify up to 3 SMART actions that you can take in relation to your learnings from this module.
3		Principles of effective WIP management	<ol style="list-style-type: none"> 1. Understand the importance of effective WIP management in taking control of job budgets and turnaround time 2. Understand the key factors contributing to WIP issues and identify the solutions to these issues 3. Explore your personal challenges with WIP management and develop solutions 	<ol style="list-style-type: none"> 1. Document your firm's approach to WIP management. How many WIP days does your firm have at the present time? How does this compare with industry benchmarks? 2. Identify one recent job you completed where there was a significant write-off. What were the causes of this write-off? What could you have done differently? 3. Develop your personal 3 step process to effectively managing WIP. This process should incorporate a review of scope of work, fee for service and time cost budget. 4. Identify up to 3 SMART actions that you can take in relation to your learnings from this module.
4		Key workflow issues and solutions	<ol style="list-style-type: none"> 1. Understand your firm's approach to workflow management including reporting and review 	<ol style="list-style-type: none"> 1. Through personal observation and feedback from colleagues, identify the 3 top workflow bottlenecks in your firm or your team. What are the reasons for

			<ol style="list-style-type: none"> 2. Understand the key bottlenecks and constraints affecting throughput of compliance and advisory work 3. Explore your personal challenges in relation to workflow management and develop solutions 	<p>these bottlenecks? Have any solutions been identified? What would you do?</p> <ol style="list-style-type: none"> 2. Identify key strategies that you could use to be more proactive in following up clients for information required to complete jobs. 3. Identify key strategies that you could use to be more proactive in following up your manager for information required to complete jobs. 4. Identify up to 3 SMART actions that you can take in relation to your learnings from this module.
5	Client Engagement and Communication	Develop your personal client service charter [7]	<ol style="list-style-type: none"> 1. Understand the principles of client service excellence in accounting firms 2. Identify the firm's expectations of you in relation to client relationship management 3. Outline key actions that you can take in your role as a young accountant to engage with clients 	<ol style="list-style-type: none"> 1. Review the firm's approach to client service. Identify the aspects of the firm's approach that you would regard as 'beyond' good service. 2. Identify the key touch points between you and clients during the completion of work. What is working well? What could be improved? 3. Looking forward, what skills do you need to develop to engage better with clients? 4. Identify at least 3 SMART actions you will implement as a results of your learnings.
6		Keys to effective communication with clients	<ol style="list-style-type: none"> 1. Understand the importance and value of different types of written and verbal communication with clients. 2. Explore your current communication with clients and develop strategies to enhance this level of engagement 3. Identify coaching and training needs in relation to your communication with clients 	<ol style="list-style-type: none"> 1. Identify the types of written and verbal communication you have with clients. What's working well? What could be improved? 2. Consider the situations in which communication with clients should be (a) more formal and (b) more informal. How comfortable do you feel in each situation? What could you do to improve the effectiveness of your communication?

				<ol style="list-style-type: none"> 3. What support (training, coaching, scripts etc) do you need to improve your written and verbal communication style? 4. Identify at least 3 SMART actions you will implement as a results of your learnings.
7		Use active listening to understand client needs	<ol style="list-style-type: none"> 1. Understand the difference between what clients need and what they really want 2. Identify the questions you can ask yourself, your manager and your clients to better understand their needs and wants 	<ol style="list-style-type: none"> 1. As a young accountant, what can you do to help the firm manage client expectations in relation to engagement, communication and proactivity? 2. Develop a simple personal checklist to help you better understand your client needs. Refer back to Module 4 if required (how to better understand clients, services and value). 3. Using the active listening questions and guidelines provided, develop a simple script to better understand what clients are thinking. 4. Identify at least 3 SMART actions you will implement as a results of your learnings.
8		Beyond the numbers –from historical analysis to future focus	<ol style="list-style-type: none"> 1. Understand what ‘future focus’ means in reviewing client financial data. 2. Identify core accounting and advisory services that focus on the future 3. Identify the questions you can ask to better understand client issues and needs into the future 	<ol style="list-style-type: none"> 1. Explore the tools that the firm has available to look ‘into the future.’ How are these tools currently used with clients to help them see into the future? 2. Compile your personal list of KPIs to review in relation to business client financial trends. Consider how these KPIs may vary with different client types. 3. Develop a simple financial forecast for a business client based on the historical data you have available. (You will need to decide which data is relevant). Discuss with your manager.

				4. Identify 3 SMART actions that you can take to have a stronger 'future focus' when working with client financial data.
9	Team engagement and support	What collaboration and team engagement is all about	<ol style="list-style-type: none"> 1. Identify key steps to engage collaboratively with business colleagues on a day to day basis 2. Review and confirm engagement and communication strategies with your manager 3. Identify and address personal roadblocks to effective engagement with colleagues 	<ol style="list-style-type: none"> 1. Describe at least 5 ways that you collaborate with the people around you on a day to day basis. How effective is this collaboration? What could be improved? 2. Investigate the collaborative tools available to you and the people with whom you work. Identify 3 ways to improve the effectiveness of these tools. 3. Consider the collaborative relationship you have with your manager. On the basis of the suggestions from this presentation, what can you do to improve the level of communication and collaboration? 4. Identify at least 3 SMART actions you will implement as a results of your learnings.
10		How to work effectively with administrative staff	<ol style="list-style-type: none"> 1. Review your working relationship with colleagues within the administrative team. 2. Explore the challenges that administrative teams face within a professional service environment 3. Put in place a formal process for improving client service with the support of the administrative team 	<ol style="list-style-type: none"> 1. Make a list of the key tasks that the administrative team performs to support the work that you do for clients. Are there any other tasks that could be delegated to the administrative team? 2. Have an informal meeting with a senior member of the administrative team and ask for their feedback on their relationship with the accounting team. What's working well? What could be improved? 3. Identify 3 tasks that you currently do that could be effectively managed by administrative staff. What are the roadblocks to delegating this work? How can these roadblocks be overcome?

				4. Identify at least 3 SMART actions you will implement as a results of your learnings.
11		Keys to managing the relationship with your manager	<ol style="list-style-type: none"> 1. Understand the key factors influencing the relationship that you have with your manager 2. Explore the actions that you can take to improve communication with your manager 	<ol style="list-style-type: none"> 1. Document the key performance areas that you and your manager focus on at the present time. What's going well? What could be improved? 2. Have an informal meeting with your manager and ask for their feedback on the level of communication with you. What is working well? What could be improved? 3. Develop a simple process for proactively managing the expectations of your manager. Document and share with your manager. 4. Identify at least 3 SMART actions you will implement as a results of your learnings.
12		Keys to effective team meetings and projects	<ol style="list-style-type: none"> 1. Explore the key steps for effective meetings with staff and clients 2. Identify the key steps required to effectively manage projects 3. Develop your own project management checklist 	<ol style="list-style-type: none"> 1. Identify one regular meeting that you are involved in that could be improved. Develop a list of recommendations and share them with the facilitator of this meeting. 2. Identify at least 3 jobs or projects that you are involved in that would extend beyond 4 weeks in duration. How do you plan the execution of these projects? What could be improved? 3. Identify a recent situation where you were unable to complete a project within the allocated timeframe. What were the issues? What could you have done differently? 4. Identify at least 3 SMART actions you will implement as a results of your learnings.

13	Productivity and Professional Development	How to be really productive (it's not just about chargeable work)	<ol style="list-style-type: none"> 1. Explore what 'productivity' really means in a professional service environment. 2. Review the firm's expectations of you in relation to productivity. 3. Identify key steps that you can take to improve your productivity as a young accountant 	<ol style="list-style-type: none"> 1. Identify your current productivity level based on the firm's measurement criteria. How does this compare with the firm's expectations? What could you do to improve your productivity results? 2. Identify at least 3 actions you could take to be more efficient in completing jobs and tasks (doing the same thing quicker without affecting quality of work, or delegating to others more capable of completing the task efficiently) 3. What actions can you take in terms of planning and reflection to improve your personal productivity and performance? How much time should you set aside for these actions on a daily basis? 4. Identify at least 3 SMART actions you will implement as a results of your learnings.
14		Keys to getting things done in a timely and effective way	<ol style="list-style-type: none"> 1. Understand the key principles of effective time management in a professional service environment. 2. Put in place steps to take control of your work environment 3. Identify your personal time management challenges and develop potential solutions 	<ol style="list-style-type: none"> 1. Identify the key types of interruptions you experience in day to day work. Estimate the time lost as a result of these interruptions. 2. Develop strategies to take more control of your work environment to reduce interruptions. 3. Develop a weekly planner to better organise your time and tasks. 4. Identify at least 3 SMART actions you will implement as a results of your learnings.
15		Develop your SMART action list for personal growth	<ol style="list-style-type: none"> 1. Understand the key principles of effective personal goal setting 2. Put in place a personal action plan based on your learnings and SMART actions from this program 	<ol style="list-style-type: none"> 1. Ensure that your consolidated SMART action list is up to date. Check priorities, responsibilities and deadlines. Share with your manager 2. Identify which SMART actions will require firm support or approval to proceed e.g. changes to

			3. Share your personal SMART actions with your manager and other relevant colleagues	<p>systems or processes. Discuss these with your manager</p> <p>3. Identify the top 3 potential roadblocks to implementation of your actions. Outline what you will do to address these roadblocks in a proactive manner.</p> <p>4. Establish your 90 day action plan. Confirm the initial 5 SMART actions, outline what needs to happen and keep track of progress through your personal task management system</p>
16		How to stay on track with your professional development	<p>1. Identity your ideal role and responsibilities as an accountant in public practice</p> <p>2. Create a personal culture of accountability for implementation of your agreed actions</p>	<p>1. Review your position description. Assess the extent to which this reflects your role at this point in time. What needs to change? Discuss with you manager</p> <p>2. Review your professional development goals over the next 12 months. What has changed as a result of this course?</p> <p>3. Consider how you can have better coaching conversations with your manager. Take the lead (if required) in managing these conversations.</p> <p>4. Provide some feedback on this course through the eLearning platform.</p>