



BUILD YOUR FEE BASE

Strategies for Partners and Managers

COURSE OUTLINE

A focus on fee growth can be one of the most challenging skills to master, especially when the focus in early years of PD has been on the acquisition of technical skills and competence.

What are the firm's expectations of you in relation to fee growth? Do your KPIs include a reference to 'business growth' activities? Do you feel confident in taking a leading role in helping your firm to achieve its financial goals? For managers aspiring to partnership, demonstration of business growth skills is an essential pre-requisite.

This course is designed to help the managers and partners of accounting and advisory firms develop the confidence and skills to be more proactive in driving business growth with new and existing clients. We will provide specific step-by-step guidelines to help you identify your personal professional brand and service focus. We'll help you to get outside your 'compliance' service mindset to develop client relationships and professional networks for growth.

At the commencement of the course, we'll help you set some specific business growth targets. As the course proceeds, we'll work with you to address issues and roadblocks to success in achieving your growth targets

WHO SHOULD ENROL?

This eLearning course provides managers, partners and principals in public practice with a clear guide to growing their fee base. Most importantly, participants are encouraged to consider and develop their own influencing style in relation to client and professional partner relationships. This course is designed to help the managers and partners of accounting and advisory firms develop the confidence and skills to be more proactive in discussing opportunities to add value to clients.

We will provide specific step-by-step guidelines to help you identify your personal professional brand and service focus, get outside your 'compliance' service mindset and develop client relationships and professional networks for growth. At the commencement of the course, we'll help you set some specific business growth targets. As the course proceeds, we'll work with you to address issues and roadblocks to success in achieving your growth targets.

For Registration Details

<https://cpdforaccountants.com.au/courses/build-your-fee-base/>

COURSE CONTENT

This course consists of 12 modules:

1. Establish your personal business development plan
 2. Find your personal professional brand and service focus
 3. How to get outside your compliance comfort zone
 4. How to build enduring client relationships for growth
 5. Maximise the opportunity for active client referrals
 6. Keys to getting prospects across the line with new fees
 7. Power and influence in leveraging networks
 8. Work with colleagues to identify opportunities
 9. Develop external cross-referral relationships
 10. Effective online networking strategies for professionals
 11. Make time for business development activities
 12. Your BD monitoring and measurement process
- + Two 1:1 online coaching sessions with our experts (following Modules 3 and 10)**

CPD – This course is worth 24 CPD hours

All modules are structured with specific learning objectives and assessment tasks. Learners are expected to demonstrate that they understand learning objectives and can apply concepts through completion of the assessment tasks. A SMART action planning template is used to consolidate specific actions and to ensure that a timeframe for completion is established and followed. Regular review of progress is ensured through commitment to completing the course.

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OUR LEARNING PROCESS

Our self-paced eLearning courses follow a 4-step process in relation to learning objectives:



THE ELEARNING ACADEMY

- Learners can complete courses at a place that suits them, within and outside work hours
- Each learner will have a dedicated login to give them personal access to their course
- Module material includes online presentations, workbooks, PowerPoint Slides, templates, scripts and articles
- All modules also incorporate formal qualitative assessment tasks that encourage learners to develop practical actions demonstrating understanding of the concepts
- All assessment tasks are scored, with directed feedback to learners on their response
- As the learner progresses, they develop their personal SMART action list to drive change
- Managers are able to see at a glance how their staff are progressing
- All learners have access to course content for 12 months following their enrolment

FEEDBACK FROM LEARNERS IN OUR COURSES

" When I first enrolled in this course, I was sceptical, after all what could I learn after already working in public practice for 4 years? I was wrong – this is the most beneficial course I have completed since deciding that I wanted to be an accountant (even more so than my degree or CPA) ! It teaches you so many of the basic skills required to operate as efficiently as possible and encourages you to think in new ways and approach difficult situations from a new angle. I would highly recommend this course to any accountant in public practice.

" This course is simply great! The presentation and slides were straightforward for us to understand. The course has highlighted things that are important for accountants in adding value to clients, to our firm and to ourselves. As an accountant who's been in the industry for 5 years, I learned quite a lot from this course. I can easily see how beneficial this course would also be for those who have just started their career.

Thank you for a great course. Thank you for being prompt with your marking and getting back to me when I had questions and requests. I really enjoyed developing the SMART actions. These helped me stay focus and relate the course back to what I was doing at work. I also learnt a lot in the business analysing modules and thought this gave me some great goals to work towards. I also came away with some useful tips to help me be more productive which is great. The course helped me get better with time budgets and effectively managing job turnaround. Lastly, I thought the introduction to the course and the future accountant was great!

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