



THE PROACTIVE MANAGER

**An essential course for compliance and
advisory managers**

DRIVE THE GROWTH OF YOUR COMPLIANCE AND ADVISORY MANAGERS

As accounting firms move from a dominant focus on compliance in the work they do with clients to a focus on both compliance and advisory skills, the role of manager has never been more critical.

Two types of managers are evolving in public practice, the first with the experience and ability to drive compliance work efficiently and the second with the desire and interest to transition to a stronger advisory role. Both roles are extremely important in progressive accounting firms.

Are your managers more suited to compliance or advice? What are you doing to develop their skills to take on these increasingly specialised roles?

WHAT'S THE COURSE ALL ABOUT?

In this new 16 part online course, we'll help your managers to identify their core strengths and professional development pathway. We'll outline the essential steps that effective compliance and advisory managers need to take now and in the future to achieve strong results for your firm.

This course is essential for both compliance and advisory managers looking to get to the next level. We'll challenge your perceptions and behaviours and explain best-practice guidelines for workflow and client relationship management at a compliance and advisory level.

HOW DOES IT WORK?

Each module incorporates a presentation, support notes, a workbook and assessment tasks linked to specific learning objectives. Track progress and review your personal SMART action plan as you work through the 16-part eLearning course.

WHO'S IT FOR?

This course is suitable for managers and partners wishing to specialise in a compliance or advisory role within an accounting firm.

For Registration Details

<https://cpdforaccountants.com.au/courses/the-proactive-manager/>

COURSE CONTENT

This course consists of 16 modules:

1. Your Future as a Manager in Public Practice

- The 4Q approach to management – workflow, team, clients and growth
- Uncover your strengths and motivated abilities as manager

2. The Compliance Manager in Public Practice

- Effective use of capacity to leverage compliance workflow
- Key steps to improve compliance productivity and turnaround time

3. The Advisory Manager in Public Practice

- The role and responsibilities of advisory manager
- Keys to transition from compliance to advice as a manager

4. Client Management for Proactive Managers

- How to set and manage client service excellence standards
- Management of scope of work and fee for service

5. Team Management for Proactive Managers

- Evolution from doer to manager and leader of people
- Keys to drive behavioural change in your team

6. Workflow Management for Proactive Managers

- Workflow management essentials for proactive managers
- Key principles of effective project management for advisors

7. Growth and Business Development for Proactive Managers

- Client discovery and needs analysis techniques for advisors
- Getting clients across the line with advisory services

8. Measurement and Reporting for Compliance and Advisory Managers

- Essential KPIS for compliance and advisory managers
- Develop your own measurement and reporting process

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!

For Registration Details

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