CPDForAccountants
Self-Paced E-Learning Courses

Client Manager 2020

Take Control of Client Relationships

Information Brochure

COURSE OUTLINE

As accounting firms transition from a focus on compliance services to a more strategic approach in helping clients to achieve their financial goals, there's a strong need for accountants, managers and partners to be more proactive in managing client relationships. The challenge is that in most firms, most of the workflow is still compliance driven. This fosters a production line mentality where the main focus is on outputs rather than engagement.

It's important that the sustainable firm of the future places emphasis on the development of strategic, organisational and communication skills in their accounting staff. This includes guidance on client engagement, managing expectations, identifying opportunities, overcoming issues, reframing relationships and being proactive with communication.

WHAT'S THE COURSE ABOUT?

The **Client Manager 2020** Course focuses on the key steps required for accountants, managers and partners to take control of client relationships at a personal level. We'll discuss how technology can allow individuals and firms to streamline compliance and open up opportunities to add value through stronger ongoing client relationships.

WHO SHOULD ENROL

This self-paced eLearning course is suitable for accountants, managers and partners who really want to take control of client relationships at a personal level. All 10 modules have clear learning objectives and assessment tasks. All learners will be required to develop their personal SMART action plan to drive client relationships at a level appropriate to their capabilities and responsibilities.

COURSE CONTENT

This course consists of 10 modules:

No	Module	Outline
1	**The New Age Client Service Manager**	*The responsibilities of the client manager in 2020 and beyond*
2	**Your personal client service standards**	*Develop your own client service excellence program*
3	**Establishing scope of work and fee**	*Establish clear terms of engagement with service agreements*
4	**Management of client expectations**	*Ongoing management of scope of work and fee for service*
5	**Management of client workflow**	*How to manage workflow at a compliance and advisory level*
6	**Client communication strategies**	*Communication strategies to engage consistently with clients*
7	**Dealing with difficult clients**	*How to manage challenging clients and difficult situations*
8	**Reframing client relationships**	*Key steps to introduce new services to existing clients*
9	**Client feedback and review processes**	*How to ensure that you're remaining relevant to your clients*
10	**10 projects to really engage with clients**	*Practical actions you can take to develop client relationships*

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.

CPD: This course is worth 20 CPD hours

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

COURSE FEE

The standard course fee is $700 + GST per learner.
An earlybird special of $525 + GST per learner [25% discount] is available until 31st May 2019.

This course commences on 1st June 2019. All registered learners can begin the course anytime after this date and have 12 months to complete the course.

Visit https://cpdforaccountants.com.au/courses/client-manager/