

## Getting Things Done | Learning Objectives and Assessment tasks

Area	Module	Learning objectives	Assessment tasks
1	How to effectively utilise the hours in your day	<ol style="list-style-type: none"> <li>1. Explore what productivity really means in a professional service environment. Review the firm's expectations of you in relation to productivity.</li> <li>2. Understand the key principles of effective time management and task prioritisation. Explore the key challenges in taking control of your day.</li> </ol>	<ol style="list-style-type: none"> <li>1. What are your top 3 time management challenges? [refer to slide 5]. What can you do now to address these challenges?</li> <li>2. Over the course of a day, document each time you were interrupted at work. Consider email and phone communication, meetings, office conversations, urgent matters arising, other distractions. What could you do now to reduce these interruptions?</li> <li>3. Identify 3 tasks that you currently do that could be delegated to others or better managed with the use of technology. What can you do now to improve the efficiency of these tasks?</li> <li>4. Identify up to 3 SMART actions that you can take in relation to your learnings from this module. Add these to your consolidated SMART action template (refer to RESOURCES folder)</li> </ol>
2	Keys to improve your workflow processes	<ol style="list-style-type: none"> <li>1. Identify the key factors affecting your ability to complete work in a timely and effective manner.</li> <li>2. Explore client expectations and the effect that they have on the completion of work</li> <li>3. Identify the key steps involved in developing a digital workflow platform. Explore what you can do in your firm to achieve this outcome.</li> </ol>	<ol style="list-style-type: none"> <li>1. Explore your firm's approach to jobflow and deadlines. How does this influence the way that you start and complete jobs?</li> <li>2. What could you do differently to better manage your workflow, especially in relation to throughput (time from commencement to completion of work)?</li> <li>3. What could you and/or your firm do to better manage client expectations in relation to workflow? Consider cloud accounting solutions, pricing options, workflow scheduling and the calling in of work, follow up of clients for information.</li> <li>4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet</li> </ol>

3	Effective leverage and delegation techniques	<ol style="list-style-type: none"> <li>1. Understand the key steps involved in delegating work and following up effectively</li> <li>2. How to set expectations and address performance issues in relation to delegation</li> <li>3. Identify and address challenges relating to the delegation process</li> </ol>	<ol style="list-style-type: none"> <li>1. How leveraged is your firm? Consider the number of full-time equivalent administrative, technical and advisory staff. How does this affect your ability to add value to your current role?</li> <li>2. How productive are you at the present time? Consider the percentage of your time that you charge to clients, also the value of the non-chargeable work that you do. Do you spend enough time being proactive in relation to workflow and client relationships?</li> <li>3. Make a list of the tasks you currently do that could or should be delegated. To whom should / could these tasks be delegated? What is preventing you from doing this?</li> <li>4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet</li> </ol>
4	Maximise recoverability through WIP management	<ol style="list-style-type: none"> <li>1. Understand the importance of effective WIP management in taking control of projects, job budgets and turnaround time</li> <li>2. Understand the key factors contributing to WIP issues and identify the solutions to these issues</li> <li>3. Explore your personal challenges with WIP management and develop solutions</li> </ol>	<ol style="list-style-type: none"> <li>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?</li> <li>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?</li> <li>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.</li> <li>4. Identify up to 3 SMART actions that you can take in relation to your learnings from this module.</li> </ol>
5	How to set and achieve goals through SMART actions	<ol style="list-style-type: none"> <li>1. Understand the key principles of effective personal goal setting</li> <li>2. Explore your personal challenges with setting and completing tasks, jobs and projects</li> </ol>	<ol style="list-style-type: none"> <li>1. Ensure that your consolidated SMART action list is up to date. Check priorities, responsibilities and deadlines. Share with your manager</li> </ol>

		<ol style="list-style-type: none"> <li>3. Use the core principles of SMART action planning to set and review goals at a business level</li> </ol>	<ol style="list-style-type: none"> <li>2. Identify which SMART actions will require firm support or approval to proceed e.g. changes to systems or processes. Discuss these with your manager</li> <li>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.</li> <li>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</li> </ol>
6	Project management skills for accounting professionals	<ol style="list-style-type: none"> <li>1. Understand the basic principles of project management</li> <li>2. Understand and address key issues with project management within your firm</li> <li>3. Explore project management skills required for client advisory projects</li> </ol>	<ol style="list-style-type: none"> <li>1. Identify at least 3 key challenges you have in effectively managing internal projects. What actions can you take to address these challenges?</li> <li>2. Outline the process you undertake when commencing client advisory projects. How do you commence these projects? What conversations do you have with clients, up front, to prepare them for the project? What could you do differently?</li> <li>3. Put together a list of the top 3 internal projects that are important to you, your team or your firm in the next 12 months. What needs to happen for these projects to succeed?</li> <li>4. Identify at least 3 SMART actions you will implement as a result of your learnings from this module. Incorporate in your consolidated SMART action spreadsheet</li> </ol>
7	Technology tips and techniques to get things done	<ol style="list-style-type: none"> <li>1. Explore how technology could improve the performance of your firm and create additional capacity</li> <li>2. Identify at least 3 actions that you can take, personally, to get better use from technology and save time</li> </ol>	<ol style="list-style-type: none"> <li>1. Consider the 12 steps that your firm can take to improve production. What can you do now to move forward with one of these steps? [Even if you're in administration or working in a junior accounting capacity, you can make suggestions to the firm]</li> </ol>

			<ol style="list-style-type: none"> <li>2. Review your personal task management system. Does this work effectively? How can you use technology to improve the way you manage your tasks and projects?</li> <li>3. Review the 5 technology-focused actions you can take to improve your personal productivity. Identify and discuss one action you can implement now.</li> <li>4. Identify at least 3 SMART actions you will implement as a result of your learnings from this module. Incorporate in your consolidated SMART action spreadsheet</li> </ol>
8	Proactive management of client relationships	<ol style="list-style-type: none"> <li>1. Understand why it's so important to set client expectations up front</li> <li>2. Identify the key challenges that you and your firm have in managing client relationships</li> <li>3. Explore the actions that you and your firm can take to better manage client relationships</li> </ol>	<ol style="list-style-type: none"> <li>1. Does your firm have a client service charter? Review the charter example outlined in slide 8. What key elements of this could you adopt personally to improve your communication with clients?</li> <li>2. Review the process the firm has adopted to engage new clients and re-engage existing clients. What could be improved in relation to communicating expectations? What can you do, personally, to assist with the implementation of this recommendation?</li> <li>3. Review the 10-step process for managing scope of work outlined in this module. Identify specific actions that you and/or your firm can implement to better manage scope and fees as jobs proceed.</li> <li>4. Develop at least 3 SMART actions for this module. Check that actions are specific, not general. Incorporate in your consolidated SMART action spreadsheet.</li> <li>5.</li> </ol>