



# CLIENT SERVICE ADMINISTRATION

## How to take control of clients and workflow – A guide for accounting and advisory firms

A self-paced eLearning course for administrators and support staff in public practice | 10 Modules | 20 CPD Hours

### The evolution of the CSA role

The modern accounting and advisory practice requires a high level of administrative support to free up the capacity and expertise of specialist advisors.

The Client Service Administrator is an essential role that is evolving in almost every progressive professional firm.

This person uses both technology and soft skills to provide an essential link between clients and the firm's technical staff.

In addition, CSA's add valuable support to the firm in relation to financial management, people management, systems development and marketing activities.

### What's this course all about?

The eLearning course is designed to help the administrative team of your firm to take control of clients and workflow at an administrative level. The course will challenge your staff as well as your firm to adopt best practice in relation to client relationship management and workflow management.

The course can be completed in group or individual format. Assessment tasks will encourage and challenge your team to consider what they can do to improve the way the firm manages clients and workflow.

Support material includes workbooks, procedures and scripts relevant to the topics being discussed.

## WHO'S THIS COURSE FOR?

This course is suitable for any accounting or advisory firm looking for its administrative staff to take a more proactive role in the management of clients and workflow.

### Senior Administrators

This course provides Senior Administrators with an update on the evolving role of CSAs in managing clients, workflow and staff at an administrative support level.

They are encouraged to involve their team in this course, to consider what changes the firm can make at an administrative level to help with the transition from compliance to advice.

### The Administrative Team

Administrative team members are encouraged to participate in this course as a group, to look more deeply at their own roles and responsibilities in helping the firm to achieve its strategic objectives.

Core principles of effective communication and engagement with the people around them will be discussed throughout the course.

## HOW DOES IT WORK?

The CSA eLearning course consists of 10 modules with clear learning objectives. Content includes presentations, workbooks, support materials and assessment tasks. Most importantly, learners develop their own professional development pathway using our SMART action planning template.

## OUR LEARNING PROCESS

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



Assessment tasks are designed to help learners implement objectives relevant to their specific situation and capabilities. Learners are also encouraged to suggest changes in the way your firm operates when it affects their ability to manage workflow and clients at an administrative level.

For Registration details:

<https://cpdforaccountants.com.au/courses/csa-2020>

# COURSE CONTENT

This course consists of 10 modules:

## **Administrative roles and responsibilities**

1. CSA team structure and responsibilities
2. Getting engagement and support internally

## **Client relationship management**

3. Establishing client service excellence standards
4. Client engagement and communication strategies

## **Workflow management**

5. Scheduling and throughput of client work
6. Creating effective workflow reporting systems

## **Teamwork and collaboration**

7. Working together as an administrative team
8. Working effectively with the technical team

## **Special CSA Projects**

9. Client profiling and marketing strategies
10. Proactive management of WIP and debtors

**CPD – This course is worth 20 CPD hours**

# COURSE STRUCTURE

- Each module includes an online presentation and support materials including templates, scripts and articles.
- 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.

**For Registration details:**

<https://cpdforaccountants.com.au/courses/csa-2020>

## 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 PREVIOUS LEARNERS

I have really enjoyed this course. It has enabled me to think about my role within the firm in a different way, as someone who is capable of implementing changes instead of just processing tasks. I have become more proactive in my thinking and now able to challenge myself in my role but also able to challenge my manager and the firm.

Nicole Attwater

This course has given us a lot of discussion points. It allowed us all to see what we are doing differently and become a more cohesive team. It had many different ideas we hadn't thought about and allowed us to think outside of the box. We also were able to spend the time together and it enhanced our team relationship. Thank you.

Amanda Edwards

This course provided everything we were looking to get out of it for not only our Administration team, but also for our technical team. It was very eye-opening as to what we needed to improve as a firm and I will highly recommend this course to anyone thinking of participating.

Chelsea Knuckey

This course was not only valuable to the administrative team, but helped the whole firm in developing systems and processes to really manage client relationships and workflow in a proactive way. The SMART actions are a great way to convert theory into practice. Thanks for a great course.

Susan Johnson

**For more course feedback, visit**

<https://cpdforaccountants.com.au/course-feedback>

**For Registration details:**

<https://cpdforaccountants.com.au/courses/csa-2020>