CPDForAccountants
Self-Paced E-Learning Courses

Path to Partnership | Learning Objectives and Assessment tasks

Area	Core Topic	Module	Learning objectives	Assessment tasks
1	Workflow Manager	Seven keys to improve your personal and team workflow management processes	1. Identify the key factors affecting your ability to complete work in a timely and effective manner. 2. Explore client expectations and the effect that they have on the completion of work 3. Identify the key steps involved in developing a digital workflow platform. Explore what you can do to achieve this outcome.	1. Explore your team's approach to job flow and deadlines. How does this influence the way that you start and complete jobs? 2. What could you do differently to better manage your workflow, especially in relation to throughput (time from commencement to completion of work)? 3. What could you and/or your team 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. 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
2		Task and project management skills for leaders in public practice	1. Understand the basic principles of project management 2. Understand and address key issues with project management within your firm 3. Explore project management skills required for client advisory projects	1. Identify at least 3 key challenges you have in effectively managing internal projects. What actions can you take to address these challenges? 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? 3. Put together a list of the top 3 internal projects that are important to you or your team in the next 12 months. What needs to happen for these projects to succeed? 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet

3		How to maximise recoverability through project and WIP management	1. Understand the importance of effective WIP management in taking control of projects, job budgets and turnaround time 2. Understand the key factors contributing to WIP issues and identify the solutions to these issues 3. Explore your personal challenges with WIP management and develop solutions	1. Document your team's approach to WIP management. How many WIP days does your team have at the present time? How does this compare with industry benchmarks? 2. Identify one recent job you or a team member completed where there was a significant write-off. What were the causes of this write-off? What could you have done differently? 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. 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
4		How to effectively utilise the hours in your busy day to achieve results	1. Explore what productivity really means in a professional service environment. 2. Review the firm's expectations of you in relation to productivity. 3. Understand the key principles of effective time management and task prioritisation. Explore the key challenges in taking control of your day.	1. What are your top 3-time management challenges? What can you do now to address these challenges? 2. Over the course of a 'normal' 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? 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? 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
5	Team Leader	How to develop your personal leadership style and approach	1. Understand motivational styles and how they affect performance	1. Outline characteristics of different coaching styles. Think of individuals you know that demonstrate each of these styles. How effective are their coaching skills?

			2. Describe your natural coaching style and how it impacts on performance management 3. Identify how different coaching styles can be used in specific situations	2. Identify your natural coaching style. In which situations is this an effective coaching style? In which situations is it ineffective? 3. Identify 3 specific situations in your team that require different coaching styles. Consider how you would provide coaching support in each situation. 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
6		Nine key steps to effective team coaching in professional firms	1. Understand the difference between teaching, coaching and mentoring 2. Review the key attributes of effective team coaches in business 3. Identify simple coaching strategies to guide staff to achieve results	1. Consider the core principles of effective coaching – (1) ask questions, (2) ask for solutions and (3) adapt your style. What are you good at? What could be improved? 2. Identify up to 5 KPIs that you believe reflect the behaviours you would like to see in your team? How could you measure these KPIS on a regular basis? 3. Identify a real-life situation where you can use your coaching skills to improve individual performance. How will you go about doing this? 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
7		How to create capacity through effective leverage and delegation	1. Understand the key principles of effective delegation in teams 2. Identify the steps that you and your team can take for greater leverage 3. Explore specific actions to delegate responsibility for workflow and client management	1. Estimate the percentage of your time that you could free up to focus on client relationships or business development with effective delegation. Make a list of the projects and tasks that you could delegate to others. 2. Identify the key challenges you have with effective delegation. [If you feel courageous, ask your team members for feedback on your management style and approach to delegation}.

				3. With each challenge identified in assessment task 2, provide potential solutions, based on the 7 steps of effective delegation. 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
8		How to create capacity through effective leverage and delegation Key steps to effectively manage team members through training, coaching and performance review	1. Review key elements associated with identifying the right roles for team members 2. Identify the personal and professional skills you require in your team in relation to workflow and client relationship management 3. Put in place a professional development / training plan that effectively engages team members	1. Map your team in relation to roles and responsibilities. Then consider whether each team member has the skills to manage their job effectively. Identify the gaps. Refer to the Professional Skills Matrix provided in supporting materials. 2. Review or document the professional development status of each team member. What specific training or coaching do they require in the next 12 months? Are they aware of this need? What actions have been taken to provide this training or coaching? 3. Explore the steps outlined in relation to workflow and client relationship management within your team. Have you identified any gaps that need to be addressed through training or coaching? 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
9	Business Developer	Client discovery and effective needs analysis techniques	1. Understand the principles of active listening for client managers and partners 2. Explore the use of probing and clarifying questions for rich conversations	1. Develop your list of open-ended questions that will assist you in exploring client needs. Include examples of probing and clarifying questions. 2. Think of a situation where you failed to get a client or prospect 'across the line' with a new project or matter. What could you have done differently in relation to communication and active listening skills?

			3. Start to explore the value of the discovery conversation to really engage your business clients	3. Identify at least 3 opportunities you have in the next month to practice active listening skills. You may consider conversations with colleagues, clients, prospects, family or friends. 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
10		Effective internal and external referral strategies for growth	1. Understand the key roles of power and influence in developing networking relationships 2. Explore current internal and external networking relationships. identify opportunities to increase the value of these relationships 3. Review the 7-step process for developing external professional partner relationships	1. Critically review how effective you are in leveraging networks through power and influence. Where have you seen success? What are the key challenges you face in getting more value from your networking relationships? 2. Identify any opportunities for internal networking for growth. Consider special skills or interests that you and your colleagues have. How can you leverage these skills and interests in client discussions? 3. Make a list of your key external networking relationships. Identify the value of these relationships and proposed next steps. Ensure a timeline is in place for each next action. [Compare with those of your colleagues if appropriate.] 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
11		Keys to getting existing clients across the line with new services	1. How to present both formal and informal proposals to get clients across the line 2. Identify and address key roadblocks to client agreement to additional services	1. Identify a situation within the last 12 months where you were unsuccessful in getting a client across the line with new services. What do you believe you could have done differently? Is there any value in revisiting this opportunity? 2. Develop a formal proposal template. Consider the type of clients and opportunities to which you will present a proposal. Focus should be on clients where an ongoing service

			3. Actively engage clients in making the decision on scope and fee for service	arrangement will be required e.g., regular reporting and meetings. 3. Develop a 3-option proposal for advisory projects. You may consider variations in the level of data collection and processing support, the frequency of financial reports and meetings or the level of strategic support provided. 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
12		How to establish your personal business development plan	1. Understand the key principles of business growth in a professional services environment 2. Establish your personal business fee growth targets 3. Develop a structure for the ongoing management of business growth activities and opportunities	1. Establish your personal BD growth targets using the spreadsheet provided. Share with a colleague and discuss how your goals support the firm's BD objectives. 2. Critically review your existing client base using the client profiling tool provided (or another tool that you have access to). Identify the top 10 opportunities for new services to existing clients. 3. Develop your templates for BD and Professional Partner opportunities and leads. Populate the lists with all current and proposed activities. Set aside a time each week to review and update your list. Involve a CSA or other staff member as required. 4. Develop at least 3 personal, team or firm SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
13	Trusted Advisor	Management of client scope and fee for service	1. Understand the key factors that may influence the scope of work as client matters proceed 2. Develop a simple 10 step process for managing scope of work	1. Review the process the firm has adopted to establish the right fee for services up front. Consider what further steps could be taken to ensure that the fee takes into account the full nature of compliance and advisory projects.

			3. Put in place a process to ensure regular internal and external review of scope of work and fee for service	2. Identify how variations in scope of work are managed within the firm. Who is responsible? Are these issues dealt with proactively? What needs to change in order to take better control of pricing as matters proceed? 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. 4. Develop at least 3 SMART actions for this module. Check that actions are specific, not general. Incorporate in your consolidated SMART action spreadsheet.
14		Communication strategies to engage with clients	1. Understand what 'client communication standards' means 2. Identify your personal training and coaching needs in relation to client communication 3. Identify systems and procedural changes required to achieve strong communication standards	1. Document communication standards and procedures associated with response to client queries. Consider leverage, timeliness, quality. Establish as your personal service standard in engaging with clients. 2. Identify up to 3 specific performance indicators that can be used to monitor the firm's approach to client communication. How do you rate in relation to these KPIs? 3. What key challenges have you identified in relation to your communication with clients? Outline some actions you can take to address these issues? Consider external training or changes in systems or processes. 4. Develop at least 3 SMART actions for this module. Check that actions are specific, not general. Incorporate in your consolidated SMART action spreadsheet
15		How to manage challenging clients and difficult situations	1. Take responsibility for proactive communication with clients 2. Explore the best ways to service all client types in a proactive way,	1. Identify 2 difficult clients where you feel you can improve the professional relationship. They may include clients who provide information slowly or in a poor condition, clients who always want more for the fee, clients who complain about the fee or

			consistent with client expectations and the fee that they pay 3. Identify how to address the different types of challenging situations involving clients	clients who never pay invoices on time. Outline what you can do, proactively to address the issue with these clients. 2. Do you have any clients that you would like to 'fire?' What are the alternatives for dealing with these clients? 3. Based on the information presented in this and previous modules, document the steps that you are going to take to improve the quality of professional relationship with your clients. 4. Develop at least 3 SMART actions for this module. Check that actions are specific, not general. Incorporate in your consolidated SMART action spreadsheet
16		How to ensure you're remaining relevant to your clients	1. Identify the key methods of receiving useful client feedback in relation to service levels and future opportunities 2. Set up a feedback process for your clients 3. Address specific challenges and roadblocks to effective implementation of a client feedback process	1. Critically review your firm's approach to formal client feedback. Discuss options including feedback forms and net promotor score. Agree on next steps. 2. Incorporate client feedback on service levels as part of your client meetings e.g., agenda item for annual client review meeting, discovery meeting. Develop a list of simple open-ended questions you can ask clients. 3. Develop a process to identify client advocates – those clients who will refer you to other clients when the opportunity arises. These clients believe that your service levels are exceptional. 4. Develop at least 3 SMART actions for this module. Check that actions are specific, not general. Incorporate in your consolidated SMART action spreadsheet

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