CPDForAccountants
Self-Paced E-Learning Courses

PATH TO PARTNERSHIP
A 4-COURSE eLEARNING COURSE

A practical guide to essential skills for managers and junior partners in public practice

4 Courses | 16 Modules | 32 CPD Hours

The emerging role of partner in public practice

Two types of leaders 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 with clients. Both roles are extremely important in progressive accounting firms.

Managers aspiring to take on partnership roles must be willing to work on all aspects of their role to add value to their clients, their team and their firm.

What are your strengths? What areas of professional development do you need to focus on now to achieve your goals and targets?

Do you have a path to partnership in your firm?

What's this course all about?

This self-paced eLearning course outlines a practical way the key leadership and management skills that managers and partners need to develop in order to achieve and exceed their performance goals.

This course begins by asking key questions about the learner's current strengths in relation to workflow, team, clients and business growth.

Your performance map will then provide a guide to the areas you need to focus on to achieve your potential as a manager or partner.

Along the way, you will use your personal SMART action plan to map your development path.

This course has been developed in conjunction with High Tech Soft Touch, consultants to accounting firms for the past 20 year. Visit hightechsofttouch.com.au

Learners can enrol in the full course or any of 4 individual parts. The course is work 32 CPD hours and can be completed in 4 to 6 months.

ARE YOU BECOMING A LEADER IN YOUR FIRM?

It's rare to find a manager or junior partner with developed skills in ALL areas of practice management and leadership. This usually comes after years and even decades of experience working in a public practice environment. However, by understanding your strengths and weaknesses, you're in a much stronger position to take on new challenges as you progress to partnership.

If you're interested in this course, you're keen to identify the skills you need to develop to become an effective leader in public practice. You may be an experienced manager or perhaps a junior partner keen to take your leadership and management skills to the next level.

WHAT'S THIS COURSE ALL ABOUT?

This self-paced eLearning course outlines a practical way the key leadership and management skills that managers and partners need to develop in order to achieve and exceed their performance goals.

The PATH TO PARTNERSHIP course consists of 4 stand-alone parts, each containing 4 modules. Each module includes clear learning objectives, recorded presentations, workbooks, support materials and assessment tasks.

Learners can enrol in each part, one at a time, or complete the full 4-part course at a place and time that suits them.

HOW DOES IT WORK?

At the commencement of the course, learners will be asked to assess their capability in 4 key areas of management and leadership performance – Workflow Management, Team Leadership, Business Development and Trusted Advisor Relationships. This assessment will provide a benchmark for ongoing review.

Within each module. learners will listen to a recorded presentation, review support material and then complete assessment tasks. There are no right or wrong answers, instead learners are encouraged to consider questions in relation to their role, work environment and professional goals.

Most importantly, learners will put together their own professional development pathway for implementation using our SMART action planning template.

WHO'S IT FOR?

This course is suitable for managers and junior partners keen to develop their leadership and management skills in relation to workflow management, team leadership, business development and client relationships.

HOW CAN YOU ENROL?

You can register for the course or each of 4 stand-alone parts.

The course is worth 32 CPD hours and takes between 4-6 months to complete.
Learners have access to the course for 12 months following enrolment.

For Registration details:
https://cpdforaccountants.com.au/courses/path-to-partnership

CONTENT

This course consists of 4 stand-alone parts, each consisting of 4 modules:

1. WORKFLOW MANAGER

Outline

This course provides an outline of core skills that managers and partners need to develop in order to effectively manage workflow.

Whilst delegation is the key to managing personal capacity, the ability to effectively manage time is essential to achieving performance goals.

Regular workflow reporting and review is also critical to identifying and overcoming roadblocks.

Modules

1. Seven keys to improve your personal and team workflow management processes
2. Task and project management skills for leaders in public practice
3. How to maximise recoverability through project and WIP management
4. How to effectively utilise the hours in your busy day to achieve results

2. TEAM LEADER

Outline

Research makes it clear that team design and team leader habits are key to team performance and well-being. Exceptional team leaders put in place an architecture that focuses on both teamwork (how people work together) and task work (what they get done).

This course is designed to provide new and experienced team leaders with a framework to achieve better results for their people, their team and the business in which they work.

Modules

1. How to develop your personal leadership style and approach
2. Nine key steps to effective team coaching in professional firms
3. How to create capacity through effective leverage and delegation
4. Key steps to effectively manage team members through training, coaching and performance review

3. BUSINESS DEVELOPER

Outline

A focus on fee growth can be one of the most challenging skills to master, especially when the focus in early years of PD has been on the acquisition of technical skills and competence.

This course is designed to help the managers and partners of accounting and advisory firms develop the confidence and skills to be more proactive in driving business growth with new and existing clients.

We'll also help you establish some key goals for business growth.

Modules

1. Client discovery and effective needs analysis techniques
2. Effective internal and external referral strategies for growth
3. Keys to getting existing clients across the line with new services
4. How to establish your personal business development plan

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CONTENT

This course consists of 4 stand-alone parts, each consisting of 4 modules:

4. TRUSTED ADVISOR

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 managers and partners to be more proactive in managing client relationships.

This course focuses on the key steps required managers and partners to take control of client relationships at a business and personal level.

Modules

1. Management of client scope and fee for service
2. Communication strategies to engage with clients
3. How to manage challenging clients and difficult situations
4. How to ensure you're remaining relevant to your clients

You can register for the course or each individual part.

This course is worth 32 CPD hours and takes between 4-6 months to complete. All learners have access to course content for 12 months following enrolment.

Each module includes an online presentation and support materials. All modules are structured with specific learning objectives and assessmenttasks. 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

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OUR LEARNING PROCESS

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

Understand → **Evaluate** → **Implement** → **Review**

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 COURSE LEARNERS

Undertaking this course has provided me with the opportunity to re-visit my goals and broadened my thought process to see where I need to be and what I need to do to achieve this. The materials provided in the course are very useful and practical and I will be using them to guide me to achieve my goals.

JN - The Proactive Manager

I have enjoyed working through this course at my own pace and on the online platform. The multiple array of documents and presentation styles means there is something for everyone in the sense of the different learning styles people possess. The information contained in has been clear and concise and very thought provoking.

MB - The Proactive Manager

I have felt that all the modules work very well together and flow on from each other. I have learned the importance of a client centric focus in the office. After all, if we don't have the ability to exceed clients' expectations then there is no obligation or reason for the client to stay with the firm. The modules in this course have given me the ability to discuss with the other partners and staff a range of ideas that have been overlooked and underestimated in importance.

TD - The Client Manager

For more course feedback, visit
https://cpdforaccountants.com.au/course-feedback

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