CPDForAccountants
Self-Paced E-Learning Courses

BUSINESS ANALYTICS FOR BOOKKEEPERS

How to provide strategic advice to business clients

A self-paced eLearning course for bookkeepers and BAS Agents working with business clients | 4 Modules | 16 CPD Hours

The emerging role of bookkeeper as business advisor

Bookkeepers provide an essential role in managing client financial accounts on a day-to-day basis.

However, being a proactive bookkeeper requires a lot more than just processing transactions accurately.

An introduction to the world of analytics can create opportunities to add value by helping clients make the right strategic decisions for their business.

Strong bookkeepers have outstanding analytical and communication skills. They can see beyond the numbers to understand the clients' business.

What's this course all about?

This eLearning course is designed to provide bookkeepers and BAS agents with a step-by-step guide to understanding what lies beyond the numbers so they can really engage with their business clients.

Key areas of focus will include:
- The journey from bookkeeper to analyst and advisor
- Looking beyond the numbers
- Principles of financial reporting and client meeting
- Key relationship management.

In completing the course, learners will have a strong understanding of the principles of business analytics and will have prepared their own SMART action plan for professional development.

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

HIGH TECH | SOFT TOUCH

LOOKING BEYOND THE NUMBERS

Bookkeeping is more than being good with numbers. It also means being able to see beyond the numbers to understand what's going in in the client's business, then providing the client with advice and support as they grow their business.

A proactive bookkeeper needs a strong analytical ability, a curiosity about the client and their business and the communication skills to actively engage with clients to help them achieve their business goals.

A firm culture that encourages active sharing of client relationships and information is ALSO essential to better understand and engage with clients. Leaders should encourage their staff to find out more about the world of the clients they are doing work for, through independent research, internal discussions and the opportunity to actively engage with clients.

WHAT'S THIS COURSE ALL ABOUT?

This eLearning course is designed to provide bookkeepers and BAS agents with a step-by-step guide to understanding what lies behind the numbers so they can engage with their business clients in a more meaningful way. Client engagement and project management strategies are also discussed in detail.

Each module includes clear learning objectives, recorded presentations, workbooks, support materials and assessment tasks.

HOW DOES IT WORK?

This self-paced eLearning course is designed to be presented in sequential manner with each module building on the previous module in relation to learning objectives. The course consists of 4 modules with each module containing 2 presentations, workbooks and support materials.

Assessment tasks will encourage and challenge the learner to consider what they can do to improve the way the firm manages clients and workflow.

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

This course is available anytime, anywhere for your administrators through our eLearning portal.

WHO'S IT FOR?

This course is suitable for bookkeepers and BAS agents who want to develop stronger advisory relationships with their business clients. The owners of bookkeeping firms are encouraged to involve all members of their team in this course.

For Registration details:

cpdforaccountants.com.au/courses/business-analytics-for-bookkeepers

COURSE CONTENT

This course consists of 4 modules:

1. The journey from bookkeeper to analyst and advisor

a. Where are you now and where do you want to go?

b. Core principles of proactive bookkeeping to business clients

c. The difference between descriptive and predictive analytics

d. What the business advisory relationship is all about

2. Key areas of focus when looking at the numbers

a. Key financial ratios and other metrics

b. Understanding patterns and trends in the numbers

c. How to check business health and identify underlying causes

d. Predictive analytics and cashflow forecasting tools

3. Principles of financial reporting and client meetings

a. Overview of reporting tools and templates

b. Preparing monthly and quarterly financial reports

c. Development and implementation of SMART action plans

d. How to run an efficient and productive client meeting

4. Key relationship management

a. How to understand what's important to business clients

b. Effective client engagement and communication strategies

c. Key client relationship challenges and how to overcome them.

d. Working effectively with internal and external stakeholders

CPD

This course is worth 16 CPD Hours. A CPD certificate will be provided on completion

Module Structure

Each module includes 2 online presentations and support materials for ongoing reference. It's expected that each module will take around 2 hours for a learner to complete within or outside working hours.

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.

Professional Skills Self-Assessment

At the commencement of the course, learners will be asked to assess their capability in 4 key areas of professional development – Workflow Management, Client Relationships, Team Engagement and Business Development. This self-assessment will provide a benchmark for ongoing review.

SMART Action Plan

A SMART action planning template will be 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.

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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

This course has been a great investment. In time I hope to implement everything I learned, but, to be honest, implementing just some learned points is a big strive forward for my business. This course will help my clients, which in turn, will help my business. Helping my clients improve their businesses is good business for me. This course has been the best professional development I have done to help my clients in this way.
[TM – The Business Analyst]

A great course that encouraged me to really consider what's important to the client. It's not rocket science, just a clearly defined set of steps that will help me better understand the numbers and add value to client relationships.
[FT – The Business Analyst]

I would highly recommend the business analyst course to any firm. The presentations assist in understanding the issues involved and the assessment questions force you to focus on important work areas you don't often allocate time for. Having to draft plans and checklists and note what the delivery to clients would involve ensures the participant and their firm are well placed to introduce new services and advice but on a step-by-step basis. The assessment marking is quick and the feedback is very helpful. The resource guides and workbooks can also be printed and used for future reference.
[MP – The Business Analyst]

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

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