CPDForAccountants
Self-Paced E-Learning Courses

BUSINESS COACHING FOR BOOKKEEPERS

How to engage and coach business clients

A self-paced eLearning course for bookkeepers and BAS Agents working with business clients | 8 Modules | 16 CPD Hours

The emerging role of bookkeeper as business coach

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.

Getting the client across the line with a new service is just the first step. Setting and managing expectations, providing feedback and advice are all essential skills for bookkeepers wanting a stronger business relationship with their clients.

What's this course all about?

This 8-module 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:

1. The journey from bookkeeper to analyst and advisor
2. How to check business health and identify causes
3. Principles of financial reporting and client meetings
4. Effective engagement and communication strategies
5. Overview of financial reporting tools and templates

Learners will develop a practical SMART action plan for ongoing implementation and personal 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

Do you and your team look beyond the numbers to help business clients?

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.

How effective are you in getting clients across the line with additional services?

Convincing a business client to take on additional services can be a challenge when affordability is an issue. You need to be able to take the client on a journey that shows them the true value of ongoing coaching and advice. Once clients can see the value, they're more likely to pay for it.

Do you manage business clients effectively?

Getting the client across the line is just the first step in the journey to being a better business coach. Setting and managing expectations, providing regular feedback and ensuring that the relationship stays fresh are all essential skills for bookkeepers wanting a stronger business relationship with their clients.

WHAT'S THIS COURSE ALL ABOUT?

This 8 module 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.

Each module includes clear learning objectives, recorded presentations, support resources and assessment tasks. Most importantly, learners will put together their own SMART action plan for ongoing implementation.

This course can be complete anytime, anywhere through our eLearning portal. All learners will have access to the course for 12 months following enrolment.

WHO'S IT FOR?

This course is suitable for bookkeepers and BAS agents who want to improve their business analytical skills and develop stronger coaching relationships with their business clients.

For Registration details:

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

COURSE CONTENT

This course consists of 8 modules:

1. **The journey from bookkeeper to analyst and coach**

Module 1

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

b. Core principles of proactive bookkeeping to business clients.

Module 2

a. The difference between descriptive and predictive analytics.

b. What the business coaching relationship is all about.

2. **Key areas of focus when looking at the numbers**

Module 3

a. Key financial ratios and other metrics

b. Understanding patterns and trends in the numbers.

Module 4

a. How to check business health and identify underlying causes.

b. Predictive analytics and cashflow forecasting tools.

3. **Principles of financial reporting and client meetings**

Module 5

a. Overview of reporting tools and templates.

b. Preparing monthly and quarterly financial reports.

Module 6

a. Development and implementation of SMART action plans.

b. How to run an efficient and productive client meeting.

4. **Key relationship management**

Module 7

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

b. Effective client engagement and communication strategies

Module 8

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

b. Working effectively with internal and external stakeholders

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

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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