CPDForAccountants
Self-Paced E-Learning Courses

BUSINESS ANALYTICS FOR CLIENT MANAGERS

How to provide strategic financial advice to business clients

A self-paced eLearning course for accountants, managers and partners working with business clients | 8 Modules | 16 CPD Hours

Accountants need stronger business diagnostic skills

The business analyst can see beyond the past to explore the future world of the client in relation to growth, value, profit and cashflow. Being curious about the numbers can open up immense opportunities for you and your firm to add real value to business clients.

CPA Australia's recent 'Firm of the Future' update recognised that 'accountants need diagnostic skills to interpret financial statements, along with a range of soft skills.'

Do you encourage your accountants and managers to look beyond the numbers?

What's this course all about?

This self-paced eLearning course provides an introduction to the world of analytics for accountants, managers and partners in public practice seeking to develop their diagnostic and business advisory skills.

Over 8 modules, we'll take you on a journey from accountant to analyst and finally to advisor. We'll discuss how to engage business clients at an advisory level.

Finally, we'll help you to develop and implement a SMART action plan focusing on your interests and capabilities and your firm's requirements.

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

HIGH TECH | SOFT TOUCH

cpdforaccountants.com.au | support@cpdforaccountants.com.au | Ph 1300 133 848

SO YOU WANT TO BE A BUSINESS ANALYST?

In the world of accounting, data analysis is playing an increasingly important role in driving better decision making for clients. ACCA's recent report on the future of professional accountants identified that 'expert use of analytics will enable better and close to real time reporting, more predictive analysis and greater interconnectedness of financial and non-financial performance.'

The analyst can see beyond the past to explore the future world of the client in relation to growth, value, profit and cashflow. Being curious about the numbers can open up immense opportunities for you and your firm to add real value to clients.

Data analysis is, however, a lot more than simply filtering data and putting together pretty graphs and tables. It's also about knowing what numbers to use and then understanding what they mean through the clients' eyes.

WHAT'S THIS COURSE ALL ABOUT?

This eLearning course is designed to provide managers and partners 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.

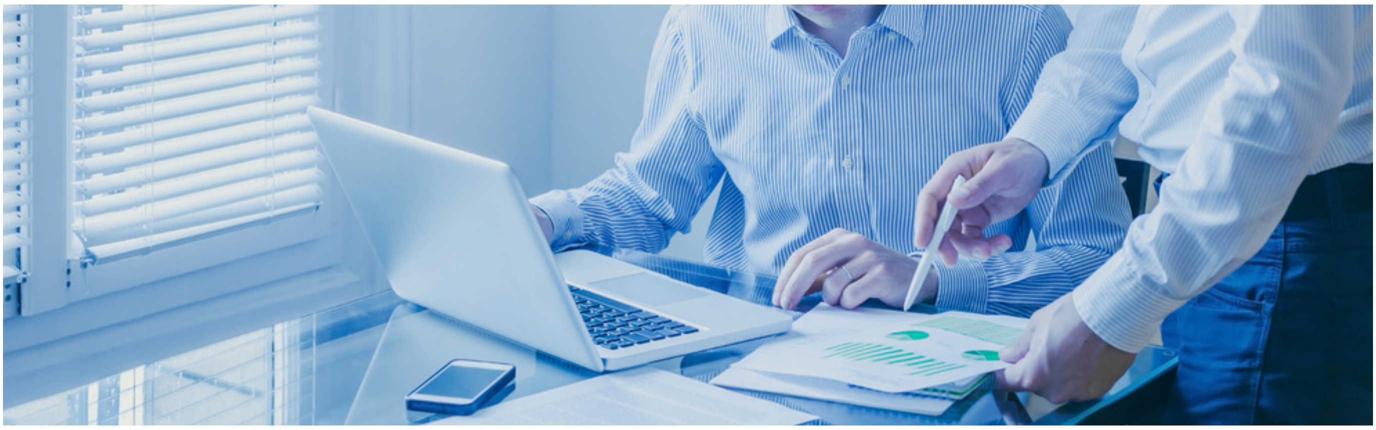
HOW DOES IT WORK?

This course consists of 8 modules with clear learning objectives. Content includes presentations, workbooks, support materials and assessment tasks.

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

WHO'S IT FOR?

This course is suitable for accountants, managers and partners who want to spend more time thinking beyond the numbers and engage their business clients in deeper and broader discussions about their financial future.



For Registration details:

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

COURSE CONTENT

This course consists of 8 modules:

1. The role of Business Analyst

- **a.** The journey from accountant to analyst and advisor
- **b.** Core roles and responsibilities of business analyst
- **c.** Where are you now and where do you want to go?

2. How to look beyond the numbers

- **a.** Core principles of financial analysis
- **b.** Key financial ratios for business health
- **c.** Understanding financial patterns and trends

3. Small business financial analysis

- **a.** How to identify underlying causes
- **b.** Business potential analysis
- **c.** Budgeting and forecasting essentials

4. Engaging the business client

- **a.** Options for the business health check
- **b.** Getting clients across the line
- **c.** The first 12 months of an advisory project

5. Key relationship management

- **a.** Keys to setting and managing expectations
- **b.** Preparing monthly and quarterly reports
- **c.** Running effective business meetings

6. Operational systems and tools

- **a.** Tools for business analysis and reporting
- **b.** How to add value to business reporting
- **c.** Principles of effective delegation and leverage

7. How to keep the business relationship alive

- **a.** A formal process for regular review and feedback
- **b.** Bringing new ideas and concepts into play
- **c.** Re-aligning the scope to new circumstances

8. Your professional development action plan

- **a.** Review of your personal SMART action list
- **b.** Development of a 12-month action plan
- **c.** Regular review and follow-up process

CPD – This course is worth 16 CPD Hours

Each module includes an online presentations and support materials.

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.

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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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