

Graduate Accountant Induction | Learning Objectives and Assessment tasks

Module	Core Topic	Learning objectives	Assessment tasks
1	How to take control of accounting workflow	<ol style="list-style-type: none"> 1. Understand the role of the proactive accountant in managing workflow and client relationships 2. Explore what 'client engagement' means in relation to scope of work and fee for service 3. Explore key issues relating to management of work in progress (WIP) 	<ol style="list-style-type: none"> 1. Explore your firm's approach to workflow management. What systems does the firm use? Are processes documented? Start with the work you are expected to complete at this time. 2. Develop a checklist to monitor the key steps in delivering jobs on time, within budget. What could you do to manage the time cost budget associated with the jobs you complete? 3. Identify one job you have recently completed. What was the time-cost associated with that job? How did this compare with your manager's expectations? [if you have not yet started, add this to the SMART action list) 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module. Discuss these with your manager.
2		<ol style="list-style-type: none"> 1. Understand the importance of effective WIP management in taking control of 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 	<ol style="list-style-type: none"> 1. Identify key strategies that you could use to be more proactive in following up your manager or clients for information required to complete jobs. 2. Identify one recent job you 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.

		management and develop solutions	4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module.
3	How to effectively engage with the firm's clients	<ol style="list-style-type: none"> 1. Understand the principles of client service excellence in accounting firms 2. Identify the firm's expectations of you in relation to client relationship management 3. Explore your current communication with clients and develop strategies to enhance this level of engagement 	<ol style="list-style-type: none"> 1. Does your firm have a client service charter (a statement of how client relationships are managed)? If not, consider as a starting point how accountants are expected to respond to client queries or requests. 2. What expectations does your manager have in relation to written or verbal communication with clients? How will this change in the next couple of years? 3. Identify one core communication skill that you need to develop in your role. What actions can you take now? What will this mean to the way you communicate with clients in the future? 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module.
4		<ol style="list-style-type: none"> 1. Understand the difference between what clients need and what they really want 2. Identify the questions you can ask yourself, your manager and your clients to better understand their needs and wants 3. Identify core accounting and advisory services that focus on the future 	<ol style="list-style-type: none"> 1. As a young accountant, what can you do to help the firm manage client expectations in relation to engagement, communication and proactivity? 2. Develop a simple personal checklist to help you better understand client needs. What questions would you like to ask? Where can you get this information? 3. Explore the tools that the firm has available to look 'into the future.' How are these tools currently used with clients to help them set strategic goals 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module.

5	How to work collaboratively with colleagues	<ol style="list-style-type: none"> 1. Identify key steps to engage collaboratively with business colleagues on a day to day basis 2. Review your working relationship with colleagues within the administrative team 3. Understand the core principles of project and task management as they apply to your role as a young accountant. 	<ol style="list-style-type: none"> 1. Describe at least 5 ways that you collaborate with the people around you on a day to day basis. How effective is this collaboration? What could be improved? 2. Investigate the collaborative tools available to you and the people with whom you work. Identify 3 ways to improve the effectiveness of these tools. 3. Identify a recent situation where you were unable to complete a job within the allocated timeframe. What were the issues? What could you have done differently? 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module.
6		<ol style="list-style-type: none"> 1. Critically explore the firm's expectations of you in relation to KPIs and professional development 2. Consider how you work with your manager in relation to expectations 3. Understand the principles of effective delegation and your role in managing tasks given to you 	<ol style="list-style-type: none"> 1. Identify the top 3 expectations of you internally. These may be visible through key performance indicators, coaching discussions or professional development goals. How do you manage these expectations? What could be improved? 2. Review the 7 key steps for effective delegation. In receiving tasks, what can you do differently to better manage the expectations of your manager? 3. Explore a recent situation in which you received critical feedback for work completed or results achieved. How did you respond to the feedback? What could be improved? 4. Identify at least 3 personal, team or firm SMART actions you will implement as a result of your learnings.
7	How to take control of projects, tasks and activities	<ol style="list-style-type: none"> 1. Understand the key principles of effective time management in a professional service environment. 	<ol style="list-style-type: none"> 1. Review your approach to daily and weekly planning. Establish a simple weekly planner that divides your day into 2 hour intervals.

		<ol style="list-style-type: none"> 2. Put in place steps to take control of your work environment by managing interruptions 3. Identify your personal time management challenges and develop potential solutions 	<ol style="list-style-type: none"> 2. Identify the key types of interruptions you experience in day-to-day work. Estimate the time lost as a result of these interruptions. [you may want to keep a personal log for a week before you answer this task] 3. With the top 3 sources of interruption, develop strategies to take more control of your work environment to reduce interruptions. 4. Identify at least 3 SMART actions you will implement as a result of your learnings. Add to your consolidated SMART action list.
8		<ol style="list-style-type: none"> 1. Understand the key principles of effective personal goal setting 2. Put in place a personal action plan based on your learnings and SMART actions from this program 3. Share your personal SMART actions with your manager and other relevant colleagues 	<ol style="list-style-type: none"> 1. Ensure that your consolidated SMART action list is up to date. Check priorities, responsibilities and deadlines. Share with your manager 2. Identify which SMART actions will require firm support or approval to proceed e.g. changes to systems or processes. Discuss these with your manager 3. Identify the top 3 potential roadblocks to implementation of your actions. Outline what you will do to address these roadblocks in a proactive manner. 4. Establish your 90 day action plan. Confirm the initial 5 SMART actions, outline what needs to happen and keep track of progress through your personal task management system