CPDForAccountants
Self-Paced E-Learning Courses

THE ULTIMATE PRACTICE MANAGER

Best Practice Guide to Workflow, Clients, Teams and Business

A self-paced eLearning course for practice managers, principals, directors and partners in public practice | 8 modules | 16 CPD Hours

Is your accounting or advisory firm up to date with management techniques and best practice?

The accounting and financial advisory industry is changing rapidly.

- Workflow is increasingly automated and streamlined to create capacity for growth.
- Clients want holistic and strategic financial support from their external advisors.
- Team structures are leveraged to ensure responsibilities are aligned with skills
- Staff at all levels are trained to take on responsibility for clients and workflow
- Business development increasingly focuses on value beyond tax compliance

Is your firm in a strong position to take advantage of these opportunities and deal effectively with challenges?

How will this course help you to take control of your firm?

This course is designed to provide practice managers, principals and partners with the opportunity to critically review firm health at an operational and strategic level.

This course will help you to:

- Challenge your current approach to practice management
- Explore industry best practice in relation to technology
- Plan effectively for the future growth and profit of your firm
- Engage key stakeholders in your firm in strategic planning
- Develop your personal practice management plan

WHEN WAS THE LAST TIME YOU CRITICALLY REVIEWED THE WAY YOUR FIRM OPERATES?

Any successful accounting or financial advisory firm knows how important it is to have strong internal systems and processes. With technology playing an ever-increasing role in streamlining workflow processes, the leaders of accounting and advisory firms now have the opportunity to take a step back from compliance-focused activities to identify what will best add value to clients and staff.

This course is intended to challenge the way your firm currently manages its people and its clients. We'll encourage you to step outside your comfort zone and put in place actions to make your firm both sustainable and competitive in the years ahead.

This course builds on over 20 years of experience working with staff and clients of accounting and financial advisory firms to achieve great results.

HOW DOES THIS COURSE WORK?

This self-paced eLearning course will run over 8 modules, each consisting of:

1. A recorded presentation
2. Workbook and support materials
3. Assessment tasks

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.

Learners will develop and implement their own SMART action with feedback from our course presenters and your leadership team. Regular review of progress is ensured through commitment to completing the course in a timely manner.

WHO SHOULD ENROLL IN THIS COURSE?

- Both new and experienced practice and operations managers will benefit from the opportunity to critically review firm health at an operational and strategic level.
- This course is also suitable for principals, directors and partners directly involved in strategic planning and operational management.

For Registration details:

cpdforaccountants.com.au/courses/practice-manager

COURSE CONTENT

This course consists of 8 modules:

1. Planning for your firm's future

1. Business role and responsibilities
2. Relationship with partners and colleagues
3. Your professional development plan
4. Key current areas for business focus

2. Leveraging technology for workflow

1. Develop a workflow plan for your business
2. A focus on throughput of work
3. Workflow management and tracking
4. IT systems to improve efficiency

3. Collaborating effectively with clients

1. Develop a client management plan for your business
2. Client engagement – scope and fee for service
3. A service quality program for your firm
4. Effective management of client issues

4. Creating real power with people

1. Develop a people plan for your business
2. Structure, capacity and leverage issues
3. Learning and professional development
4. Recruitment and retention strategies

5. Implementing strategies for growth

1. Develop a marketing plan for your business
2. Firm branding and positioning
3. Online marketing strategies
4. Referral and networking strategies

6. Achieving financial health and security

1. Develop a financial plan for your firm
2. Profit and cashflow management
3. WIP and debtor management
4. Expense management

7. Developing better business strategies

1. Develop a business plan for your firm
2. Fast track growth strategies
3. KPIs for your firm and employees
4. Getting buy-in for key projects

8. Managing risk through better governance

1. Management and board meetings
2. QC and risk management strategies
3. Business financial reporting
4. Succession and career development

CPD – This course is worth 16 CPD 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.

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.

For Registration details:

cpdforaccountants.com.au/courses/practice-manager

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 OUR LEARNERS

I enjoyed every module of this course. It has really helped me at work. It is practical. I'm using all the tools that were provided and everything I have learned. I recommend this course very highly.

This course provided everything we were looking to get out of it for not only our Administration team, but also for our technical team. It was very eye-opening as to what we needed to improve as a firm and I will highly recommend this course to anyone thinking of participating.

This course provided me with very informative and easy to follow knowledge and skills to be able to run a practice as a Manager or Partner.

This course really made me think outside the square and challenged my thinking in a variety of ways. I have learned so much and have thoroughly enjoyed every part of it.

This course opened my eyes regarding my duties and helped me question the way i manage overall tasks surrounding compliance, managing teams/individuals, freeing up time and task sharing.

This has been just the thing I need to get myself more organised and actually set up a more streamlined firm. I had tried in the past however a lot was still in my brain which needs to come out and onto paper/computer.

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

For Registration details:

cpdforaccountants.com.au/courses/practice-manager