

COURSE COMPETENCIES

			PD - FROM GRADUATE TO PARTNER							PRACTICE ADMINISTRATION							BUSINESS ADVISORY SERVICES				SHORT COURSES			
CATEGORY	Competency	Course	GAI	TPA	TPM	TCM	TLM	PTP	BFB	GTD	CSA	CC	PP	MA	ASIC	UPM	BCB	BAM	VCFOE	VCFOA	GBC	TRE	PSA	YBF
		CPD Hr	8	16	16	10	8	16	12	8	10	12	10	12	9	8	8	8	8	8	2	2	2	2
WORKFLOW	Managing scope of work		F	A	A	A		A		I	I	A	A			I	F	I	I	A	I		I	I
	Job budgeting and WIP review		F	A	A	A		A		I	I	A	A			I	F	I	I	A	I			
	Scheduling and throughput of work		F	A	A	A		A		I	I	A	A			I	F	I	I	A	I			
TEAM	Team coaching and supervision		F	I	A		A	A		I	I					I	F							
	Task Delegation and leverage		F	I	A		A	A		I	I					I	F							
	Professional development		F	I	A		A	A		I	I					I	F							
CLIENTS	Understanding client needs		F	I	A	A		A	A	I	F	A	A			I	F	A	I	A	I	I	I	I
	Client engagement strategies		F	I	A	A		A	A	I	F	A	A			I	F	A	I	A	I	I	I	I
	Client communication strategies		F	I	A	A		A	A	I	F	A	A			I		A	I	A	I	I	I	I
GROWTH	Business planning			F	I			A	A		F			A		I								
	Professional partnerships			F	I			A	A		F			A		I								
	Marketing strategies			F	I			A	A		F			A		I	F	F	F	F		I	I	
ADMINISTRATION	Time and task management		F		I			A		I	F					I	F		F	I				
	Financial management		F		I			A		I	F					I	F		F	I				
	Systems and Process Management		F		I			A		I	F					I	F		F	I				
TECHNICAL	ASIC Management													A										

COURSE LEVELS	
Foundation	F - Foundation
Intermediate	I - Intermediate
Advanced	A - Advanced

COURSE CODES			
GAI	Graduate Accountant Induction	GTD	Getting things done
TPA	The Proactive Accountant	CSA	Client service administrator
TPM	The Proactive Manager	CC	Client connect for professional firms
TCM	The Client Manager	PP	Pricing policies for professional firms
TLM	Team Leader Masterclass	MA	Marketing administrator
PTP	Path to Partnership	ASIC	The responsible ASIC registered agent
BFB	Build your fee base	UPM	The Ultimate Practice Manager
BCB	Business coaching for bookkeepers	GBC	Good and bad clients
BAM	Business analytics for managers	TRE	The referral engine
VCFOE	Virtual CFO Essentials	PSA	Professional selling
VCFOA	Virtual CFO Advanced	YBF	You've been framed