



THE RESPONSIBLE WORKFLOW MANAGER

Transform your Practice with 21st Century Workflow Processes & Tools

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

Is your accounting or advisory firm up to date with workflow management systems, processes and software tools?

Key questions progressive workflow managers should be asking:

- Do we have the ability to see how much work is available and what the team is doing?
- Do we have enough internal capacity to fulfill existing commitments and new engagements?
- Do we have a consistent approach to workflow or are our people working independently?

Is your firm in a strong position to use technology and digitisation to improve capacity and production of work?

Are you taking positive steps to overcome resistance from staff and clients in developing a standard approach to workflow management?

How will this course help you take control of workflow management in your firm?

Leverage of resources and workflow has never been a more important issue for accounting and advisory firms. Technology and digitisation of systems and processes has allowed progressive firms to streamline compliance workflow and focus on advice to clients.

This eLearning course will help you to:

- Challenge your current approach to workflow management
- Explore all options for the use of technology and processes to improve workflow management
- Engage partners and managers in taking control of workflow

You will begin this course with a workflow audit and end with a documented workflow management plan for your practice.

WHEN WAS THE LAST TIME YOU LOOKED CRITICALLY AT YOUR WORKFLOW MANAGEMENT SYSTEMS AND PROCESSES?

An accounting or advisory firm can always benefit from improved workflows and processes. But to improve workflow management, it's imperative to examine the base processes that make up the workflow.

Usually, these processes have been randomly and unevenly applied throughout the years, meeting needs as they happen. In most cases, a workflow practice may have come about due to convenience in the moment rather than a formal attempt to improve the accuracy and efficiency of work over time.

This course challenges the way your firm currently manages its workflow. It looks at clients, people, systems, processes and technology to provide a framework for workflow management in the 21st Century.

We'll encourage you to step outside your comfort zone and put in places actions to make workflow production in your firm more efficient, accurate and reliable.

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 ENROL IN THIS COURSE?

Both new and experienced workflow and practice managers will benefit from the opportunity to critically review their firm's approach to workflow management.

This course is also suitable for principals, directors, partners and managers involved in the management of workflow in your firm.

For Registration details:

cpdforaccountants.com.au/courses/workflow-manager

COURSE CONTENT

This course consists of 8 modules:

A 21st Century Introduction to Workflow

How Accounting and advisory firms have evolved

Module 1 21st Century Workflow

- Explore key workflow processes in accounting and advisory firms
- Understand the role and responsibilities of Workflow Manager

Module 2 Your firm's Health Check

- Explore common workflow management issues and challenges
- Complete your firm's Workflow Management Audit

Core Principles of Workflow Management

How to establish strong systems and processes

Module 3 Workflow Responsibilities

- Who's responsible for what - Assigning work and spheres of influence
- Develop work-in, Job budgeting, review and work-out procedures

Module 4 Explore the Flow of Work

- Manage the scheduling and through-put of work
- Implement workflow tracking, KPI reports and production meetings

The Psychology of Workflow Management

How to work with humans to get things done

Module 5 Take Control of Clients

- Focus on client engagement, on-boarding and communication
- Understand the difference between compliance and advisory workflow

Module 6 Manage Workflow Issues

- Deal effectively with resource and capacity issues
- Use Agile to overcome workflow bottlenecks and roadblocks

Workflow Technology and Automation

How to effectively implement technology in your firm

Module 7 Explore Software Options

- Identify all software tools for workflow management
- Implement digitisation of workpapers and processes

Module 8 Manage People Effectively

- Hierarchy vs Holacracy and Collaboration for effective workflow
- Deal with resistance to change with workflow processes

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.

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OUR LEARNING PROCESS

Our self-paced eLearning courses follow a 4-step process in relation to learning objectives:



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 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 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 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 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 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

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cpdforaccountants.com.au/courses/workflow-manager