CPDForAccountants
Self-Paced E-Learning Courses

CLIENT CONCIERGE

Elevating Client Service Administration to the Next Level

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

Is your professional service firm really equipped to manage client relationships in a proactive and engaged manner?

With the emergence of digital disruption and advancements in artificial intelligence (AI), the client service industry is experiencing rapid changes. Client expectations have shifted, and businesses need to adapt quickly to keep up.

Key questions progressive partners and administrators should be asking include:

- Are we taking control of client relationships from the outset? Do we manage our clients or do they manage us?
- Do we really know our clients? Do our clients really know what they want?
- Do all team members understand their role in communicating proactively with clients?

How will this course help you to elevate client service administration to the next level?

The Client Concierge eLearning Course will help your firm elevate client service administration to the next level. By enrolling in this course, you will:

- Learn the essential skills needed to succeed in a Client Concierge role
- Understand the impact of digital disruption and AI on the client service industry
- Develop strategies for effective client onboarding and engagement
- Learn how to manage client relationships effectively
- Develop skills to reach out to clients and boost your marketing efforts

This course will equip you with the skills and knowledge needed to succeed in this evolving landscape.

IS YOUR PROFESSIONAL FIRM KEEPING UP WITH THE RAPIDLY EVOLVING CLIENT SERVICE INDUSTRY?

Most accounting and advisory firm can claim that they service their clients well. However, client engagement is still to a large extent reactive with communication based on production requirements rather than a need or desire to engage in proactive and collaborative communication.

With the transition from compliance to advice in business relationships, there's both the need and the opportunity to take client relationship management to the next level.

- To keep up with the rapidly evolving client service industry, businesses need to leverage technology to streamline their operations and enhance their customer experiences.
- Keep pace with client expectations, businesses need to develop an omni-channel approach that allows clients to interact with them through various channels seamlessly.
- In addition, businesses must invest in robust customer relationship management systems that can collect and analyse customer data to identify trends and opportunities for improving customer service.
- By embracing technology, businesses can provide clients with better, faster, and more personalized services, which can result in higher customer satisfaction and loyalty

This course challenges the way your firm manages its clients. It looks at client engagement, communication and review to provide a framework for client relationship management in the 21st Century.

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 administrators and their teams will benefit from the opportunity to critically review their firm's approach to client relationship management. This course is also suitable for principals, directors, partners and managers involved in the managing client relationships.

For Registration details:
cpdforaccountants.com.au/courses/client-concierge

COURSE CONTENT

This course consists of 8 modules:

1. Introduction to Client Concierge

- Understand the role and importance of Client Concierge
- Learn the key skills required for Client Concierge
- Get an overview of the course content

2. Client Onboarding and Engagement

- Define client onboarding and why it is important
- Discover best practices for successful client onboarding
- Explore strategies for effective client engagement

3. Client Relationship Management

- Learn about the client lifecycle and how this relates to engagement
- Develop effective communication and relationship-building strategies
- Discover how to manage client expectations and complaints

4. Client Feedback and Review Procedures

- Understand the importance of client feedback for business success
- Discover how to collect and analyse client feedback
- Learn how to implement action plans based on client feedback

5. Client Connections and Marketing

- Develop a proactive client contact strategy
- Create effective marketing messages for clients
- Learn how to measure the effectiveness of client contact and marketing efforts

6. CRM Business Systems and Processes

- Discover how to create efficient and effective client communication systems
- Learn how to streamline client service admin processes
- Explore how to maximise productivity through automation and delegation

7. Developing a Client Service Charter

- Understand the benefits of a client service charter
- Learn about the key elements of a successful client service charter
- Discover strategies for implementing a client service charter

8. Putting it All Together

- Review the key concepts covered in the course
- Develop a personalized action plan for elevating client service administration
- Get tips for ongoing improvement and success

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:

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

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.

I felt that all the modules work very well together and flow on from each other. I have learned that it is ok to be outside your comfort zone and that the importance of a client centric focus in the office. After all, if we don't have the ability to exceed the clients expectations then there is no obligation or reason for the client to stay with the firm.

Thanks, this has been a really good course. The content has highlighted some important issues and helped me with communicating and managing my interactions with my clients during this unusual year.

This course was not only valuable to the administrative team, but helped the whole firm in developing systems and processes to really manage client relationships and workflow in a proactive way. The SMART actions are a great way to convert theory into practice. Thanks for a great course.

Well-structured and written course with timely responses as you progress through each module. The modules have given me the ability to discuss with the other partners and staff a range of ideas that may have been overlooked and underestimated in importance.

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.

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

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