



BUSINESS DEVELOPMENT MANAGER 2023/24 FY

Growth Strategies for Partners and Managers in Public Practice

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

Is your firm looking to grow significantly in the next 12 months?

A focus on fee growth can be one of the most challenging skills to master, especially when the focus in early years of PD has been on the acquisition of technical skills and competence in managing workflow.

- What are the firm's expectations of you in relation to fee growth?
- Do your KPIs include a reference to 'business growth' activities?
- Do you feel confident in taking a leading role in helping your firm to achieve its financial goals?
- Are you confident that you have the skills to identify new services for existing clients and get them across the line?

For partners and managers aspiring to partnership, demonstration of business growth skills is an essential part of adding value to clients and to the firm.

How will this course help you to elevate your BD skills to the next level?

The Business Development Manager eLearning Course will help you and your firm to achieve the growth targets you have established for the next 12 months.

By enrolling in this course, you will learn how to:

- Develop a strategic growth plan for you and your firm
- Develop effective client relationships
- Attract new clients to the firm
- Leverage your personal brand
- Embrace online marketing apps
- Enhance client retention strategies
- Measure and Monitor growth success
- Provide valuable insights to clients for their growth

This course will equip you and your firm with the skills and knowledge needed to achieve real growth objectives over the next 12 months.

HOW WILL THE BDM ELEARNING COURSE HELP YOU AND YOUR FIRM ACHIEVE YOUR GROWTH TARGETS?

By enrolling in this course, you'll gain invaluable insights into building strong client relationships, which can lead to increased client retention and referrals. Additionally, you'll learn the latest marketing strategies to boost your firm's visibility and attract new clients in the digital age.

This course will equip you with the skills to leverage technology for seamless client engagement, ensuring you stay ahead of the competition. Furthermore, you'll discover how to measure and monitor key performance indicators to drive your growth objectives.

Course highlights:

- Master communication and trust-building techniques to provide exceptional client service and handle challenging situations with confidence.
- Identify target niches and create compelling value propositions, while exploring networking and referral strategies to grow your client base.
- Harness the power of digital marketing, build a strong online presence, and utilize social media and content marketing to showcase your expertise.
- Discover how to use client portals, CRM systems, cloud-based accounting software, and virtual meetings for efficient client engagement.
- Create personalized client retention plans, deliver value-added services, and utilize client feedback to build long-lasting loyalty.
- Learn to identify and track relevant KPIs, analyse financial data, and use data-driven insights to make informed business decisions.
- Prepare comprehensive financial reports and provide valuable insights to clients for their growth.
- Develop a strategic growth plan, explore expansion opportunities, and build a strong team to support your practice's expansion.

WHO SHOULD ENROL IN THIS COURSE?

This course is designed for principals, directors, partners and managers who want to contribute to business growth with existing and new clients.

For Registration details:

cpdforaccountants.com.au/courses/bdm

COURSE CONTENT

This course consists of 8 modules:

1. Building Strong Client Relationships

- Understanding the importance of client relationships in accounting practice
- Effective communication and active listening skills
- Developing trust and rapport with clients
- Handling challenging client situations and conflicts
- Providing exceptional client service and managing expectations

2. Identifying and Attracting New Clients

- Identifying target client segments and niches
- Creating a compelling value proposition for potential clients
- Implementing lead generation strategies
- Networking and building referral networks
- Conducting successful client onboarding processes

3. Online Marketing Initiatives for Accounting Firms

- Harnessing the power of digital marketing for accounting practices
- Building an effective website and optimizing it for conversions
- Leveraging social media platforms for brand awareness and engagement
- Content marketing strategies to showcase expertise and attract prospects
- Running successful online advertising campaigns

4. Leveraging Technology for Client Engagement

- Understanding the role of technology in modern accounting practices
- Utilizing client portals for secure communication and document sharing
- Integrating CRM systems to manage client interactions
- Using cloud-based accounting software for real-time collaboration with clients
- Exploring virtual meetings and webinars for remote client engagement

5. Client Retention and Loyalty Strategies

- Understanding the value of client retention for long-term growth
- Developing personalized client retention plans
- Engaging clients through regular check-ins and value-added services
- Seeking and acting on client feedback for continuous improvement
- Recognizing and rewarding client loyalty

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COURSE CONTENT

This course consists of 8 modules:

6. Key Performance Indicators (KPIs) for Business Growth

- Identifying relevant KPIs for measuring accounting practice performance
- Tracking and analysing client acquisition and retention metrics
- Evaluating the effectiveness of marketing initiatives
- Financial KPIs for monitoring revenue, profitability, and cash flow
- Leveraging data-driven insights to make informed business decisions

7. Financial Reporting and Performance Analysis

- Preparing comprehensive financial reports for clients
- Interpreting financial data to provide valuable insights
- Identifying potential growth opportunities for clients
- Conducting financial forecasting and scenario analysis
- Communicating financial information effectively to clients

8. Business Development and Scaling Strategies

- Developing a strategic growth plan for the accounting practice
- Identifying expansion opportunities and new service offerings
- Setting achievable growth targets and timelines
- Delegating responsibilities and building a strong team
- Managing risks and challenges during the scaling process

HOW DOES THIS COURSE WORK?

This self-paced eLearning course will run over 8 modules, each consisting of a recorded presentation, workbook and supporting materials.

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

This course is worth 16 CPD hours.

For Registration details:

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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

This course was both interesting and practical. As I was completing the assessment, I was surprised at how I could easily incorporate the learnings into my practice without a massive investment of time / money – as it sometimes the small changes that can still have incredible impact for my clients. This course encourages you to think about scaling any roll out so you don't need to feel overwhelmed about the task ahead. Well done.

This has been a very interesting and thought-provoking course. I have picked up so many great ideas to explore and implement into our accounting firm. I have enjoyed the self-paced format, along with the videos and downloadable resources. The marking of assessments has been extremely efficient with some good feedback too. I would recommend this course for anybody in a team leadership role.

I've thoroughly enjoyed this course, thank you for your support and assistance throughout. I definitely have learnings that I will be able to apply to the coming financial year and highly recommend this to other managers looking to understand what a Practice Managers role consists of. Thanks.

This was a really good course. Lots of excellent takeaways that can be used quite easily in business. The information flows nicely and covers a vast range of issues in a neat, easy to use package. I would highly recommend this to all accounting professionals at any level.

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.

For more course feedback, visit:

cpdforaccountants.com.au/course-feedback

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cpdforaccountants.com.au/courses/bdm