



# INSOLVENCY PRACTITIONER STRATEGIES FOR GROWTH & EXPANSION

A self-paced eLearning course for liquidators, administrators and receivers in public practice | 8 modules | 16 CPD Hours

## Are you seeking to boost your firm's approach to business development?

Navigating the complexities of business growth can be daunting, particularly when early professional development focuses predominantly on technical skills and workflow management.

- Does your firm have clear growth strategies in place?
- How does your firm envision your role in driving fee growth?
- Do your Key Performance Indicators (KPIs) emphasise 'business growth' activities?
- Are you equipped to confidently lead your firm towards its financial objectives?
- Do you possess the skills to uncover and successfully implement new services for existing clients?

For insolvency practitioners, particularly partners and managers eyeing partnership, demonstrating business growth capabilities is crucial for enhancing client value and firm success.

## How will this course help you to elevate your firm's business growth skills?

The **Insolvency Practitioners: Strategies for Growth & Expansion** eLearning Course is tailored to bolster the development of insolvency practices.

This course will guide you in:

- Creating a strategic growth plan specific to insolvency services.
- Cultivating strong relationships with business networks and clients
- Enhancing your professional brand within the insolvency niche.
- Utilising online marketing tools effectively for niche targeting.
- Tracking and assessing your firm's growth in insolvency services.
- Offering valuable, strategic insights to clients for their recovery and growth.

This course equips insolvency practitioners with essential skills and knowledge for tangible growth in their field.

This course has been developed in conjunction with Insolvency Australia, Australia's Marketplace for Insolvency Solutions  
Visit [insolvencyaustralia.com.au](https://insolvencyaustralia.com.au)

**INSOLVENCY**  
AUSTRALIA

# HOW WILL THIS 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 utilise 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 personalised client retention plans, deliver value-added services, and utilise 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.
- Develop a strategic growth plan, explore expansion opportunities, and build a strong team to support your practice's expansion.

## 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?

This course is designed for insolvency practitioners (liquidators, administrators and receivers) who are expected to contribute to business growth with existing and new clients.

This course is also suitable for partners and managers in accounting firms who are seeking to support their clients in distress.

**For Registration details:**

[cpdforaccountants.com.au/courses/insolvency-growth](https://cpdforaccountants.com.au/courses/insolvency-growth)

# COURSE CONTENT

This course consists of 8 modules:

## 1. Identifying & Attracting New Clients

Learning objectives:

- 1. Identify businesses in financial distress or at risk of insolvency:** Learn how to spot potential clients in need of insolvency services.
- 2. Craft a value proposition that resonates with your marketplace:** Develop messaging that aligns with the needs of distressed businesses.
- 3. Implement targeted lead generation strategies for insolvency services:** Strategies for finding and reaching out to potential clients.
- 4. Network with financial advisors and lawyers for referrals:** Build a referral network with professionals who can direct clients your way.
- 5. Execute client onboarding that addresses specific client needs:** Onboarding processes tailored to the insolvency sector

## 2. Building Strong Client Relationships

Learning objectives:

- 1. Grasp the critical role of trust in insolvency situations:** Explore why trust is the cornerstone of professional practice and how to establish it from the outset.
- 2. Master nuanced communication tailored to client needs:** Learn communication strategies that resonate with clients in financial distress.
- 3. Develop rapport with clients facing financial hardship:** Techniques to build connections with clients under pressure.
- 4. Navigate complex client emotions and conflicts in insolvency:** Guidance on managing the emotional landscape of insolvency.
- 5. Deliver exceptional service by managing crisis expectations:** Create a framework for managing client expectations during a financial crisis.

## 3. Online Marketing Initiatives for Insolvency Firms

Learning objectives:

- 1. Utilise digital marketing to reach companies in need of insolvency services:** Leverage the digital landscape to connect with your target market.
- 2. Optimise your firm's website for those seeking insolvency advice:** Improve your website to attract and convert visitors into clients.
- 3. Engage with businesses on social media platforms:** Use social media to build relationships with potential clients.
- 4. Develop content that positions your firm as a thought leader:** Content strategies to establish your expertise.
- 5. Run online advertising campaigns targeting businesses showing signs of financial distress:** Effective online advertising tactics to reach your audience.

## 4. Leveraging Technology for Client Engagement

Learning objectives:

- 1. Understand tech solutions pertinent to client engagement strategies:** Overview of technology that can benefit insolvency practitioners.
- 2. Use client portals for sensitive information exchange during insolvency proceedings:** Implement secure client portals.
- 3. Implement CRM systems for tracking potential client opportunities:** CRM strategies to manage client information and signals.
- 4. Collaborate effectively using cloud-based software:** Utilise cloud solutions for collaboration and efficiency.
- 5. Utilise virtual meetings for discreet and efficient client interactions:** Embrace virtual meetings for client convenience and discretion.

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# COURSE CONTENT

This course consists of 8 modules:

## 5. Client Retention & Loyalty Strategies

Learning objectives:

- 1. Recognise the importance of client retention:** Understand why keeping clients is as crucial as finding new ones.
- 2. Create retention plans that consider the unique nature of insolvency cases:** Tailor client retention strategies to the insolvency process.
- 3. Engage with past clients to assist with post-insolvency recovery:** Keep in touch with former clients to help them rebuild.
- 4. Use feedback from insolvency cases to refine service offerings:** Learn from each case to improve your services.
- 5. Develop loyalty initiatives for clients who have successfully navigated insolvency:** Loyalty programs for clients who have emerged from insolvency.

## 6. Key Performance Indicators (KPIs) for Business Growth

Learning objectives:

- 1. Identify KPIs relevant to insolvency practice success:** Determine which metrics matter for your practice.
- 2. Analyse client acquisition and retention strategies for professional firms:** Deep dive into acquisition and retention metrics.
- 3. Assess the impact of marketing efforts on insolvency service uptake:** Evaluate how your marketing affects your business.
- 4. Monitor financial health of the firm through targeted KPIs:** Keep an eye on your firm's financial performance.
- 5. Use data insights to guide strategic decisions in insolvency practice:** Data-driven decision-making for strategic planning

## 7. Financial Reporting & Client Communication

Learning objectives:

- 1. Enhance client communication using financial reports:** Tailor reports for clarity and client engagement.
- 2. Strategic financial data interpretation:** Apply financial insights for insolvency resolution and advisory services.
- 3. Growth identification post-insolvency:** Recognise client business growth opportunities during recovery.
- 4. Advisory-driven financial forecasting:** Forecast to identify future advisory and growth avenues.
- 5. Simplify complex financial situations for stakeholders:** Communicate intricate financial data in understandable terms.

## 8. Business Development & Scaling Strategies

Learning objectives:

- 1. Formulate growth strategies for the insolvency practice:** Planning for the growth of your practice.
- 2. Spot opportunities for service diversification within the insolvency realm:** Identify new service areas within insolvency.
- 3. Set realistic growth targets post-insolvency engagements:** Set achievable goals for your firm's expansion.
- 4. Delegate responsibilities effectively in the context of a growing insolvency practice:** Manage your team for optimal growth.
- 5. Manage risks inherent to scaling an insolvency-focused firm:** Risk management strategies for expanding firms.

Through this comprehensive eLearning course, participants will gain the strategic know-how and practical tools required to drive their insolvency practices forward, ensuring they are well-prepared to meet and exceed the challenges of client acquisition and retention in the insolvency sector.

This course is worth 16 CPD Hours. A CPD certificate will be provided on completion.

For Registration details:

[cpdforaccountants.com.au/courses/insolvency-growth](https://cpdforaccountants.com.au/courses/insolvency-growth)

## COURSE STRUCTURE

This course consists of 8 modules and provides the learner with 16 CPD Hours on successful completion.

Each module includes an online presentation and support materials for ongoing reference. It's expected that each module will take around 2 hours for a learner to complete within or outside working 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 will be 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.

- 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.

## FEEDBACK FROM OUR LEARNERS

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

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

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](https://cpdforaccountants.com.au/course-feedback)

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