

COURSE COMPETENCIES

			PD - FROM GRADUATE TO PARTNER						PRACTICE ADMINISTRATION							
CATEGORY	Competency	Course	GAI	TPA	TPM	TCM	TLM	PTP	GTD	CSA	CC	PP	MA	ASIC	UPM	RWM
		CPD Hr	16	32	32	20	16	32	16	20	16	20	24	18	16	16
WORKFLOW	Managing scope of work		F	I	A	A		A	I	I	A	A			I	A
	Job budgeting and WIP review		F	I	A	A		A	I	I	A	A			I	A
	Scheduling and throughput of work		F	I	A	A		A	I	I	A	A			I	A
TEAM	Team coaching and supervision		F	I	A		A	A	I	I					I	
	Task Delegation and leverage		F	I	A		A	A	I	I					I	
	Professional development		F	I	A		A	A	I	I					I	
CLIENTS	Understanding client needs		F	I	A	A		A	I	F	A	A			I	
	Client engagement strategies		F	I	A	A		A	I	F	A	A			I	
	Client communication strategies		F	I	A	A		A	I	F	A	A			I	
GROWTH	Business planning			F	I			A		F			A		I	
	Professional partnerships			F	I			A		F			A		I	
	Marketing strategies			F	I			A		F			A		I	
ADMINISTRATION	Time and task management		F		I			A	I	F					I	A
	Financial management		F		I			A	I	F					I	A
	Systems and Process Management		F		I			A	I	F					I	A
TECHNICAL	ASIC Management												A			

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

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COURSE CODES			
GAI	Graduate Accountant Induction	PTP	Path to Partnership
TPA	The Proactive Accountant	GTD	Getting things done
TPM	The Proactive Manager	CSA	Client service administrator
TCM	The Client Manager	CC	Client Concierge for professional firms
TLM	Team Leader Masterclass	PP	Pricing policies for professional firms
		MA	Marketing administrator
		ASIC	The responsible ASIC registered agent
		UPM	The Ultimate Practice Manager
		RWM	The Responsible Workflow Manager

COURSE COMPETENCIES

			PRACTICE GROWTH				BUSINESS ADVISORY SERVICES				SHORT COURSES			
CATEGORY	Competency	Course	SP1	SP2	IPG	BDM	BCB	BAM	vcFOE	vcFOA	GBC	TRE	PSA	YBF
		CPD Hr	16	16	16	16	16	16	16	16	4	4	4	4
WORKFLOW	Managing scope of work		I	A			F	I	I	A	I		I	I
	Job budgeting and WIP review		I	A			F	I	I	A	I			
	Scheduling and throughput of work		I	A			F	I	I	A	I			
TEAM	Team coaching and supervision		I	A			F							
	Task Delegation and leverage		I	A			F							
	Professional development		I	A			F							
CLIENTS	Understanding client needs		I	A	A	A	F	A	I	A	I	I	I	I
	Client engagement strategies		I	A	A	A	F	A	I	A	I	I	I	I
	Client communication strategies		I	A	A	A		A	I	A	I	I	I	I
GROWTH	Business planning		I	A	A	A								
	Professional partnerships		I	A	A	A								
	Marketing strategies		I	A	A	A	F	F	F	F		I	I	
ADMINISTRATION	Time and task management		I	A			F		F	I				
	Financial management		I	A			F		F	I				
	Systems and Process Management		I	A			F		F	I				
TECHNICAL	ASIC Management													

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SP1	Sole Practitioner Level 1	BCB	Business coaching for bookkeepers	GBC	Good and bad clients
SP2	Sole Practitioner Level 2	BAM	Business analytics for managers	TRE	The referral engine
IPG	Insolvency Practitioner Growth Strategies	vcFOE	Virtual CFO Essentials	PSA	Professional selling
BDM	Business Development Manager	vcFOA	Virtual CFO Advanced	YBF	You've been framed