CPDForAccountants
Self-Paced E-Learning Courses

Path to Manager eLearning Course | Learning Objectives and Assessment tasks

Area	Core Topic	Module	Learning objectives	Assessment tasks
1	Your future as a manager in public practice	The 4Q approach to management - workflow, team, clients and growth	1. Understand the objective of this course and how it relates to your role now and into the future 2. Consider your capabilities and interests in your present and future role as a manager 3. Establish your personal learning program including timelines and feedback process	1. Develop a timetable for the completion of this course. Start with weekly modules, than adjust for any circumstances that may arise along the way. You should expect to complete the course within 4 to 6 months. 2. Use the Merrill-Wilson personality styles and work preferences diagram in slide 19 to assess your personal orientation for task vs people focus. What does this tell you about your motivated abilities? 3. Complete your performance map using the template provided in the support materials. What does this tell you about your strengths? What areas of professional development do you see yourself focusing on in the next few years? 4. Review the SMART action plan template. Identify and document at least 3 SMART actions you will implement from this module. These actions may reflect the results of the performance-mapping task.
2		Uncover your strengths and motivated abilities as manager	1. Critically review your core competencies to determine motivated abilities 2. Discover what happens when work gets busy and stressful 3. Identify your key professional development goals	1. Describe your personality 'style' using the Merrill-Wilson personality profiling tool outlined in slide 21. To what extent can your style assist you in developing a stronger workflow management and client relationship focus? 2. Based on your performance map and your intended professional development path, identify 3 areas of training and coaching focus over the next 12 months.

				Is this consistent with your current PD path? Discuss your thoughts with your manager. 3. Identify key potential roadblocks to your professional development over the next 12 months (with reference to slide 33). What are the solutions to these roadblocks? 4. Review the SMART action plan template. Identify and document at least 3 SMART actions you will implement from this module. These actions may reflect the results of the performance-mapping task.
3	The compliance manager in public practice	Effective use of capacity to leverage compliance workflow	1. Understand the critical importance of leverage in managing compliance workflow and job profit 2. Review your key challenges in effectively managing compliance workflow 3. Confirm the % of your time spent on compliance workflow vs client relationships, team development and business growth	1. Develop your own capacity planner using the outline in slide 14 as an example. Consider (a) where you are now and (b) where you want to be. A sample capacity planner in excel format is available within supporting materials. 2. Identify key challenges to improving your personal efficiency in relation to compliance management, using the examples in slide 17 as a starting point. What can you do to address these challenges? 3. Consider any steps relating to compliance management that could be eliminated by technology or better managed through effective delegation. List these steps and develop some actions to achieve results. 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet (including actions from the previous 2 modules). Check that actions are specific, not general. Establish priorities and timelines if not already done.

4		Key steps to improve compliance productivity and turnaround time	1. Understand what productivity means in relation to compliance workflow. Identify key challenges in relation to personal productivity. 2. Understand what turnaround means in relation to compliance workflow. Identify key challenges in relation to job turnaround time. 3. Put in place steps to improve productivity and turnaround time.	1. Review the productivity targets and results of each team member responsible for compliance workflow? To what extent is individual behaviour influenced by productivity goals? What could you do to increase the focus on the efficiency of production? 2. Explore your compliance team's approach to managing turnaround time. Is this a core focus? What actions should be the core focus to achieve improvements in turnaround time? Focus on identifying key constraints and bottlenecks as outlined in slide 20. 3. Review the key steps involved in effectively managing workflow (slides 25 to 36). What could you do to more effectively manage compliance workflow with your team? 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet (including actions from the previous 3 modules). Check that actions are specific, not general. Establish priorities and timelines if not already done.
5	The advisory manager in public practice	The role and responsibilities of advisory manager	1. Understand the role of 'advisor' as it relates to engagement with clients. 2. Explore your personal strengths and capabilities as an advisor 3. Identify the key steps in reframing your relationship with clients.	1. With reference to slides 9 and 10, identify your current position in the transition from accountant to analyst and advisor. What's a realistic professional development path for you at this time? 2. Using some of the processes and questions outlined in the Discovery Meeting Workbook (supporting materials), develop an outline of your own client discovery conversation. 3. Identify 3 clients you feel you may be able to work with in an advisory capacity. Outline what this means

				and the actions you need to take to reframe the relationship with these clients. 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet (including actions from the previous 3 modules). Check that actions are specific, not general. Establish priorities and timelines if not already done.
6		Keys to transition from compliance to advice as a manager	1. Explore the steps you can take to free up capacity to focus on client relationships 2. Develop your personal client contact program 3. Identify and address roadblocks to taking on a stronger advisory focus	1. Identify the key actions you intend to take over the next year in relation to your advisory focus. Discuss these with your supervisor. Are you both on the same page? If not, review your actions. 2. Using the step-by-step process outlined in the presentation, develop your personal client contact program focusing on 'touch points' Share this with your supervisor. 3. Make a list of the key roadblocks to taking on a stronger advisory focus with your clients. Identify solutions to these roadblocks 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
7	Client management for proactive managers	How to set and manage client service excellence standards	1. Understand the key elements of client service excellence as they apply to professional services 2. Identify key steps in being more proactive in relation to client service 3. Develop your personal client service charter	1. Explore your firm's approach to client service. Does your firm have a service charter or similar document outlining policies and procedures in relation to client service? Is your behaviour consistent with this? 2. Using the example client service charter outlined in this presentation, develop your own charter incorporating at least 5 statements of intent.

				3. Identify at least 3 actions that you can implement now to be more proactive in engaging with clients. 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
8		Management of scope of work and fee for service	1. Understand the key principles of effective scope management for compliance and advisory services 2. Explore the challenges you have in relation to the management of scope of work 3. Identify the key steps involved in setting, getting and managing fee for service	1. Identify 3 clients where scope creep can be an issue. What are the key challenges you face in managing these clients? 2. Discuss with your supervisor the steps that you can take, as a team, to more effectively manage scope of work as jobs proceed 3. Explore the firm's policies and procedures in relation to fee for service as a result of changes in scope of work. What's working well? What could be improved? 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
9	Team management for proactive managers	Evolution from doer to manager and leader of people	1. Identify the key changes we're looking for in our people 2. Describe your natural coaching style and how it impacts on performance management Identify how different coaching styles can be used in specific situations	1. Outline characteristics of different coaching styles. Think of individuals you know that demonstrate each of these styles. How effective are their coaching skills? 2. Identify your natural coaching style. In which situations is this an effective coaching style? In which situations is it ineffective? 3. Identify 3 specific situations in your team that require different coaching styles. Consider how you would provide coaching support in each situation. 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet

10		Keys to drive behavioural change in your team	1. Identify the key reasons why people resist changing behaviour in the workplace. 2. Understand the key principles of active listening and why it's so important for effective coaching. Outline the 9 key questions that effective coaches should ask when driving behavioural change	1. Describe some key principles of active listening and how they would apply to the coaching conversation. 2. Outline De Bono's model of coaching questions for performance improvement. In what situations could this be a useful technique? 3. Identify a real life performance issue where active listening could be helpful in achieving a result. Put together an outline of the interview process, including questions you would ask to facilitate a productive discussion. 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
11	Workflow management for proactive managers	Workflow management essentials for proactive managers	1. Understand the key steps in effectively managing job turnaround and deadlines 2. Outline the key steps required to manage job time cost budgets Identify the key actions to take if workflow gets out of control	1. Explore your firm's approach to job turnaround and deadlines. How does this influence the way that you start and complete jobs? 2. What could you do differently to better manage the time cost budget associated with the jobs you complete? 3. Develop a checklist to monitor the key steps in delivering jobs on time, within budget 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
12		Key principles of effective project	1. Understand the key differences between the management of compliance and advisory projects	1. Outline the process you undertake when commencing client projects that involve ongoing coaching and support. How do you commence these projects?

		management for advisors	2. Develop your personal approach to the engagement of clients in advisory projects 3. Explore key challenges in relation to managing ongoing client projects	What conversations do you have with clients, up front, to prepare them for the project? What could you do differently? 2. Develop a script for introducing clients to the 'J Curve' of change. Use the document provided in support materials. Consider how you will use this as part of the orientation process with clients. 3. Identify at least 3 key challenge you have in effectively managing projects, using the relevant presentation slide as a starting point. What actions can you take to address these challenges? 4. Identify at least 3 SMART actions you will implement as a result of your learnings from this module. Incorporate in your consolidated SMART action spreadsheet
13	Growth and business development for proactive managers	Client discovery and needs analysis techniques for advisors	1. Understand the principles of active listening for proactive managers 2. Explore the use of probing and clarifying questions for rich conversations 3. Start to explore the value of the discovery conversation to really engage your business clients	1. Start to develop your list of open-ended questions that will assist you in exploring client needs. Include examples of probing and clarifying questions. These will be explored further in the next module. 2. Think of a situation where you failed to get a client or prospect 'across the line' with a new project or matter. What could you have done differently in relation to communication and active listening skills? 3. Identify at least 3 opportunities you have in the next month to practice active listening skills. You may consider conversations with colleagues, clients, prospects, family or friends. 4. Identify at least 3 SMART actions you will implement as a result of your learnings from this module.

				Incorporate in your consolidated SMART action spreadsheet
14		Getting clients across the line with advisory services	1. Understand the key principles of presenting a proposal for advisory services based on clearly identified client needs. 2. Identify the key roadblocks and solutions to getting a proposal across the line.	1. Review the key elements of an ongoing advisory service provided to clients. Identify how this service can be packaged as part of an ongoing integrated advisory and compliance service to clients. 2. Develop your own checklist for the development and presentation of a proposal. Be sure to incorporate (a) an initial needs assessment, (b) a 3 option proposal and (c) a formal presentation. 3. Develop a proposal document using the template provided. If you already have a template in use, consider how this can be fine-tuned to create more engagement. 4. Identify at least 3 SMART actions you will implement as a result of your learnings from this module. Incorporate in your consolidated SMART action spreadsheet
15	Measurement and reporting for compliance and advisory managers	Essential KPIs for compliance and advisory managers	1. Explore the range of KPIs that are commonly used by accounting firms in managing staff performance at a compliance and advisory level. 2. Review the ways in which your performance is measured. Identify key challenges and solutions.	1. Document the key performance indicators that are used to measure your performance. Assess the value of these KPIs in relation to compliance and advisory projects. 2. Explore your own performance at a compliance management level. What's working well? What could be improved? Share your thoughts with your supervisor. 3. Explore your own performance at am advisory level. What's working well? What could be improved? Share your thoughts with your supervisor.

				4. Identify at least 3 SMART actions you will implement as a result of your learnings from this module. Incorporate in your consolidated SMART action spreadsheet
16		Develop your own measurement and reporting process	1. Identify key steps to taking personal responsibility for your professional development through KPI measurement and reporting 2. Develop key quantitive objectives for your role as a proactive manager over the next 12 months 3. Explore how you can work with your supervisor to keep your PD plan on track.	1. Review your position description. Assess the extent to which this reflects your role at this point in time. What needs to change? Discuss with your supervisor 2. Review your professional development goals over the next 12 months. What has changed as a result of this course? 3. Review your current performance measurement process. How well does this reflect your professional development goals? 4. Consider how you can have better coaching conversations with your supervisor. Take the lead (if required) in managing these conversations.