CPDForAccountants
Self-Paced E-Learning Courses

PATH TO MANAGER

A practical eLearning course for Senior Accountants and Managers in Public Practice.

16 Modules | 32 CPD Hours

The evolving role of manager in public practice

As accounting firms shift from a primary focus on compliance to integrating both compliance and advisory services, the role of the manager is becoming increasingly crucial. Two distinct types of managers are emerging: one skilled in managing compliance work efficiently and the other driven by a desire to transition towards a stronger advisory role.

In today's professional landscape, managers in accounting firms must develop the ability to look beyond the numbers and provide valuable insights that benefit clients, teams, and the firm. The key to success lies in balancing compliance duties with a strategic, advisory mindset.

What are your strengths as a manager?
What steps do you need to take to advance in your career?

What's this course all about?

This course is designed for senior accountants and managers who oversee workflow and client relationships. It offers a comprehensive guide to understanding both compliance and advisory management roles, helping you assess your strengths and areas for improvement.

By identifying your core strengths and motivated abilities, you'll gain insight into the specific steps required to grow your skills, whether at the compliance level or in an advisory services capacity.

The course will help you align your personal career goals with professional development, ensuring you achieve both personal satisfaction and career advancement.

Each module includes assessment tasks and SMART action planning to guide your journey.

Developed in collaboration with High Tech Soft Touch, consultants with over 25 years of experience working with accounting firms, this course brings together practical insights and proven strategies to help you succeed.

HIGH TECH | SOFT TOUCH

WHAT TYPE OF MANAGER DO YOU WANT TO BE?

In the evolving landscape of public practice, defining the kind of manager you want to become is crucial for your career development. The Path to Manager course is designed to help you make that choice by focusing on two key managerial paths: the Compliance Manager and the Advisory Manager. Both roles are vital to the success of an accounting firm, but each requires different skills and approaches. Understanding your strengths and interests will guide you toward the right path, ensuring a fulfilling and successful career. The course is structured to help you explore the skills you need to develop to take on both roles effectively.

THE COMPLIANCE MANAGER

As a Compliance Manager, your primary role is to ensure that the firm meets its regulatory obligations while maximizing efficiency. You'll be responsible for managing the compliance workflow, ensuring that deadlines are met, and that the team operates at peak productivity. The focus here is on improving compliance productivity, reducing turnaround times, and leveraging available capacity to manage the workload effectively. In this role, you'll also play a key part in implementing technologies that streamline compliance processes and reduce the risk of errors. Your ability to maintain a strong compliance culture within the firm will contribute to its long-term reputation and success.

THE ADVISORY MANAGER

Alternatively, if you are drawn to helping clients grow and thrive, the Advisory Manager path might be for you. Advisory Managers focus on providing strategic advice that goes beyond compliance. You'll work closely with clients to uncover opportunities for business improvement, offering insights into financial strategy, growth, and development. As an Advisory Manager, your ability to develop strong client relationships and deliver tailored solutions will be crucial to fostering trust and driving client loyalty. This role is perfect for those who enjoy thinking creatively and delivering impactful advice that adds measurable value to clients' businesses.

BLENDING BOTH ROLES

The modern accounting firm increasingly values managers who can balance both compliance and advisory roles. This hybrid approach ensures that managers can handle day-to-day compliance while also being proactive in identifying opportunities for client growth and development. If you're interested in both aspects, this course can help you develop a blended skill set to meet these demands. By mastering both the technical and strategic aspects of management, you'll be positioned to provide comprehensive support to your firm and clients, driving both compliance excellence and business growth.

WHO'S THE COURSE FOR?

This course is suitable for senior accountants and managers keen to develop their leadership and management skills in relation to business growth, client relationships, workflow and team management.

For registration details, visit:
cpdforaccountants.com.au/product/path-to-manager

COURSE CONTENT

This course consists of 16 Modules:

Your future as a manager in public practice

1. The 4Q approach to management – workflow, team, clients and growth
2. Uncover your strengths and motivated abilities as manager

Team management for proactive managers

9. Evolution from doer to manager and leader of people
10. Keys to drive behavioural change in your team

The compliance manager in public practice

3. Effective use of capacity to leverage compliance workflow
4. Key steps to improve compliance productivity and turnaround time

Workflow management for proactive managers

11. Workflow management essentials for proactive managers
12. Key principles of effective project management for advisors

The advisory manager in public practice

5. The role and responsibilities of advisory manager
6. Keys to transition from compliance to advice as a manager

Growth and business development for proactive managers

13. Client discovery and needs analysis techniques for advisors
14. Getting clients across the line with advisory services

Client management for proactive managers

7. How to set and manage client service excellence standards
8. Management of scope of work and fee for service

Measurement and reporting for compliance and advisory managers

15. Essential KPIS for compliance and advisory managers
16. Develop your own measurement and reporting process

Each module includes an online presentations and support materials.

All learners have access to content for 12 months from the time they enrol.

CPD – This course is worth 16 CPD Hours

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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 PREVIOUS COURSE LEARNERS

This course has provided such a wealth of information that will be useful for many years to come. I have implemented many workflow and advisory practices mentioned in this course and have seen results for the business and for me individually. I always thought I would prefer the compliance manager role, however this course has provided me with a desire to move into a more advisory focus.

This course is very beneficial, and I would like more of our team members to complete it. One of the most beneficial parts is turning focus to be towards clients as a priority. I believe that this course will be beneficial to align all team members thinking and our goals / strategies as a firm, as well as our approach to various jobs.

The course provides a relevant and practical approach to the steps to take to become proactive mangers in the workplace. This starts with evaluating ourselves to highlight those areas of weakness that we can then look to improve with development. It also provides the procedures to build a team at an accounting practice and the tools to manage and evaluate that team. It also highlights the steps required to offer advisory services and the ways to introduce them to your clients.

This is a great course for those looking to step up and take the next step in their career, This is a fantastic course for Junior managers that might not have had as much management training as well as those looking to accelerate their Advisory career.

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

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