

# COURSE COMPETENCIES

			PD - FROM GRADUATE TO PARTNER						PRACTICE ADMINISTRATION								
CATEGORY	Competency	Course	GAI	TPA	PTM	TCM	TLM	PTP	GTD	CSA	CC	PP	MA	ASIC	ST101	UPM	RWM
		CPD Hr	16	32	32	20	16	32	16	20	16	20	24	18	16	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			
	Share Transactions 101														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
PTM	Path to 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
		ST101	Share Transactions 101
		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	vcFOT	vcFOA	SBEF	GBC	TRE	PSA	YBF	BCA
		CPD Hr	16	16	16	16	16	16	16	16	16	4	4	4	4	4
WORKFLOW	Managing scope of work		I	A			F	I	I	A		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				F
TEAM	Team coaching and supervision		I	A			F									F
	Task Delegation and leverage		I	A			F									F
	Professional development		I	A			F									F
CLIENTS	Understanding client needs		I	A	A	A	F	A	I	A	A	I	I	I	I	F
	Client engagement strategies		I	A	A	A	F	A	I	A	A	I	I	I	I	F
	Client communication strategies		I	A	A	A		A	I	A	A	I	I	I	I	F
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	I		
ADMINISTRATION	Time and task management		I	A			F		F	I	I					
	Financial management		I	A			F		F	I	I					
	Systems and Process Management		I	A			F		F	I	I					
TECHNICAL	ASIC Management															
	Share Transactions 101															

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<b>SP1</b>	Sole Practitioner Level 1	<b>BCB</b>	Business coaching for bookkeepers	<b>GBC</b>	Good and bad clients
<b>SP2</b>	Sole Practitioner Level 2	<b>BAM</b>	Business analytics for managers	<b>TRE</b>	The referral engine
<b>IPG</b>	Insolvency Practitioner Growth Strategies	<b>vcFOT</b>	Virtual CFO Toolkit	<b>PSA</b>	Professional selling
<b>BDM</b>	Business Development Manager	<b>vcFOA</b>	Virtual CFO Advanced	<b>YBF</b>	You've been framed
<b>SBEF</b>	Small Business Equity Financing	<b>BCA</b>	Business Communication for Accountants		