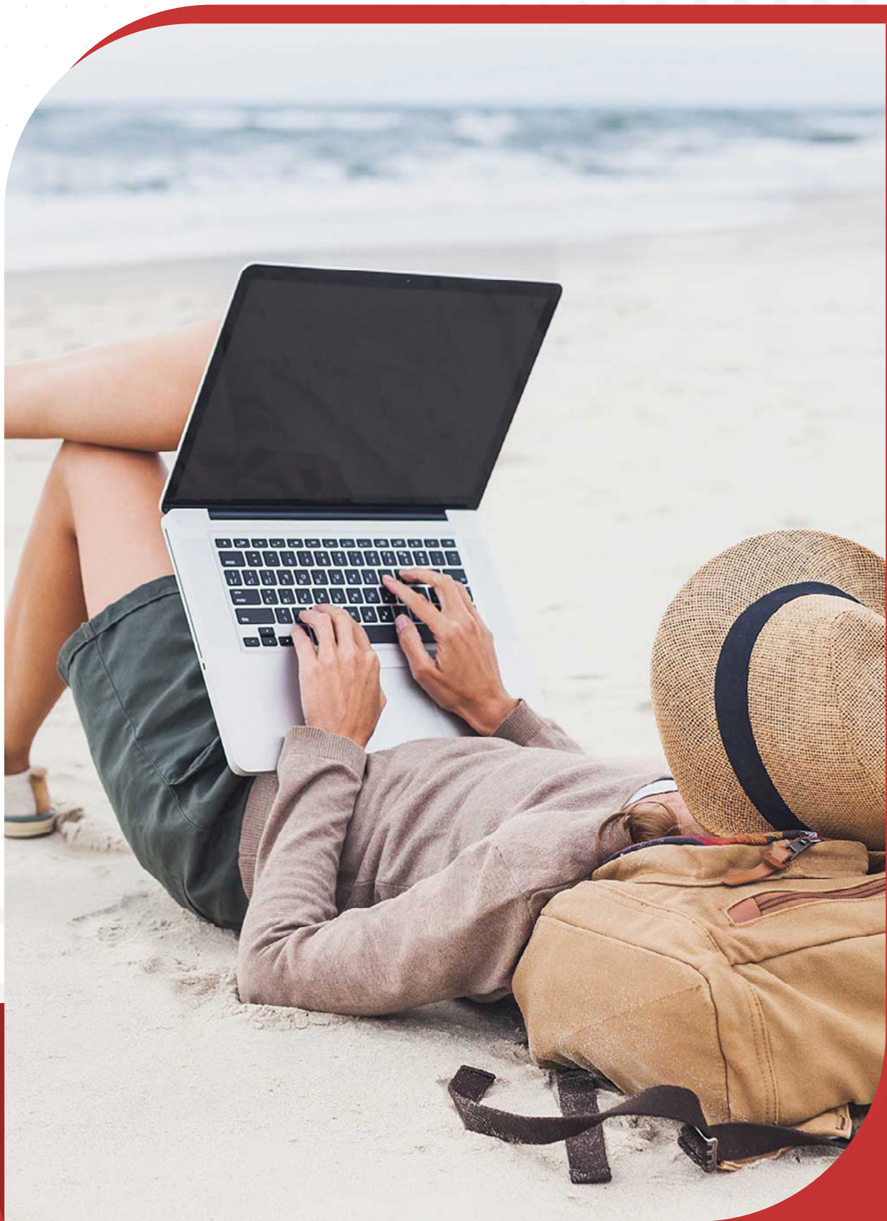
CPDForAccountants
Self-Paced E-Learning Courses

SELF-PACED ELEARNING COURSES FOR ACCOUNTING, BOOKKEEPING AND ADVISORY FIRMS

www.cpdforaccountants.com.au



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LEARN ANYWHERE, ANY TIME

01.

THE E-LEARNING PORTAL

The ‘Digital Revolution’ is leading to significant changes in the way that accounting, bookkeeping and advisory firms manage their work, their people and their clients. We help the leaders and managers of these firms use leading technology and strong communication skills to really engage with their clients and make work a lot more interesting and rewarding for their people.

The CPD For Accountants eLearning platform has been specifically designed to provide people working within accounting, bookkeeping and advisory firms with a step-by-step guide to developing skills necessary to excel in the modern professional service environment.

All content is directly relevant to public practice. Examples and case studies refer to real life situations experienced in a professional service environment. The core presenter utilises over 16 year’s working directly with accounting and financial advisory firms to achieve sustainability and growth.

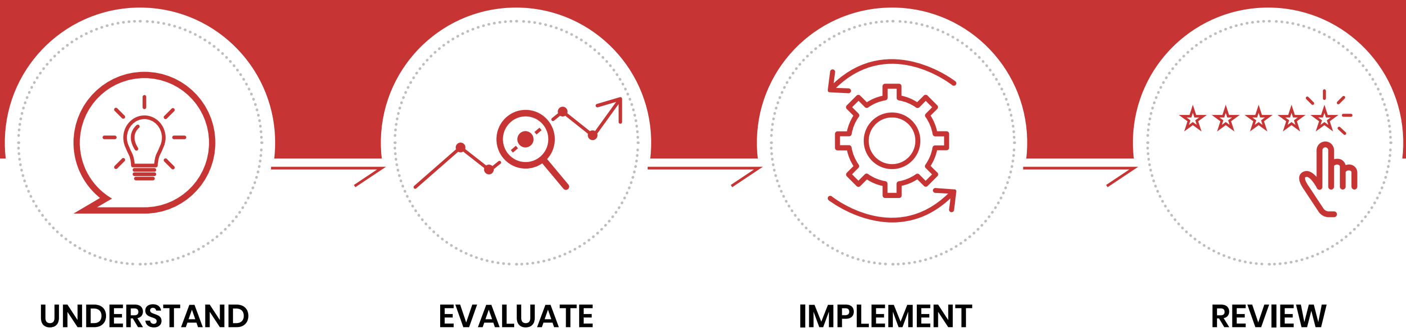
In particular, our courses explore the impact that technology is having on the nature of client relationships and workflow within professional firms. This has had a significant effect on the expectations of staff and clients. Our courses examine the impact of these changes and discuss what firms and their people need to be doing now to build sustainable practices.

KEY FEATURES OF OUR ELEARNING PLATFORM:

1. The portal gives learners access to self-paced learning courses in modular format
2. Learners can complete courses at a place that suits them, within and outside work hours
3. Leaders and managers are able to see at a glance how their staff are progressing
4. Learners have access to course content for up to 12 months following their enrolment
5. All our courses are designed for CPD points with a certificate of completion provided
6. Assessment tasks are generally qualitative, encouraging learners to develop practical actions demonstrating understanding of the concepts
7. Supporting material including workbooks, PowerPoint Slides, templates, scripts and articles are provided within each course

02.

HOW OUR COURSES WORK



Each course is designed to be completed in a sequential manner. A module cannot be started until the previous module has been completed.

Each module contains:

- A pre-recorded presentation (usually between 30 and 45 minutes)
- PowerPoint Slides and Slideshow
- Support material including workbooks, templates, articles
- Assessment tasks

Assessment tasks are generally qualitative in nature and designed to assist learners in applying the concepts discussed during the presentation. All assessment tasks are scored with feedback provided to learners as required.

Learners can complete courses at a location that suits them, within and outside working hours. Generally, learners are expected to complete courses at a rate of 1 module per week. All learners have access to course content for up to 12 months following enrolment.

The structure of all our courses lies within the CPD eligibility criteria outlined by the various Member Associations. Refer to member association guidelines for further details.

All our courses are directly relevant to the accounting profession. All our courses are structured. They have clear, documented learning objectives and assessment tasks that are scored independently. CPD hours are calculated based on the time typically taken to complete each module including viewing presentations, completing workbooks and assessment tasks and developing your SMART action plan for professional development purposes.

A Certificate of Completion will be provided to the learner on successful completion of their course.

Learners should record all their CPD activities to ensure they are completing the requirements of their Member Association.

For further information, visit cpdforaccountants.com.au/cpd-requirements-and-course-eligibility

LEARNING OBJECTIVES AND ASSESSMENT TASKS

All courses and 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.

Example of learning objectives and assessment tasks from *The Proactive Accountant Course:*

FOCUS AREA	MODULE	LEARNING OBJECTIVES	ASSESMENT TASKS
How to take control of personal workflow	What service agreements and scope of work is all about	Understand what scope of work really means in relation to client engagement	Review the service agreement provided. Compare with engagement letters provided to clients by your firm. Wwhat are the differences?
		Identify the key areas of focus in effectively managing personal workflow	How can you more clearly identify client understanding of the service agreement and scope of work?
		Understand how to identify and manage changes in scope of work	Identify 2 recent situations where work was completed that was out of scope. How was this managed? What could have been done differently to get a better result?
			Identify up to 3 SMART actions that you can take in relation to your learnings from this module.
	Keys to delivering work on time, within budget	Understand the key steps in effectively managing job turnaround and deadlines	Explore your firm's approach to job turnaround and deadlines. How does this influence the way that you start and complete jobs?
		Outline the key steps required to manage job time cost budgets	What could you do differently to better manage the time cost budget associated with the jobs you complete?
		Identify the key actions to take if workflow gets out of control	Develop a checklist to monitor the key steps in delivering jobs on time, within budget
			Identify up to 3 SMART actions that you can take in relation to your learnings from this module.
Core actions to effectively engage with clients	Principles of client service excellence for accountants	Understand the principles of client service exellence in accounting firms	Review the firm's approach to client service. Identitify the aspects of the firm's approach that you would regard as "beyond" good service.
		Identify the firm's expectations of you in relationship management	Identify the key touch points between you and clients during the complete of work. What is working well? What could be improved?
		Outline key actions that you can take in your role as a young accountant to engage with clients	Looking forward, what skills do you need to develop to engage better with clients?
			Identify at least 3 SMART actions you will implement as a results of your learnings.

You can view learning objectives and assessment tasks associated with each course by visiting cpdforaccountants.com.au/courses-for-accountants.
Click on the course that interests you, then click on Learning Objectives [Download]

SMART ACTIONS FOR IMPLEMENTATION

The eLearning platform is designed to ensure that learners take practical steps to improve their skills and capabilities. A key component of this goal is the development and ongoing review of a SMART action plan.

Learners are required to identify and complete SMART actions in association with each module. SMART actions are specific, measurable, achievable, realistic and time bound. All actions are documented and included in module assessment tasks.

As the course proceeds, the learner will be required to update each SMART action with progress achieved. Learners are encouraged to share their SMART actions with their manager and to incorporate them in their ongoing professional development program.

As the course finishes, the learners will have a comprehensive action list in place for further implementation and review. They will also be encouraged to make recommendations to their manager in relation to firm systems, procedures and structures.

ACTION	URG	IMP	PRI	CURRENT STATUS/NEXT STEPS
I will think more about my clients future	2	2	4	When completing work for a client I am going to brainstorm on ideas in regards to managing their tax position going forward. These notes should be collated separately in a digital format for all users to see. This brainstorming will be based on the valueadded analytics profile.
Ask clients what their preferred method of communication is	1	2	2	When initially making contact with a new client and with already engaged clients I will ask them what their preferred method of communication is so that we can be more client centric in our approach to client interaction.
Take charge of compliance workflow	2	2	4	Take time to understand the scope of the jobs I am going to complete including budget and WIP before I start the job. Make notes for admin who will pick up the job after me so that they can do the same.
I will complete further research about the clients I work on	2	2	4	Ideally before starting a job I will complete research about the client that I am about to work on. This will be a combination of discussing the client with their manager (if not me), looking into their social media presence and looking at the current news and events in their industry.
I will look for opportunities to communicate with clients beyond workflow	3	3	9	In doing my research I will probably have topics that I can discuss with the clients or questions I can ask them that are specific to their individual situation.
I will communicate more with new clients	3	3	9	I will create a list of open-ended questions that I can use with new clients to get a discussion happening. Questions that delve deeper than ‘how has your day been?’. Ideally the questions won’t lend themselves to a one word answer and will force both of us to talk more.

CAREER NAVIGATOR

"The landscape for business and professional accountants is being reshaped by a host of existing and emerging drivers and trends in business and politics, the economy, science and technology and society's expectations of business. Some of the drivers and trends in these areas affect the entire accountancy profession, some affect specific specialist areas and roles, and the extent of their impact and the expected results may vary widely."

[ACCA Report 'Professional Accountants: The Future']

To add value for their employers and clients, professional accountants of the future will need an optimal and changing combination of professional competencies; a collection of technical knowledge, skills and abilities, combined with interpersonal behaviours and qualities.

Wherever you are on your professional development journey, the Career Navigator will provide guidance on next steps to acquire new skills, explore career opportunities and grow your talent.

The Career Navigator gives you the opportunity to assess your strengths and weaknesses in relation to 6 key areas of professional competence within an accounting or advisory firm environment:

Workflow | Team | Clients | Growth | Administration | Technical

Each area of competency includes 5 statements in relation to skills and knowledge. You are asked to consider these statements in relation to your current and future roles.

By identifying your strengths and weaknesses, you can explore areas of key focus for the future learning. We recommend that you review your capabilities with the Career Navigator on an annual basis.

We will provide recommendations for future courses available through CPD For Accountants. All our courses are eligible for CPD Hours within Australia and New Zealand.

For more information, go to https://cpdforaccountants.com.au/career-navigator

06.

COURSE FEEDBACK AND EXPERT ADVICE

Our eLearning courses all feature the opportunity for learners to give and receive direct feedback as they progress through the course. The feedback may include:

1. Advice on how to successfully complete assessment tasks
2. Feedback on how to apply module learnings to real life situations
3. General feedback in relation to access to the online platform

All Learners have access to the course administrator through the direct email portal within the eLearning platform. Where possible, responses are provided same day and certainly within 24 hours.

As learner complete their course, they are asked for direct feedback on the value they received from the course as well as recommendations for the structure and content of the course. You can read some of the feedback received from learners in the section of this document ***'What our learners say'***. Also visit cpdforaccountants.com.au/course-feedback.

07.

MANAGER ACCESS TO LEARNER STATUS

Our eLearning platform incorporates MANAGER access to course status for each of the firm's learners enrolled in courses. A manager may be the learner's direct manager, the senior partner or principal of the firm or a key administrator such as the firm's training and professional development manager.

Managers have access to learner status anytime, anywhere.

There are three key reports available for managers:

- Course completion
- Course enrolment
- Course status

THE COURSE STATUS REPORT INCORPORATES DETAILED INFORMATION ON THE FOLLOWING AREAS OF FOCUS:

PROGRESS

Click to see which modules have been completed

DUE

The number of assessment tasks required to complete the course

SCORES

Click to see scores of individual assessment tasks

ENROLLED

The date enrolled and the number of days since the last visit

GRADE

Click to see grades on completed assessment tasks

COGWHEEL

Further information on learner activity

Email support@cpdforaccountants.com.au
for further information on how you can set up MANAGER access.

08.

COURSE CATALOGUE

All our courses have been specifically developed for accountants, bookkeepers and financial advisors in public practice. Examples and case studies refer to real life situations experienced in a professional service environment.

The following courses are currently available through our eLearning catalogue. For further information, visit cpdforaccountants.com.au/courses-for-accountants/

NO	COURSE	MODULES	CPD HOURS
1	Virtual CFO Toolkit – How to set up a vCFO service for clients	8	16
2	Virtual CFO Advanced – Guidelines to financial reporting and decision making	8	16
3	Small Business Equity Financing - Unlocking business growth with equity financing	6	16
4	The Business Analyst – A focus on analytics for accountants and managers	8	16
5	Business Analytics for Bookkeepers – A guide to building client relationships	8	16
6	The Proactive Accountant – Take control of workflow and clients	16	32
7	Path to Manager – Essential skills for managers and partners	16	32
8	Path to Partnership – A practical guide to essential skills for managers and partners	16	32
9	Client Manager Essentials – Take control of client relationships	10	20
10	Team Leader Masterclass – Guide to developing exceptional teams	8	16
11	Pricing Policies for Professional Firms – A guide to setting and managing price	10	20
12	Marketing Administrator – Take control of professional services marketing	12	24
13	Client Service Administration – Take control of clients and workflow	10	20
14	Client Concierge – Elevate CS Administration to the Next Level	8	16
15	The Responsible ASIC Registered Agent – Training for ASIC administrators	9	16

NO	COURSE	MODULES	CPD HOURS
16	Share Transactions 101 for ASIC Registered Agents	4	16
17	Getting Things Done – Improve workflow, time and productivity	8	16
18	Graduate Accountant Induction – A step-by-step guide to workflow, clients and teams	8	16
19	The Ultimate Practice Manager – Guide to practice management in accounting and financial advisory firms	8	16
20	Professional Selling for Accountants and Advisors in Public Practice	2	4
21	You've Been Framed – How to refresh and reframe client relationships	2	4
22	Good Clients, Bad Client – How to manage them professionally	2	4
23	The Responsible Workflow Manager – 21st Century Workflow Processes and Tools	8	16
24	Sole Practitioner Level 1 – Practice Management Essentials for Sole Practitioners	8	16
25	Sole Practitioner Level 2 – Advanced Practice Management for Sole Practitioners	8	16
26	Business Development Manager – Growth Strategies for Partners and Managers in Public Practice	8	16
27	Insolvency Practitioner Growth Strategies – Strategies for Growth and Expansion – Liquidators, Administrators and Receivers	8	16

An outline of some of our key courses is presented in following pages. For details of all courses, visit cpdforaccountants.com.au/courses-for-accountants/

COURSE FEEDBACK

These comments reflect the great value that our learners gain from participating in our eLearning courses. For further course reviews, visit cpdforaccountants.com.au/course-feedback/

Thanks so much for this course! The training has given me confidence to take on 1 significant vCFO project that was agreed for $22k. The second vCFO job only started 3-4 weeks ago, we were lucky in that client approached us for this service. However, my study helped me to set the job, explain what was needed and negotiate with client changes of scope. Previously I would have priced this upfront and then tried to sort time overruns later. The fee will be $25K+ annually, so another good win. I feel confident chasing this type of work more and actively speaking to clients about it when we catch up.

Russell Pelusey, Virtual CFO Essentials

The CFO Advanced online course was an excellent add on for my practice. The easy to follow, self-paced, 8 module course was perfect for me as I allocated time each week to complete one module. The presenters made it easy to understand the content and the assessment tasks reinforced the learnings from each module. Action tasks were then documented for further follow up. Overall, an excellent investment in time and hopefully a very good return on investment as vCFO engagements are implemented down the track. I was looking for a course that interested and challenged me and I found it!

Darren Trew, Virtual CFO Advanced

This course has been a great investment. In time I hope to implement everything I learned, but to be honest, implementing just some learned points is a big strive forward for my business. This course will help my clients, which in turn, will help my business. Helping my clients improve their businesses is good business for me. This course has been the best professional development I have done to help my clients in this way.

Tony Meehan, The Business Analyst

I have been doing ASIC work as part of the administration team for an accountancy firm for the last 7 years. I wish this course was around when I first started. I have found this course to be great in relation to confirming procedures that we currently have in place & some that can improve or introduce in the future. I really liked the checklist templates in the various modules, that will help for things like onboarding/exiting client/ de-registrations etc. I would highly recommend this course to our office for any employees who would like a better understanding of how ASIC works or for new employees who would be taking on the ASIC role. Thanks for the great work in putting this course together.

Deborah Walker,
The Responsible ASIC Registered Agent

This course was not only valuable to the administrative team, but helped the whole firm in developing systems and processes to really manage client relationships and workflow in a proactive way. The SMART actions are a great way to convert theory into practice. Thanks for a great course.

Susan Johnson,
Client Service Administration

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 has provided me with the confidence to have in depth discussions with clients and has provided me with the tools to grow and develop both professional and personally. I am blown away by the amount of information provided and am really glad I undertook this course.

Kristy Lloyd, The Proactive Manager

This has been just the thing I need to get myself more organised and actually set up a more streamlined firm. I had tried in the past however a lot was still in my brain which needs to come out and onto paper/computer.

Renee O'Farrell, Getting Things Done

When I first enrolled in this course, I was sceptical, after all what could I learn after already working in public practice for 4 years? I was wrong – this is the most beneficial course I have completed since deciding back in year 12 that I wanted to be an accountant (even more so than my degree or CPA)! It teaches you so many of the basic skills required to operate as efficiently as possible and encourages you to think in new ways and approach difficult situations from a new angle.

Laura Beattie, The Proactive Accountant

Thanks, this has been a really good course. The content on the course has been excellent and it has highlighted some important issues and helped me with communicating and managing my interactions with my clients during this unusual year. Thanks for giving us extra time, this has been valuable. The PowerPoints are great and i have taken many notes and will spend some time taking it all in and focus on the points and areas you have illustrated during the course.

Sarah Littlewood, The Client Manager

Team coaching is one of the most overlooked skills of a manager. This course showed me how I can work with my team members to get jobs completed and invoiced in a timely manner. It's also great for team members to understand that they have responsibility for work delegated.

Sarah Watson, Team Leader Masterclass

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

10.

VIRTUAL CFO TOOLKIT

How to establish and maintain a strong virtual CFO service

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

Virtual CFOs are well placed to help business owners focus on essential, long-term strategic and financial planning. They base their planning and forecasting activities around the business drivers and report performance against these drivers.

The “Virtual CFO Toolkit” is a comprehensive eLearning course designed to empower accounting firms in enhancing their Virtual CFO services for their business clients. This course comprises eight modules, each delving into crucial aspects of virtual CFO service provision, from branding and client engagement to leveraging technology and managing financial workflows.

Aimed at accounting professionals seeking to expand their service offerings and provide strategic financial guidance to their clients, this course offers practical insights, tools, and strategies to excel in the virtual CFO domain.

COURSE CONTENT

- Services Branding, Development, and Delivery
- Team Leverage, Roles, and Responsibilities
- Getting Clients Across the Line with Engagement
- Scope, Fee, and WIP Management
- Workflow and Client Management
- Financial and Management Reporting
- Client Strategic Review and Board Meetings
- Technology/AI and Workflow Solutions

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is ideal for accounting professionals, including partners, managers, and staff members, who are involved in providing or interested in providing Virtual CFO services. It caters to individuals and firms looking to expand their service offerings, increase client value, and stay ahead of industry trends.

Visit cpdforaccountants.com.au/product/vcfo-toolkit/

11.

VIRTUAL CFO ADVANCED

Guidelines to financial reporting and strategic decision making

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

A Virtual CFO is a seasoned accounting professional, providing specialised financial management advice to a portfolio of small/medium businesses rather than just a large one. They proactively manage the present, provide reliable insights about the past as well as plan the future.

This advanced eLearning course is designed to provide a comprehensive guide to financial reporting at a compliance and management level. The course will also provide vCFOs, partners and managers with clear guidelines in relation to client engagement and management strategies.

We'll also review some of the key challenges that vCFOs face in engaging business clients and developing strong ongoing relationships. In addition to general guidelines, the course will take you through a series of case studies that demonstrate how effective financial reporting can deliver great value to business clients.

This course is presented by David Dillon, President of the Virtual CFO Association.

COURSE CONTENT

- The virtual CFO role
- Small business financial management
- Key principles of effective budgeting
- Key principles of financial forecasting
- Management reporting and compliance
- Key principles of cashflow management
- vCFO engagement challenges and solutions
- vCFO implementation challenges and solutions

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for vCFOs, partners and managers who are already involved in providing financial reporting services and want to go to the next level with a high quality of financial advice.

Visit cpdforaccountants.com.au/courses/virtual-cfo-advanced/

12.

SMALL BUSINESS EQUITY FINANCING FOR VCFOS

Unlocking business growth with equity financing

Registration	Per Individual
Number of learning modules	**6**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

Small Business Equity Financing is a comprehensive eLearning course designed to equip Business Advisors and Virtual CFOs with the knowledge and tools to guide their clients through various funding options.

Equity financing involves raising capital through the sale of shares in a company. For small businesses, this means offering a portion of ownership to investors in exchange for funding. Unlike debt financing, which requires regular repayments, equity financing does not burden the company with ongoing financial liabilities. Instead, investors assume a share of the company's profits and losses, aligning their interests with the business's success.

This course emphasizes the critical role of equity financing in supporting small and medium-sized enterprises (SMEs).

COURSE CONTENT

- Private Investment
- Government Grants
- Capital Raising – s708 of the Corporations Act
- Early-Stage Innovation
- Crowd Source Funding and Equity Raising
- Venture Capital

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is ideal for:

- Accountants aiming to provide comprehensive financial guidance to SMEs.
- Business Advisors and Consultants looking to enhance their advisory services.
- Virtual CFOs seeking to expand their expertise in financing options.
- Entrepreneurs wanting to understand funding opportunities for their businesses.

Visit cpdforaccountants.com.au/product/equity-financing/

THE BUSINESS ANALYST

How to turn your accountants into analysts

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

ACCA's recent report on the future of professional accountants identified that 'expert use of analytics will enable better and close to real time reporting, more predictive analysis and greater interconnectedness of financial and non-financial performance'.

CPA Australia's most recent 'Firm of the Future' update recognised that 'accountants need diagnostic skills to interpret financial statements, along with a range of soft skills.' Do you encourage your accountants and managers to look beyond the numbers?

The BUSINESS ANALYST self-paced eLearning course provides an introduction to the world of analytics for accountants and managers in public practice seeking to develop their diagnostic and advisory skills. Over 10 modules, we'll take you on a journey from accountant to analyst and finally to advisor. We'll outline the skills required at each stage of professional development and help you to develop and implement a SMART action plan focusing on your personal interests and capabilities.

COURSE CONTENT

- Business Analyst vs Accountant – What's the difference
- The journey from accountant to analyst and advisor
- Core principles of financial analysis for accountants
- Key financial ratios for business intelligence
- Understand patterns and trends with financial data
- How to identify underlying causes of financial issues
- How to assess and review business performance and potential
- Strategies to engage business clients in future - oriented discussions
- Management reporting and board review
- Deal with business client issues and roadblocks

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for accountants, managers and partners who want to spend more time thinking beyond the numbers and engage their business clients in deeper and broader discussions about their financial future.

Visit
cpdforaccountants.com.au/product/business-analytics-for-managers/

14.

BUSINESS ANALYTICS FOR BOOKKEEPERS

How to provide strategic advice to business clients

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

Bookkeepers provide an essential role for business owners in managing financial accounts on a day to day basis. Today, however, being a Bookkeeper is more than just processing transactions accurately. Working closely with business owners to use this information to evaluate performance and plan is vital. Developing sound business processes, taking advantage of current tools, and having a sound understanding of the current environment is essential.

This course is designed to provide bookkeepers and BAS agents with a step-by-step guide to developing a stronger advisory relationship with their clients. An introduction to the world of analytics can create opportunities to add value by helping clients make the right strategic decisions for their business. Establishing a formal structure around delivery of these services is essential.

We'll outline the skills required at each stage of professional development and help you to develop and implement a SMART action plan for personal and firm growth.

COURSE CONTENT

- The journey from bookkeeper to analyst and advisor
- Core principles of financial analysis for bookkeepers
- Key financial ratios and other metrics
- Understanding patterns and trends in the numbers
- How to check business health and identify underlying causes
- Predictive analytics and cashflow forecasting tools
- Principles of financial reporting and client meetings
- Business analysis tools, systems and procedures
- Effective client engagement and communication strategies

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for bookkeepers and BAS agents who want to develop stronger advisory relationships with their business clients.

Visit
cpdforaccountants.com.au/product/business-coaching-for-bookkeepers/

15.

THE PROACTIVE ACCOUNTANT

Preparing accountants for a future in public practice

Registration	Per Individual
Number of learning modules	**16**
Recommended pace	1 module per week
CPD hours	32
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

The future of public practice accounting is looking quite different to the environment and culture that current managers and leaders of firms experienced when they first came into the industry. Young accountants today are taking on more responsibility for both workflow and client management, allowing more experienced accountants to focus on financial analysis and advice to clients. Accountants need to be strong communicators as well as good analysts.

In this course, we'll show your young accountants how to look beyond the numbers – to develop core skills of effective communication, workflow management, client relationship management, team collaboration and personal time and task management. We will demonstrate how they can show curiosity about numbers and clients to drive innovation in your firm, rather than simply acting as number crunchers. We'll help them to engage with the people around them, become more proactive and take responsibility for their time and their work.

COURSE CONTENT

- How to understand service agreements and scope of work
- Develop and implement your job budgets
- Principles of effective WIP management
- Key workflow issues and solutions
- Develop your personal client service charter
- Keys to effective written communication with clients
- Use active listening to understand client needs
- Beyond the numbers –from analysis to future focus
- What collaboration and team engagement is all about
- How to work effectively with administrative staff
- Keys to managing the relationship with your manager
- Keys to effective team meetings and projects
- How to be really productive (it's not just about time)
- Keys to getting things done in a timely and effective way
- Develop your SMART action list for personal growth
- How to stay on track with your professional development

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for all accountants in public practice.

Visit cpdforaccountants.com.au/courses/the-proactive-accountant/

16.

PATH TO MANAGER

An essential course for compliance and advisory managers

Registration	Per Individual
Number of learning modules	**16**
Recommended pace	1 module per week
CPD hours	32
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

As accounting firms move from a dominant focus on compliance in the work they do with clients to a focus on both compliance and advisory skills, the role of manager has never been more critical. Two types of managers are evolving in public practice, the first with the experience and ability to managing compliance work efficiently and the second with the desire and interest to transition to a stronger advisory focus.

In this course, we'll help your managers to identify their core strengths and professional development pathway. We'll outline the essential steps that effective compliance and advisory managers need to take now and in the future to achieve strong results for your firm. This course is essential for both compliance and advisory managers looking to get to the next level with their capabilities and experience.

WHO SHOULD ENROL?

This course is suitable for managers and partners wishing to specialise in a compliance or advisory role within an accounting firm

COURSE CONTENT

- The 4Q approach to management - workflow, team, clients and growth
- Uncover your strengths and motivated abilities
- Effective use of capacity to leverage workflow
- Key steps to improve compliance productivity and turnaround time
- The role and responsibilities of advisory manager
- Keys to transition from compliance to advice
- How to set and manage client service standards
- Management of scope of work and fee for service
- Evolution from doer to manager and leader of people
- Keys to drive behavioural change in your team
- Workflow management essentials for proactive managers
- Key principles of effective project management
- Client discovery and needs analysis techniques
- Getting clients across the line with advisory services
- Essential KPIS for compliance and advisory managers
- Develop your measurement and reporting process

A list of module objectives and assessment tasks is available on request.

Visit cpdforaccountants.com.au/product/path-to-manager/

PATH TO PARTNERSHIP

A practical guide to essential skills for managers and partners

Registration	Per Individual
Number of learning modules	**16**
Recommended pace	1 module per week
CPD hours	32
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

This self-paced eLearning course outlines in a practical way the key leadership and management skills that managers and partners need to develop in order to achieve and exceed their performance goals.

This course begins by asking key questions about the learner's current strengths in relation to workflow, team, clients and business growth. Your performance map will then provide a guide to the areas you need to focus on to achieve your potential as a manager or partner. Along the way, you will use your personal SMART action plan to map your development path.

The course consists of 4 stand-alone parts focusing on workflow, clients, team and growth. You can register for the course or each part individually.

WHO SHOULD ENROL?

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

COURSE CONTENT

- Seven keys to improve your personal and team workflow management processes
- Task and project management skills for leaders in public practice
- How to maximise recoverability through project and WIP management
- How to effectively utilise the hours in your busy day
- How to develop your personal leadership style
- Nine key steps to effective team coaching
- How to create capacity through effective leverage
- Key steps to manage your team members through training, coaching and review
- Client discovery and effective needs analysis techniques
- Effective internal and external referral strategies for growth
- Keys to getting existing clients across the line
- How to establish your personal business development plan
- Management of client scope and fee for service
- Communication strategies to engage with clients
- How to manage challenging clients and difficult situations
- How to ensure you're remaining relevant to your clients

A list of module objectives and assessment tasks is available on request.

Visit cpdforaccountants.com.au/courses/path-to-partnership/

CLIENT MANAGER ESSENTIALS

Take control of client relationships

Registration	Per Individual
Number of learning modules	**10**
Recommended pace	1 module per week
CPD hours	20
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

As accounting firms transition from a focus on compliance services to a more strategic approach in helping clients to achieve their financial goals, there's a strong need for accountants, managers and partners to be more proactive in managing client relationships. The challenge is that in most firms, most of the workflow is still compliance driven. This fosters a production line mentality where the focus is on outputs rather than engagement.

The Client Manager Course focuses on the key steps required for accountants, managers and partners to take control of client relationships at a personal level. We'll discuss how technology is allowing individuals and firms to streamline compliance and open up opportunities to add value through stronger ongoing client relationships.

WHO SHOULD ENROL?

This self-paced eLearning course is suitable for accountants, managers and partners who really want to take control of client relationships at a personal level. All 10 modules have clear learning objectives and assessment tasks. All learners will be required to develop their personal SMART action plan to drive client relationships at a level appropriate to their capabilities and responsibilities.

COURSE CONTENT

- The New Age Client Service Manager
- Your personal client service standards – Develop your own client service excellence program
- Establishing scope of work and fee – Establish clear engagement with service agreements
- Management of client expectations – Ongoing management of scope and fee for service
- Management of client workflow – How to manage workflow at a compliance and advisory level
- Client communication strategies – Communication tools to engage consistently with clients
- Dealing with difficult clients – How to manage challenging clients and difficult situations
- Reframing client relationships – Key steps to introduce new services to existing clients
- Client feedback and review processes – Ensure that you're remaining relevant to your clients
- Projects to really engage with clients – Practical actions to develop client relationships

A list of module objectives and assessment tasks is available on request.

Visit cpdforaccountants.com.au/courses/client-manager/

TEAM LEADER MASTERCLASS

A step by step guide to developing exceptional teams

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

This eLearning course is designed to provide new and experienced team leaders with a framework to improving their leadership and coaching skills to achieve better results for their people, their team and the business in which they work.

Over 8 modules, we'll discuss some of the key challenges that today's team leaders in accounting and advisory firms are facing in successfully managing their people. Practical strategies will be identified.

The course will provide supervisors, managers and partners with a clear framework to develop their skills as effective team leaders.

All participants will develop a formal SMART plan of action focusing on personal and team actions to achieve their goals.

COURSE CONTENT

- What type of team leader do you want to be?
- Nine key steps to effective team coaching for leaders
- How to develop a strong team culture for results
- Implement your team's training and PD plan
- 21st Century approach to performance management
- Keys to working effectively with remote staff
- How to delegate, leverage to create capacity
- Self-motivation and how to deal with burnout

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for supervisors, managers and partners who are keen to improve the way that they lead and manage their teams. Both new and experienced team leaders will benefit from the course.

Visit cpdforaccountants.com.au/courses/team-leader/

20.

CLIENT SERVICE ADMINISTRATION

Take control of clients and workflow

Registration	Per Individual
Number of learning modules	**10**
Recommended pace	1 module per week
CPD hours	20
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

The modern accounting and advisory practice requires a high level of administrative support to free up the capacity and expertise of specialist advisors. The Client Service Administrator is an essential role that is evolving in almost every progressive professional firm. This person uses both technology and soft skills to provide an essential link between clients and the firm's technical staff. In addition, CSA's add valuable support to the firm in relation to financial management, people management, systems development and marketing activities.

This course is designed to help the administrative team of accounting and advisory firms take control of workflow and clients at an administrative level. The course has 5 key areas of focus – (1) Administrative roles and responsibilities, (2) Client relationship management, (3) Workflow management, (4) Teamwork and collaboration and (5) Special CSA Projects including marketing and lock-up (WIP and debtor) management.

COURSE CONTENT

- CSA team structure and responsibilities
- Getting engagement and support internally
- Establishing client service excellence standards
- Client engagement and communication strategies
- Scheduling and throughput of client work
- Creating effective workflow reporting systems
- Working together as an administrative team
- Working effectively with the technical team
- Client profiling and marketing strategies
- Proactive management of WIP and debtors

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for practice administrators keen to improve the way they manage workflow and clients. Administrators are encouraged to involve their team in this course, to look more deeply at their own role and responsibilities within the firm.

Visit cpdforaccountants.com.au/courses/csa/

CLIENT CONCIERGE

Elevating Client Service Administration to the Next Level

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentations • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on learner progress

COURSE OUTLINE

Most accounting and advisory firm claim that they service their clients well. However, client engagement is still to a large extent reactive with communication based on production requirements rather than a need or desire to engage in proactive and collaborative communication.

This course challenges the way your firm manages its clients. It looks at engagement AND communication to provide a framework for client management in the 21st Century.

By enrolling in this course, you will:

- Learn the essential skills needed to succeed in a Client Concierge role
- Understand the impact of digital disruption and AI on the client service industry
- Develop strategies for effective client onboarding and engagement
- Learn how to manage client relationships effectively
- Develop skills to reach out to clients and boost your marketing efforts
- Create a top-notch client service charter and elevate your client service administration to the next level

COURSE CONTENT

- Introduction to Client Concierge
- Client Onboarding and Engagement
- Client Relationship Management
- Client Feedback and Review Procedures
- Client Connections and Marketing
- CRM Business Systems and Processes
- Developing a Client Service Charter
- Putting it All Together

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

Both new and experienced administrators and their teams will benefit from the opportunity to critically review their firm's approach to client relationship management. This course is also suitable for principals, directors, partners and managers involved in the managing client relationships

Visit cpdforaccountants.com.au/product/client-concierge/

THE RESPONSIBLE ASIC REGISTERED AGENT

Registration	Per Individual
Number of learning modules	**9**
Recommended pace	As required
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

Many registered agents don't fully understand their obligations or the consequences of non-compliance for themselves as an agent and for their clients. This course focuses on providing agents with a detailed understanding of their obligations, ASIC lodgement requirements, with a particular focus on supporting minutes and related governance documents. This is a unique course aimed to equip ASIC registered agents with the skills and resources required to provide high quality corporate secretarial services to their clients and navigate ASIC lodgements.

The course is presented by ASIC registered agent specialist Viola Pythas, the founder of **CorpSec Services.**

COURSE CONTENT

- ASIC Registered Agent's Obligations
- ASIC Registered Agent Portal, ASIC Connect & Useful ASIC Pages
- Types of Companies and Key Considerations When Registering Companies
- Maintaining Corporate Registers, Onboarding New Clients and Exiting Lost Clients
- Annual Returns and Annual Financial Reporting Requirements
- Company Changes
- A Detailed Look at Minutes
- Deregistrations and Reinstatements
- Modernising Business Register (MBR) Program and Director ID Number

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for:

- ASIC registered agents who would like to better understand their role and responsibilities and refresh their knowledge of the ASIC Registered Agent Terms and Conditions
- Accountants, bookkeepers and employees of accounting firms wanting further training on governance processes to be better equipped to handle their clients' compliance work and ASIC lodgements.
- Corporate secretarial officers, company compliance officers and managers.
- Anyone wanting to deepen their understand of the rules and regulations around company compliance.
- Agents preparing minutes and governance documents to support company changes.
- Agents wanting to learn tips and tricks from an experienced practicing registered agent and governance professional.

Visit cpdforaccountants.com.au/courses/asic/

23.

SHARE TRANSACTIONS 101 FOR ASIC REGISTERED AGENTS

Registration	Per Individual
Number of learning modules	**4**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	6 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

This course provides a comprehensive guide to understanding and managing share transactions for ASIC registered agents and ASIC administrators. The presenters discuss the intricacies of processing different types of share transactions with ASIC, the supporting documents required and most importantly the underlying provisions of the Corporations Act 2001 (Cth) that underpin the share transactions.

COURSE CONTENT

- Types of Share Transactions and Share Classes
- Beneficial Ownership and Register of Members
- Division or Conversions of Shares
- Consolidation or Subdivision of Shares
- Capital Reductions and Share Buy-backs
- Redeemable Preference Shares / Forfeited Shares
- Correcting Share Capital Errors
- Withdrawing ASIC Forms and Case Studies

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for:

- ASIC registered agents who would like to better understand the complexities of share transactions, the requirements and the process to undertake them.
- Accountants, bookkeepers and employees of accounting firms wanting further training on share transactions to be better equipped to handle their clients' compliance work, the associated steps and ASIC lodgements.
- Corporate secretarial officers, company compliance officers and managers.
- Agents keen to consolidate and refresh their knowledge of the more complex share transactions.
- Agents preparing minutes and governance documents to support share capital changes.
- Agents wanting to learn tips and tricks from experienced a practicing registered agent and governance professionals and avoid ASIC requisitions.

Visit cpdforaccountants.com.au/product/share-transactions-101/

24.

GETTING THINGS DONE

Improve workflow, time and productivity

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	As required
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on registrant progress

COURSE OUTLINE

Technology including cloud accounting, bankfeeds and other automated processing systems have changed the way that accounting firms manage their work and their clients. In recent years, we've seen a significant improvement in the efficiency of workflow associated with compliance and administrative matters.

However, most accountants, managers and partners in public practice still struggle to find time to think ahead and be proactive with workflow and clients. This limits opportunity to add value through additional services including business and financial advice.

The Getting Things Done self-paced eLearning course provides a step-by-step guide to improving workflow, time management and productivity for accountants, supervisors, managers and partners in public practice.

COURSE CONTENT

- How to effectively utilise the hours in your day
- Keys to improve your workflow processes
- Effective leverage and delegation techniques
- Maximise recoverability through WIP management
- How to set and achieve goals through SMART actions
- Project management skills for accounting professionals
- Technology tips and techniques to get things done
- Proactive management of client relationships

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for any accountant, supervisor, manager or partner in public practice who wants to develop their workflow and time management skills.

Whether you're new to the public practice environment or experienced and wanting some fine-tuning with the way you manage your day, this course will add value and provide a pathway to success.

Visit cpdforaccountants.com.au/courses/getting-things-done/

GRADUATE ACCOUNTANT INDUCTION

A step-by-step guide to workflow, clients and teams

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on learner progress

COURSE OUTLINE

The proactive accountant takes on responsibility for job budgets and workflow. They strive for stronger engagement with clients. They collaborate with colleagues and know how to work closely with their manager to achieve targets. Finally, they take control of their time and adopt a proactive approach to professional development.

The Graduate Accountant Induction eLearning course is designed to provide new accountants and trainees with a practical understanding of public practice and their role in completing workflow in a timely and accurate manner.

We'll show your young accountants how to really take control of their time, their clients and their workflow . We'll help them to develop core skills of effective communication, workflow management, client relationship management, team collaboration and personal time management.

COURSE CONTENT

- How to take control of accounting workflow - *Keys to understanding accounting workflow including following a job budget and timeline.*
- How to effectively engage with firm's clients - *The role of accountants, managers and partners in communicating with clients effectively*
- How to work collaboratively with colleagues - *Key steps to working with colleagues, managers and administrators in accounting firms.*
- How to take control of projects, tasks and activities - *Essential principles of time and task management in an accounting firm.*

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for interns and graduate accountants working in a public practice environment. Any undergraduate or graduate accountant with up to 18 month's experience in public practice will benefit from this course.

Visit cpdforaccountants.com.au/product/graduate-induction/

THE ULTIMATE PRACTICE MANAGER

Guide to practice management in accounting and financial advisory firms

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentation • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on learner progress

COURSE OUTLINE

The accounting and financial advisory industry is changing rapidly. Is your firm in a strong position to take advantage of opportunities and deal effectively with challenges? This course is designed to provide practice managers including administrators and operations managers with the opportunity to critically review firm health at an operational and strategic level.

This course will help you to:

- Challenge your current approach to practice management
- Explore industry best practice in relation to technology
- Plan effectively for the future growth and profit of your firm
- Engage key stakeholders in your firm in strategic planning
- Develop your personal practice management plan

COURSE CONTENT

- The business of practice management
- Workflow management
- Client management
- Team development
- Business development
- Financial management
- Business planning strategies
- Corporate Governance

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

Both new and experienced practice and operations managers will benefit from the opportunity to critically review firm health at an operational and strategic level. This course is also suitable for principals, directors and partners directly involved in strategic planning and operational management.

Visit cpdforaccountants.com.au/product/practice-manager/

THE RESPONSIBLE WORKFLOW MANAGER

Transform your Practice with 21st Century Workflow Processes and Tools

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentations • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on learner progress

COURSE OUTLINE

An accounting or advisory firm can always benefit from improved workflows and processes. But to improve workflow management, it's imperative to examine the base processes that make up the workflow.

Usually, these processes have been randomly and unevenly applied throughout the years, meeting needs as they happen. In most cases, a business practice may have come about due to convenience in the moment rather than a formal attempt to improve the accuracy and efficiency of work.

This course challenges the way your firm currently manages its workflow. It looks at clients, people, systems, processes and technology to provide a framework for workflow management in the 21st Century.

COURSE CONTENT

- Understand the role and responsibilities of Workflow Manager
- Explore common workflow management issues and challenges
- Complete your firm's Workflow Management Audit
- Who's responsible for what - Assigning work and spheres of influence
- Develop work-in, Job budgeting, review and work-out procedures
- Manage the scheduling and through-put of work
- Implement workflow tracking, KPI reports and production meetings
- Focus on client engagement, on-boarding and communication
- Deal effectively with resource and capacity issues
- Identify all software tools for workflow management
- Implement digitisation of workpapers and processes
- Deal with resistance to change with workflow processes

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

Both new and experienced workflow and practice managers will benefit from the opportunity to critically review their firm's approach to workflow management. This course is also suitable for principals, directors, partners and managers involved in the management of workflow in your firm.

Visit cpdforaccountants.com.au/product/workflow-manager/

THE SOLE PRACTITIONER – LEVEL 1

Practice Management Essentials for Sole Practitioners

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentations • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on learner progress

COURSE OUTLINE

New sole practitioners in accounting grapple with challenges like establishing their business, workflow management and client acquisition in a competitive market. They must manage finances carefully, balancing costs with client-based revenue, and constantly update their knowledge of changing accounting and tax laws. The workload, encompassing both client service and administrative duties, can be overwhelming, often affecting work-life balance.

This course is designed to provide practice managers including administrators and operations managers with the opportunity to critically review firm health at an operational and strategic level. Through this course, you will develop a SMART action plan focusing on specific areas for business development and growth.

COURSE CONTENT

- Identify key challenges and solutions for sole practitioners
- Define firm services and create ideal client profiles
- Strategies for finding and retaining the right clients
- Get prospects and client over the line with services
- Determine the scope of work and setting fees
- Enhance client relationship management
- Streamline workflow management and reporting
- Identify software solutions to enhance efficiency
- Understand the role of capacity and leverage in practice growth
- Set up a team structure that works for you and your firm
- Establish key performance indicators (KPIs) for the firm
- Manage work in progress (WIP) and debtor control

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for new Sole Practitioners, transitioning professionals (accountants and managers moving from employment in a firm to establishing their own practice) and Practice Managers (administrators who manager a practice and would like to adopt a more formal approach to internal systems and procedures.

Visit cpdforaccountants.com.au/product/sole-practitioner-essentials/

THE SOLE PRACTITIONER – LEVEL 2

Advanced Practice Management for Sole Practitioners

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentations • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on learner progress

COURSE OUTLINE

Established sole practitioners aiming to grow their firms face challenges like enhancing workflow management, meeting elevated client expectations, managing staff effectively, and maintaining robust cash flow. Additionally, they need innovative strategies for attracting new clients. This growth phase requires a strategic shift from solo operations to a broader, dynamic business model.

The Advanced Sole Practitioner eLearning course covers complex aspects of managing a growing practice with staff support.

In this course, learners will dive into sophisticated strategies for workflow management, client relationship management, business expansion, advanced financial management and leadership skills required to steer your firm towards greater success.

COURSE CONTENT

- Scaling business operations for future growth
- Advanced client acquisition and retention techniques
- Leveraging professional networks for business development
- Identifying new market opportunities for services
- Diversifying accounting services and revenue streams
- Keys to managing a diverse client portfolio
- Customizing services for more complex client needs
- Advanced workflow design and optimisation
- Leadership principles for accounting professionals
- Managing team dynamics and motivation
- Strategic financial decision-making for firm growth
- Key actions to improve WIP and debtor days

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is suitable for experienced Sole Practitioners, Practice Managers and Senior Accounting Professionals: Seasoned accountants who have a substantial client base and are looking to expand their services, staff, and market reach.

Visit cpdforaccountants.com.au/product/sole-practitioner-advanced/

30.

BUSINESS DEVELOPMENT MANAGER

Growth Strategies for Partners and Managers in Public Practice

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentations • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on learner progress

COURSE OUTLINE

A focus on fee growth can be one of the most challenging skills to master, especially when the focus in early years of PD has been on the acquisition of technical skills and competence in managing workflow.

For partners and managers aspiring to partnership, demonstration of business growth skills is an essential part of adding value to clients and to the firm.

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 CONTENT

- Building strong client relationships
- Identifying and Attracting New Clients
- Online Marketing Initiatives for Accounting Firms
- Leveraging Technology for Client Engagement
- Client Retention and Loyalty Strategies
- Key Performance Indicators (KPIs) for Business Growth
- Financial Reporting and Performance Analysis
- Business Development and Scaling Strategies

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

This course is designed for principals, directors, partners and managers who want to contribute to business growth with existing and new clients.

Visit cpdforaccountants.com.au/product/bdm/

31.

INSOLVENCY PRACTITIONER – GROWTH STRATEGIES

Strategies for Growth and Expansion – Liquidators, Administrators and Receivers

Registration	Per Individual
Number of learning modules	**8**
Recommended pace	1 module per week
CPD hours	16
Content	• Recorded presentations • PowerPoint slideshow • Assessment tasks and quizzes • Support Resources
Availability	12 months following enrolment
Reporting	• Learner access to course status • Manager access to reports on learner progress

COURSE OUTLINE

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?

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

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

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

COURSE CONTENT

- Identifying and Attracting New Clients
- Building Strong Client Relationships
- Online Marketing Initiatives for Insolvency Firms
- Leveraging Technology for Client Engagement
- Client Retention and Loyalty Strategies
- Key Performance Indicators (KPIs) for Business Growth
- Financial Reporting and Client Communication
- Business Development and Scaling Strategies

A list of module objectives and assessment tasks is available on request.

WHO SHOULD ENROL?

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.

Visit cpdforaccountants.com.au/product/insolvency-growth/

32.

FEES AND REGISTRATIONS

Visit https://cpdforaccountants.com.au/courses/ for further information on the fee structure for each course.

Note that some course registration fees are 'per firm' and others are 'per individual'.

You can register directly through the online shop at https://cpdforaccountants.com.au/courses/

For further details, contact us directly.

FURTHER INFORMATION ON OUR ELEARNING COURSES

Course brochures are available online, simply go to www.cpdforaccountants.com.au and click on the course outline. Alternatively you can email us directly for a brochure or a list of the course learning objectives and assessment tasks.

If you would like further information on how our eLearning courses can help you develop the skills and capabilities of your people, contact us directly:

Ph: [AUS] 1300 133 848

Email: support@cpdforaccountants.com.au

Mail: PO Box 481 Lindfield NSW 2070

Web: www.cpdforaccountants.com.au

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