HIGH TECH | SOFT TOUCH
Developing strong, sustainable accounting and advisory firms

CLIENT CONNECT

YOUR FIRM'S INTEGRATED CLIENT MANAGEMENT PROGRAM

12 PART PROGRAM FOR YOUR FIRM

A new 12-part SELF PACED ONLINE PROGRAM for Accounting and Advisory Firms

Client management is no longer just the responsibility of client managers and partners. Everyone in the firm involved with client work should take personal responsibility for the role they play in managing client expectations and delivery of services.

For firms transitioning from an annual compliance service to an ongoing advisory service with business and personal clients, it's never been more important to establish clear expectations of client service excellence.

The new financial year is the perfect opportunity to review the way your firm and its people engages with its clients.

HTST has developed a 12 part online learning program to help accounting / advisory firms and their staff put in place a formal process for managing client relationships in a proactive way. This program is supplemented by a 4 part online program for individuals involved in client management.

We'll provide specific step by step guidelines for accounting and advisory firms to develop their client care program, including development of a client service charter and management of client expectations through engagement and ongoing communication.

We'll also provide guidelines for individual accounting and administrative staff to help them take responsibility for client relationship management at a personal level.

This program is available anytime, anywhere for your accountants through our eLearning portal. Visit https://hightechsofttouch.matrixlms.com

WHO'S IT FOR?

This course is suitable for any accounting or advisory firm looking for its people to take a more proactive role in the management of client relationships.

Read on to find out more...

CLIENT CONNECT CONSISTS OF 2 LINKED ONLINE PROGRAMS

CLIENT CONNECT FIRM PROJECT

FOCUS ON THE FIRM AND TEAM

Over 12 online modules, we'll provide the structure to help your firm and team develop a clear and consistent approach to client service, supported by systems, processes and behavioural guidelines. All core areas of client focus will be discussed.

CLIENT CONNECT PERSONAL PLAN

FOCUS ON THE INDIVIDUAL

Over 4 online modules, we'll provide a structured approach to align individual and firm actions and behaviours in relation to client service. Your staff will identify ways they can take personal responsibility for client care.

This program is suitable for administrators, accountants and advisors working in a professional service environment.

PROGRAM FEE

CLIENT CONNECT FIRM PROJECT $AU720 + GST PER FIRM

CLIENT CONNECT PERSONAL PLAN $AU200 + GST PER REGISTRANT

Visit **http://www.hightechsofttouch.com.au/product/client-connect** to register, or email **dale.crosby@hightechsofttouch.com.au**

NOW AVAILABLE ON HTST'S ELEARNING PORTAL!

- HTST's eLearning portal gives administrators, accountants and advisors in public practice online access to self-paced learning courses in modular format. Visit https://hightechsofttouch.matrixlms.com
- Managers and leaders can now enrol their staff in our specialist online courses at any time of the year. There's no need to wait for the next available course.
- This means that your staff can complete learning courses at a time and place that suits them, both in and outside working hours.
- You'll be able to see at a glance how your staff are progressing through their courses.
- The self-paced courses will be supplemented by live online forums from time to time.
- Registrants have the opportunity to access online group forums within each course to share ideas and thoughts with other registrants.

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CLIENT CONNECT

YOUR FIRM'S INTEGRATED CLIENT MANAGEMENT PROGRAM

PROGRAM CONTENT

CLIENT CONNECT FIRM PROJECT

$AU720 + GST PER FIRM

Step by step guides will be provided in relation to client relationship management in the following 12 areas of core focus:

1. Develop your firm's client care program
2. Team engagement and collaboration
3. Client service charter and behavioural guidelines
4. Client communication standards
5. Client engagement and re-engagement
6. Fee management – scoping, invoicing and payment
7. Client expectations and workflow management
8. Develop service levels based on client profiles
9. Client health check and needs analysis
10. Structure of client interviews and meetings
11. Dealing with client roadblocks and complaints
12. Client feedback and review processes

CLIENT CONNECT PERSONAL PLAN

$AU200 + GST PER REGISTRANT

Step by step guides will be provided in relation to client relationship management in the following 4 areas of core focus:

1. Client communication
2. Workflow management
3. Business development
4. Team collaboration

SUPPORTING MATERIAL

CLIENT CONNECT FIRM PROJECT

- 12 Instructional presentations
- PowerPoint notes and slideshow
- Structured implementation plan (team)
- Supporting documents and templates

CLIENT CONNECT PERSONAL PLAN

- 4 Instructional presentations
- PowerPoint notes and slideshow
- Assessment tasks
- SMART action planning process

OTHER COURSES

Visit **https://hightechsofttouch.matrixlms.com/** for details of all our self-paced eLearning courses, including:

1. **The Young Accountant** – Looking to the future of accounting
2. **The Proactive Manager** – Essential course for compliance and advisory managers
3. **Team Coaching for Managers** – Structured approach to developing coaching skills
4. **Beyond The Numbers** – Make the transition from accountant to analyst
5. **The Proactive Business Coach** – Principles of effective business coaching
6. **Build Your Fee Base** – A guide to fee growth for managers and partners
7. **Client Connect** – Your firm's integrated client management course
8. **Pricing Policies for Professional Firms** – Set, get and manage fee for service
9. **Client Services Administrator** – Taking control of clients and workflow for admin teams
10. **Marketing Administrator** – A Guide for Accounting and Advisory Firms