

# THE PROACTIVE BUSINESS COACH

HOW TO COACH YOUR BUSINESS CLIENTS TO SUCCESS



## ENGAGE IN COACHING YOUR BUSINESS CLIENTS IN 2018

A new 10-part SELF PACED ONLINE COURSE for client managers and partners in public practice.

As experienced business professionals, you have access to lots of resources and a proven set of systems and tools that gives clients the information they need to grow their business.

However, for accountants to really succeed in the advisory world, they need to do more than provide information. They need to assist and guide their business clients in the implementation process.

In this course, we'll take you through a step by step process to really engage with business clients in an ongoing advisory and coaching process.

We'll show you how to use technology and soft skills together in a way that adds value well beyond traditional accounting and tax work.

HTST has developed a 10 part eLearning course to help managers and partners develop the key skills required to effectively coach business clients.

This course uses proven skills and tools used by successful business coaches and consultants to attract new business and provide ongoing support with recurring fees.

We'll show your managers and partners how they can use active listening skills to open up conversations and identify what's really important to their clients.

We'll outline the key processes involved in getting clients across the line with ongoing coaching services designed to help clients achieve their potential in business.

And, most importantly, we'll demonstrate how to keep coaching clients engaged, month after month and year after year, with a level of support that they value.

**This program is available anytime, anywhere for your accountants through our eLearning portal. Visit <http://hightechsofttouch.com.au/product/business-coach/>**

## WHO'S IT FOR?

This online course is suited to client managers, partners and principals of accounting and advisory firms.

**Read on to find out more...**

# COURSE OUTCOMES

This course provides client managers, partners and principals directly responsible for client relationships with a clear understanding of the principles of effective business coaching to deliver results. The course highlights the importance of using coaching to 'teach clients to fish' rather than have the solutions for all the client's business issues and challenges. Participants are encouraged to consider their own coaching style in relation to specific situations and challenges.

Within all modules, assessment tasks will be provided and SMART actions will be identified to provide a road map for professional development as a business coach.

## COURSE STRUCTURE

- This is a self-paced online course consisting of 10 individual learning modules.
- All modules incorporate a 4 stage learning process: Understand, Evaluate, Implement and Review
- The course is designed to be completed over 10 weeks, however it can be completed at a pace that suits each registrant.
- Each registrant will have a dedicated login to give them personal access to the online course.
- Each module incorporates a 45 minute recorded presentation and support material.
- An online assessment is required for successful completion of each module.
- The registrant's manager will be able to review progress and provide feedback at all times.
- Each registrant will have access to an online forum for feedback and discussion.
- This course is eligible for 20 CPD hours, subject to confirmed completion of all modules. Registrants will have access to the course content for 12 months to review progress.

**COURSE FEE: AU\$600+ GST** PER REGISTRANT (JUST AU\$30 PER CPD HOUR)

Visit [www.hightechsofttouch.com.au/product/business-coach/](http://www.hightechsofttouch.com.au/product/business-coach/) to register, or email [dale.crosby@hightechsofttouch.com.au](mailto:dale.crosby@hightechsofttouch.com.au)

## NOW AVAILABLE ON HTST'S ELEARNING PORTAL!

- HTST's eLearning portal gives accountants 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.
- Also, 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.

# THE PROACTIVE BUSINESS COACH

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## PROGRAM CONTENT

- 1 DATA ANALYSIS - Interpret financial data to add value to business clients**  
Understand the principles of financial analysis for business coaches  
Assess business performance and opportunities - a simple review process
- 2 CLIENT DISCOVERY - Have rich conversations with business clients**  
Understand the principles of active listening for business coaches  
Engage your business clients in discussing their issues and needs
- 3 ENGAGEMENT - Get clients across the line with clear scope of work**  
Show your business clients how you can help them with a strong proposal  
Provide a service agreement that explains what you will do and how you will do it
- 4 SOFTWARE TOOLS - Use systems and tools effectively to deliver advice**  
Develop internal systems and processes for leverage of coaching services  
Use business advisory software and tools to effectively engage with clients
- 5 IMPLEMENTATION - Achieve results and stay on track with business clients**  
Provide realistic KPIs and milestones to guide the coaching process  
Address client issues and roadblocks in a productive way

## SUPPORTING MATERIAL

- 10 instructional presentations
- Powerpoint notes and slideshow
- Workbooks and assessment tasks
- Documents and templates

**COURSE FEE: AU\$600+ GST PER REGISTRANT (JUST AU\$30 PER CPD HOUR)**

## OUR ELEARNING 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