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

THE PROACTIVE MANAGER

AN ESSENTIAL COURSE FOR COMPLIANCE AND ADVISORY MANAGERS

DRIVE THE GROWTH OF YOUR COMPLIANCE AND ADVISORY MANAGERS

A new 16-part SELF PACED ELEARNING COURSE for managers and partners in public practice.

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 drive compliance work efficiently and the second with the desire and interest to transition to a stronger advisory role. Both roles are extremely important in progressive accounting firms.

Are your managers more suited to compliance or advice? What are you doing to develop their skills to take on these increasingly specialised roles?

In this new 16 part online 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. We'll challenge your perceptions and behaviours and explain best-practice guidelines for workflow and client relationship management at a compliance and advisory level.

Each module incorporates a presentation, support notes, a workbook and assessment tasks linked to specific learning objectives. Track progress and review your personal SMART action plan as you work through the 16-part eLearning course.

WHO'S IT FOR?

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

TO REGISTER, VISIT **www.hightechsofttouch.com.au/product/proactive_manager** or email **enquiry@hightechsofttouch.com.au** for our special deals on > 2 registrations.

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COURSE OUTCOMES

This course provides managers and partners directly responsible for workflow and client relationships with a clear understanding of the roles of compliance and advisory manager. The course will help your managers uncover their core strengths and motivated abilities. It will help them identify the key steps that they need to take to develop their skills at a compliance and/or advisory level.

Learners will be encouraged to consider their personal goals and objectives as the course proceeds. Within all modules, assessment tasks will be provided and SMART actions will be identified to provide a road map for professional development as a manager in public practice.

COURSE OUTLINE

1

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

2

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

3

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

4

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

5

TEAM MANAGEMENT FOR PROACTIVE MANAGERS

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

6

WORKFLOW MANAGEMENT FOR PROACTIVE MANAGERS

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

7

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

8

MEASUREMENT AND REPORTING FOR COMPLIANCE AND ADVISORY MANAGERS

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

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COURSE STRUCTURE

- This is a self-paced online program consisting of 16 individual learning modules.
- All modules incorporate a 4 stage learning process: Understand, Evaluate, Implement and Review
- The program is designed to be completed over 16 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 program.
- Each session incorporates a 45 minute recorded presentation and support material.
- An online assessment is required for successful completion of each session.
- 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 program is eligible for 32 CPD hours, subject to confirmed completion of all modules.
- Registrants will have access to the program for 12 months to review progress.

COURSE FEE: AU$800 + GST PER LEARNER (JUST AU$25 PER CPD HOUR)

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OUR ELEARNING PORTAL

- HTST's eLearning portal gives accountants in public practice with online access to self-paced learning courses with clear learning objectives and assessment tasks in a modular training format. Visit **https://hightechsofttouch.matrixlms.com**
- Your people can complete our courses at a time and place that suits them, both inside and outside working hours. Managers and leaders of firms can monitor the progress of staff enrolled in our courses.

OUR ELEARNING COURSES

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

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