

Courses Offered Q2 2023

The Ideal Practice (10 weeks)

Standardize, Automate, Scale

This course equips you to increase efficiencies and modernize your practice with course materials focused on: determining your ideal client, vetting technologies, refining processing, creating firm-wide processes/checklists, automating data capture, automating payables, maximizing team productivity, and the effective pricing of your services.

Marketing Strategies (10 weeks)

Cast Your Value and Unique Value Proposition

This course provides modern, digital and cost-effective tools and strategies to increase awareness of your practice's unique and differentiated story (i.e., your brand). The courses covers topics like search engine optimization, website design strategies, peer-to-peer referral generation...and more!

Personal & Team Productivity (10 weeks)

Capture, Organize, Prioritize

This course equips you to overcome task overload, achieve and maintain a zero-inbox, harmonize work and life, adopt extreme intentionality and maximize production. It is well-suited to all-size firms from solopreneurs to small firms to client account service (CAS) divisions in regional CPA firms.

Execution Workshops

4 Weeks

Available for Advantage and Premium level membership only. Ideal Practice Class is a prerequisite for the Ideal Execution Workshops

Ideal Client

Achieving the ideal client base is one thing, maintaining that ideal takes intention and dedication. By creating a maintenance plan, you will be able to surgically craft an ongoing ideal client base that aligns with your vision, provides the revenue you desire and makes every day a great day to go to work.

Ideal Business Process NEW

Get started on standardizing and democratizing your operating procedures by identifying and setting up a repository for process definition and training modules; defining standards for process definition and curation; assigning an ambassador to maintain consistency and structure and creating a plan for training your team (or future team) and nurturing adoption.

Ideal You

Join this workshop to get across the finish line on the challenging task of defining your Vision, Mission and Purpose statements

Practice Advancement

Execution Workshops

***All courses subject to change**

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Technology Advisory (10 weeks)

Monitor Your Clients' security issues and technology needs

This course equips you to navigate the sometimes-intimidating world of technology. It provides the structure to perform a comprehensive technology evaluation, diagnose specific areas in need of attention, and create a Strategic Technology Plan to address them.

Succession Advisory (10 weeks)

Strategic Succession Planning

Succession advisory provides a dynamic, long-term value maximization strategy that serves as both an exit plan and a roadmap for continued, strategic business development, addressing the capitalization of intellectual properties, operational efficiencies, company culture...and more!

1 Day Classes

NEW

Maximize your experience at **Scaling New Heights**

You're investing a significant chunk of time and dollars to attend Scaling New Heights. What are your plans for maximizing the return on this investment? Join us for this powerful exploration of key strategies to make the most out of your conference experience.

Cash Flow Management

Proactively address cash flow issues through short-term cash flow projections and long-term cash flow forecasts.

Accounts Receivables Management

Manage your clients' A/R, improve cash flow, predict customer payment patterns, and mitigate bad debt.

Data Security Essentials

Manage your clients' data safely and securely amid cyber security mandates, safe harbor laws and the ever-increasing threat for accountants of cybercrime.

Client Advisory

One Day Course

All classes are subject to change