

Courses Offered Q3 2023

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.

Operational Advisory (10 weeks)

Assess Needs, Build a Strategic Plan & Coach Clients to Execute

Most business owners are experts in delivering their service or product to their customers but are not experts in how to operate a small business. Operational Advisory uses operational indicators to measure and track business health and strategic direction.

Management Advisory (10 weeks)

Enhance Organizational Health & Team Effectiveness

This course equips you to build effective teams, enhance employee performance, define responsibilities, foster accountability, and build distinctive company culture. Deploy the processes, tools, and strategies from this course to guide your clients to intentionally lead and manage their businesses.

Financial Advisory (10 weeks)

Enhance Your Client's Organizational Health and Team Effectiveness

Leverage financial analytics to effectively project financial outcomes, track financial performance, monitor financial position, run what/if scenarios, and recommend course corrections. This courses also addresses profitability models and strategies for driving increases in your client's wealth.

1 Day Classes

Financial Measurements Essentials

The skills and tools you need to convert financial reports into insights and actionable management advice.

One Note

Leverage the power and accessibility of OneNote to maximize your Summit ROI and prepare your post-conference next-actions and priorities before you even leave the event.

Accounts Receivables Management

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

Client Advisory

1 Day Course

All classes are subject to change

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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.



Practice Advancement

Personal and 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 Services

Infuse your life's calling into your client services in alignment with your Vision, Mission and Purpose in a way that has clear and communicative value for your client and empowers you and your team to lean in, grow, and take ownership of outcomes.



Ideal Engagement

In this powerful 4-week workshop you will review your engagement contracts, access tools to better understand and communicate with your clients and setup measurement methods to ensure a successful engagement.



Execution Workshops

***All courses subject to change**