

Courses Offered Q4 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 Essentials (10-Weeks)

Marketing Essentials

A solid marketing plan is a roadmap that gives you strategies, costs and anticipated results. In this course you will learn how to create a strategic marketing plan that will take the guesswork out of your marketing efforts. By having a clear focus that your entire organization can align with, you will be able to specifically add ideal clients at each level of service.

Strategic Pricing (4 weeks)

Neutralizing Price Anchors and Hyper-Commoditization

The bookkeeping and tax professions are facing extreme pricing pressures due to enterprise-level competitors and extreme advancements in data entry automation. This four-week workshop provides field-tested packaging & pricing models, and sales methods, to command the price you deserve.

Execution Workshops (4 Weeks)

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

Ideal Business Process

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 Tech

Start your journey to standardization and automation by defining your business model around a singular group of integrated software solutions.

Practice Advancement

Execution Workshops

***All courses subject to change**

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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.



Client Advisory

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



Introduction to Accounting Forensics

In this introduction to fraud and forensic accounting we will discuss the certifications available, and will you need to be certified. We will explore some basic do's and don'ts as well as some of the most common types of fraud experienced by small businesses.

Data Security

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

Cash Flow Management

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



One Day Classes

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