

Courses Offered Q4 2023

The Ideal Bookkeeping Practice (10 weeks)

Standardize, Automate, Scale
Starts Oct 4 @ 2 pm Eastern

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)

Build a strategy, develop a plan and learn how to fine tune your marketing investment
Starts Oct 3 @ 3 pm Eastern

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
Starts Nov 29 @ 11 am Eastern

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.

NEW

Forensic Techniques and Fraud Detection (3-Week class)

Unveiling the Truth: Forensic Techniques for Uncovering Financial Fraud and Protecting your clients
Starts Nov 29 @ 3 pm

This 3-week course provides participants with an essential understanding of accounting forensics and fraud detection. Participants will develop the skills necessary to recognize red flags, analyze financial data, and contribute to fraud prevention efforts.

Practice Advancement

***All courses subject to change**

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Succession Advisory (10 weeks)

Advising clients through exit and succession strategies
Starts Oct 3 @ 12 pm Eastern

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!

Client Advisory

1 Day Classes

NEW

Email Fraud
Oct 12

While AI advancements offer immense potential, they've also opened doors for cybercriminals to execute more sophisticated and convincing attacks. Delve into the anatomy of email fraud, its multifaceted impact on accounting firms, and best practices to keep your firm safe

Data Security Essentials
Nov 9

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

NEW

Introduction to Accounting Forensics
Nov 2

Learn key concepts, methodologies, and career opportunities in fraud and forensic accounting. Through engaging presentations, interactive discussions, and case studies, participants will gain valuable insights into the world of financial fraud and its mitigation

Cash Flow Management Essentials
Dec 14

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

One Day Course

Execution Workshops (4 Weeks)

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

NEW

Ideal You

Starts Nov 20 @ 10 am Eastern

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

Ideal Tech

Starts Nov 20 @ 3 pm Eastern

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

Ideal Business Process

Starts Oct 2 @ 11 am Eastern

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

Execution Workshops

All classes are subject to change