

Courses Offered Q1 2023

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.

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.

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.

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.

1 Day Classes

Financial Measurements Essentials

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

One Note Class

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

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.

Execution Workshops

4 Weeks

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

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 You

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

Ideal Tech

NEW

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

Client Advisory

Practice Advancement

1 Day Classes

4 Week Workshops