WOODARD®

Practice Advancement Program

The Ideal Practice

Course Description

This course equips you, through education, peer-to-peer collaboration, hands-on exercises, and guided client interactions to build the next version of your practice.

Course Syllabus

Section One – Setting the Stage for a High Functioning Practice

Session 1: Beginning with the End in Mind: Why Invest in the Next Generation of Your Practice

Session 2: Ideal YOU: defining Your Vision of an Ideal Practice

Session 3: Ideal Services Delivered at the Ideal Price

Session 4: Defining Your Ideal Client and Curating your Client Base

Section Two – Setting the Standard in Systems, Processes and Client Services

Session 5: Ideal Technology: Conquering the Technology Challenge

Session 6: Ideal Business Processes: Embracing the Power of Standardized Process- Part 1 Mechanics, Environment, Accessibility

Session 7: Ideal Business Processes: Embracing the Power of Standardized Process – Part 2 Muscle memory, linear thinking, variables

Session 8: Ideal Engagement: Creating an Optimal Experience with Your Ideal Client, Defining Scope, "Right Pricing", Risk Mitigation and Measuring Engagement Success

Section Three – Building Adaptive Capacity for You and Your Team

Session 9: Ideal Team Part 1: Capacity Management – Building an Ideal Team

Session 10: Ideal Team Part 2: Capacity Management – Software & Solution Based Outsourcing; Defining a 90-day plan

*This course is also well-suited to client accounting service (CAS) divisions in regional CPA Firms

**PREREQUISITES: None

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