



## Practice Advancement

### 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.

### Ideal Practice 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 Ideal Practice

Session 3: Ideal Services Delivered to the Ideal Client at the Ideal Price

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

Session 4: Ideal Technology: Conquering the Technology Challenge

Session 5: Ideal Practice Processes: Embracing the Power of Standardized Process- Part 1  
Mechanics, Environment, Accessibility

Session 6: Ideal Practice Processes: Embracing the Power of Standardized Process – Part 2  
Muscle memory, linear thinking, variables

Session 7: Ideal Engagement Part 1: Client Vetting, Client Discovery, Contractual Agreements

Session 8: Ideal Engagement Part 2: Pricing your engagement, Executing the Strategic Plan

#### Section Three – Building Adaptive Capacity for You and Your Team

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

Session 10: Ideal Team Part 2: Capacity Management – Leveraging Shared Services, 90 day plan

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