



## Ideal Practice Symposium

### Workshop Description

Design a comprehensive practice advancement & modernization strategy using "Woodard's Ideal Practice Model™" to maximize productivity, leverage cutting-edge technologies, modernize client interactions, streamline operations, foster strong team culture...and more!

This powerful, highly interactive two-day training experience provides engaging sessions, assisted by Woodard coaches and successful practice leaders, where you will alternate throughout the day between education, workbook exercises and small group interactions with your peers.

### Agenda

Day 1	
7:00 AM	Breakfast and networking (breakfast provided)
8:00 AM	<p>In this morning session, we will explore the first three ideals of Woodard's Ideal Practice Model™.</p> <ol style="list-style-type: none"><li>1. <b>The Ideal You</b> – Define compelling Vision, Mission, and Purpose (VMP) statements to guide your firm's strategies and goals.</li><li>2. <b>Ideal Services</b> – Identify services that align with your firm's unique core competencies to maximize value and profit.</li><li>3. <b>The Ideal Client</b> – Determine the specific characteristics that represent your firm's ideal client.</li></ol> <p>(Includes a 20-minute break)</p>
12:00 PM	Lunch and networking (lunch provided)
1:00 PM	<p>In the afternoon session, you will continue to explore the next three pillars of Woodard's Ideal Practice Model™</p> <ol style="list-style-type: none"><li>4. <b>Ideal Processes</b> - learn techniques to document, design and optimize your internal and client-facing firm processes.</li><li>5. <b>The Ideal Team Culture</b> – complete exercises that will enable you to build an empowered, purpose-driven team.</li><li>6. <b>The Ideal Engagement</b> - employ strategies to set boundaries, clarify expectations, and build strong relationships with your clients.</li></ol> <p>(Includes a 20-minute break)</p>
5:00 – 6:30 PM	Cocktails and Networking (cash bar)
6:30 PM – 8:00 PM	Dinner on your own

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## Day 2

7:00 AM	Breakfast and networking (breakfast provided)
8:00 AM	Keynote Address by Joe Woodard
9:00 AM	<p>The morning session of Day 2 will explore the final pillar of Woodard's Ideal Practice Model™</p> <p>7. <b>The Ideal Technology</b> - You will explore the critical technologies shaping the accounting industry, including accounting production solutions and automation platforms. Along with an analysis of current trends, the session will feature a specialized segment on how to vet technology, offering guidance on evaluating and selecting the right tools for your practice. Tailored to accountants and bookkeepers looking to optimize their technology infrastructure, this session will equip you with practical insights to make informed decisions in an ever-evolving technological landscape.</p> <p>(Includes a 20-minute break)</p>
12:00 PM	Lunch and networking (lunch provided)
1:00 PM	<p><b>Create Your Action Plan</b></p> <p>The afternoon session of Day 2 will coach you through pulling together your work and creating a high-level action plan for your practice based on the 7 Ideals! You will engage in strategic planning, setting clear and attainable goals that align with your practice's vision and mission. The session will include guided exercises to help set your intentions and break down larger objectives into actionable steps. You will wrap up the day with a customized action plan and the confidence to apply the principle in your practice.</p> <p>(Includes a 20-minute break)</p>
3:00 PM	Workshop ends