

Advisory Courses Offered Q3 2022

NEW

Technology Advisory

Monitor Your Clients' security issues and technology needs

This course equips you to navigate the sometimes-intimidating world of technology. It provides the structure to perform a comprehensive technology evaluation, diagnose specific areas in need of attention, and create a Strategic Technology Plan to address them.

Operational Advisory

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.

Management Advisory

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.

Succession Advisory

Strategic Succession Planning

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!

1-Day Advisory Courses

Accounts Receivables Management
Manage your clients' A/R, improve cash flow, predict customer payment patterns, and mitigate bad debt.

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

Cash Flow Management Essentials
Proactively address cash flow issues through short-term cash flow projections and long-term cash flow forecasts.



Practice Advancement Courses Offered Q3 2022

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 Practice Advancement Courses

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 (Advantage/Premier only)

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 Client

Intentionally craft your client base to maximize the lifespan of your most ideal clients, and to pave a manageable path to the back door for non-ideal clients.

***Prerequisite – Ideal Practice**

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.

Practice Advancement



Advisory Courses Offered Q4 2022

Technology Advisory

Monitor Your Clients' security issues and technology needs

This course equips you to navigate the sometimes-intimidating world of technology. It provides the structure to perform a comprehensive technology evaluation, diagnose specific areas in need of attention, and create a Strategic Technology Plan to address them.

Financial Advisory

Enhance Your Client's Organizational Health and Team Effectiveness

Leverage financial analytics to effectively project financial outcomes, track financial performance, monitor financial position, run what/if scenarios, and recommend course corrections. This course also addresses profitability models and strategies for driving increases in your client's wealth.

1-Day Advisory Courses

Financial Measurements Essentials

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

Spending Management Essentials

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



Client Advisory

*Subject to change without notice

Practice Advancement Courses Offered Q4 2022

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.

Personal & Team Productivity (10-Weeks)

Capture, Organize, Prioritize

This course equips you to overcome task overload, achieve and maintain a zero-inbox, harmonize work and life, adopt extreme intentionality and maximize production. It is well-suited to all-size firms from solopreneurs to small firms to client account service (CAS) divisions in regional CPA firms.

Amplify Your Practice (10-Weeks)

Marketing Essentials

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.

Execution Workshops (Advantage/Premier only)

Ideal You

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

***Prerequisite – Ideal Practice**

1-Day Practice Advancement Courses

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Strategic Pricing (4 Weeks)

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Practice Advancement

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