



## Practice Transformation Program

### The Ideal Bookkeeping Practice

Standardize, Automate, Scales

#### PTIB 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 bookkeeping practice. During your journey to the next version of your practice, we will focus on several key areas that drive increased efficiencies, profitability, and client value.

#### Syllabus

##### Section One – Setting the Stage for a High Functioning Bookkeeping Practice

- Session 1 – Beginning with the End in Mind: Why Invest in the Next Generation of Your Bookkeeping Practice
- Session 2 – Defining the Ideal Bookkeeping Practice
- Session 3 – Delivering the Ideal Service to the Ideal Client

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

- Session 4 – Conquering the Technology Challenge
- Session 5 – Embracing the Power of Standardized Process
- Session 6 – Enjoying Seamless Client Collaboration
- Session 7 – Lightening the Load with Automated Data Capture and Integration
- Session 8 – Adding Value to Your Service with Integrated Accounts Payable Management

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

- Session 9 – Effective Pricing for Bookkeeping Services
- Session 10 – Change Management and Communicating the Value



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#### Course Schedule

|                                  |                  |                           |
|----------------------------------|------------------|---------------------------|
| Session 1                        | 4/20/21 Tuesday  | 12:00 – 2:00 p.m. Eastern |
| Study Hall                       | 4/22/21 Thursday | 12:00 – 1:00 p.m. Eastern |
| Session 2                        | 4/27/21 Tuesday  | 12:00 – 2:00 p.m. Eastern |
| Study Hall (Optional)            | 4/29/21 Thursday | 12:00 – 1:00 p.m. Eastern |
| Session 3                        | 5/4/21 Tuesday   | 12:00 – 2:00 p.m. Eastern |
| Study Hall (Optional)            | 5/6/21 Thursday  | 12:00 – 1:00 p.m. Eastern |
| Session 4                        | 5/11/21 Tuesday  | 12:00 – 2:00 p.m. Eastern |
| Study Hall (Optional)            | 5/13/21 Thursday | 12:00 – 1:00 p.m. Eastern |
| Session 5                        | 5/18/21 Tuesday  | 12:00 – 2:00 p.m. Eastern |
| Study Hall (ABS Special Session) | 5/20/21 Thursday | 12:00 – 1:00 p.m. Eastern |
| Session 6                        | 5/25/21 Tuesday  | 12:00 – 2:00 p.m. Eastern |
| Study Hall (Optional)            | 5/27/21 Thursday | 12:00 – 1:00 p.m. Eastern |
| Session 7                        | 6/1/21 Tuesday   | 12:00 – 2:00 p.m. Eastern |
| Study Hall (Optional)            | 6/3/21 Thursday  | 12:00 – 1:00 p.m. Eastern |
| Session 8                        | 6/4/21 Friday    | 12:00 – 2:00 p.m. Eastern |
| Session 9                        | 6/8/21 Tuesday   | 12:00 – 2:00 p.m. Eastern |
| Study Hall (Optional)            | 6/10/21 Thursday | 12:00 – 1:00 p.m. Eastern |
| Session 10                       | 6/15/21 Tuesday  | 12:00 – 2:00 p.m. Eastern |