



## Practice Transformation Program

### The Ideal Bookkeeping Practice

Standardize, Automate, Scale

#### PTIB Course Description

This course equips you through education, peer-to-peer collaboration, and hands-on exercises, to build the next version of your bookkeeping practice. During this journey, 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 – Ideal YOU: Defining Your Ideal Bookkeeping 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 Business Processes: Embracing the Power of Standardized Process – Part 1 Mechanics, environment, accessibility
- Session 6 – Ideal Business 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

## **2021 Ideal Bookkeeping Practice (PTIB)**

Cohorts-Wednesdays 2:30-4:30 PM Eastern

Study Halls-Thursdays 12:00-1:00 PM Eastern

Session 1	9/29	2:30-4:30 PM
Session 2	10/6	2:30-4:30 PM
Session 3	10/13	2:30-4:30 PM
Session 4	10/20	2:30-4:30 PM
Session 5	11/3	2:30-4:30 PM
Session 6	11/10	2:30-4:30 PM
Session 7	11/17	2:30-4:30 PM
Session 8	12/1	2:30-4:30 PM
Session 9	12/8	2:30-4:30 PM
Session 10	12/15	2:30-4:30 PM
<b>Optional</b>		
Study Hall	9/30	12:00-1:00 PM
Study Hall	10/7	12:00-1:00 PM
Study Hall	10/14	12:00-1:00 PM
Study Hall *	11/4	12:00-1:00 PM
Study Hall	11/11	12:00-1:00 PM
Study Hall	11/18	12:00-1:00 PM
Study Hall	12/2	12:00-1:00 PM
Study Hall	12/9	12:00-1:00 PM

\*ABS Focused Study Hall