



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

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

- Session 11: Bonus - Software Solution-Based Outsourcing
- Session 12: Bonus - Outsourcing Bookkeeping Processes to XCM



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#### Course Schedule

Session 1	10/13/20 Tuesday	12:00 – 2:00 p.m. Eastern
Study Hall	10/15/20 Thursday	12:00 – 1:00 p.m. Eastern
Session 2	10/20/20 Tuesday	12:00 – 2:00 p.m. Eastern
Study Hall (Optional)	10/22/20 Thursday	12:00 – 1:00 p.m. Eastern
Session 3	10/27/20 Tuesday	12:00 – 2:00 p.m. Eastern
Study Hall (Optional)	10/29/20 Thursday	12:00 – 1:00 p.m. Eastern
Session 4	11/3/20 Tuesday	12:00 – 2:00 p.m. Eastern
Study Hall (Optional)	11/5/20 Thursday	12:00 – 1:00 p.m. Eastern
Session 5	11/13/20 Friday	12:00 – 2:00 p.m. Eastern
Study Hall (ABS Special Session)	11/13/20 Friday	2:00 – 3:00 p.m. Eastern
Session 6	11/17/20 Tuesday	12:00 – 2:00 p.m. Eastern
Study Hall (Optional)	11/19/20 Thursday	12:00 – 1:00 p.m. Eastern
Session 7	11/24/20 Tuesday	12:00 – 2:00 p.m. Eastern
Session 8	12/1/20 Tuesday	12:00 – 2:00 p.m. Eastern
Study Hall (Optional)	12/3/20 Thursday	12:00 – 1:00 p.m. Eastern
Session 9	12/8/20 Tuesday	12:00 – 2:00 p.m. Eastern
Study Hall (Optional)	12/10/20 Thursday	12:00 – 1:00 p.m. Eastern
Session 10	12/15/20 Tuesday	12:00 – 2:00 p.m. Eastern
Study Hall (ABS Special Session)	12/17/20 Thursday	12:00 – 1:00 p.m. Eastern