



Practice Transformation Program

The Ideal Bookkeeping Practice

Standardize, Automate, Scale

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

Week 1

- 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

Week 2

- Session 3 – Delivering the Ideal Service to the Ideal Client

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

Weeks 3-9

- 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 – Fostering Practice-Wide Adoption for Your Team and Your Clients
- Session 10 – Effective Pricing for Bookkeeping Services

Section Three – Building Adaptive Capacity for You and Your Team

Week 10

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



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Course Schedule

Session 1	7/7/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	7/8/21 Thursday	12:00 – 1:00 p.m. EDT
Session 2	7/14/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	7/15/21 Thursday	12:00 – 1:00 p.m. EDT
Session 3	7/21/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	7/22/21 Thursday	12:00 – 1:00 p.m. EDT
Session 4	7/28/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	7/29/21 Thursday	12:00 – 1:00 p.m. EDT
Session 5	8/4/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	8/5/21 Thursday	12:00 – 1:00 p.m. EDT
Session 6	8/11/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	8/12/21 Thursday	12:00 – 1:00 p.m. EDT
Session 7	8/18/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	8/19/21 Thursday	12:00 – 1:00 p.m. EDT
Session 8	8/25/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	8/26/21 Thursday	12:00 – 1:00 p.m. EDT
Session 9	9/1/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	9/2/21 Thursday	12:00 – 1:00 p.m. EDT
Session 10	9/8/21 Wednesday	2:30 – 4:300 p.m. EDT
Study Hall (Optional)	9/9/21 Thursday	12:00 – 1:00 p.m. EDT