

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



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Course Schedule with Optional Study Hall

All times shown in Eastern Time Zone

Session 1	2/9/22 Wednesday	3:00-5:00 PM
Session 2	2/16/22 Wednesday	3:00-5:00 PM
Session 3	2/23/22 Wednesday	3:00-5:00 PM
Session 4	3/2/22 Wednesday	3:00-5:00 PM
Session 5	3/9/22 Wednesday	3:00-5:00 PM
Session 6	3/16/22 Wednesday	3:00-5:00 PM
Session 7	3/23/22 Wednesday	3:00-5:00 PM
Session 8	3/30/22 Wednesday	3:00-5:00 PM
Session 9	4/6/22 Wednesday	3:00-5:00 PM
Session 10	4/13/22 Wednesday	3:00-5:00 PM
Study Hall	2/10/22 Thursday	3:00-4:00 PM
Study Hall	2/17/22 Thursday	3:00-4:00 PM
Study Hall	2/24/22 Thursday	3:00-4:00 PM
Study Hall	3/3/22 Thursday	3:00-4:00 PM
Study Hall	3/10/22 Thursday	3:00-4:00 PM
Study Hall	3/17/22 Thursday	3:00-4:00 PM
Study Hall	3/24/22 Thursday	3:00-4:00 PM
Study Hall	3/31/22 Thursday	3:00-4:00 PM
Study Hall	4/7/22 Thursday	3:00-4:00 PM