www.hightechsofttouch.com.au

Self Paced eLearning Courses for Accounting and Advisory Firms

Learn Anywhere, Anytime

1. The HTST eLearning Portal

The ‘Digital Revolution’ is leading to significant changes in the way that accounting and advisory firms manage their work, their people and their clients. We help the leaders and managers of these firms use leading technology and strong communication skills to really engage with their clients and make work a lot more interesting and rewarding for their people.

The HTST eLearning platform has been specifically designed to provide people working within accounting and financial advisory firms with a step-by-step guide to developing skills necessary to excel in the modern professional service environment.

All content is directly relevant to public practice. Examples and case studies refer to real life situations experienced in a professional service environment. The core presenter utilises over 16 year’s working directly with accounting and financial advisory firms to achieve sustainability and growth.

In particular, our courses explore the impact that technology is having on the nature of client relationships and workflow within professional firms. This has had a significant effect on the expectations of staff and clients. Our courses examine the impact of these changes and discuss what firms and their people need to be doing now to build sustainable practices.

Key features of our eLearning platform:

1. **The portal gives learners access to self-paced learning courses in modular format**
2. **Learners can complete courses at a place that suits them, within and outside work hours**
3. **Leaders and managers are able to see at a glance how their staff are progressing**
4. **All learners have access to course content for 12 months following their enrolment**
5. **All our courses are designed for CPD points with a certificate of completion provided**
6. **Assessment tasks are qualitative, encouraging learners to develop practical actions demonstrating understanding of the concepts**
7. **Supporting material including workbooks, PowerPoint Slides, templates, scripts and articles are provided with each module.**

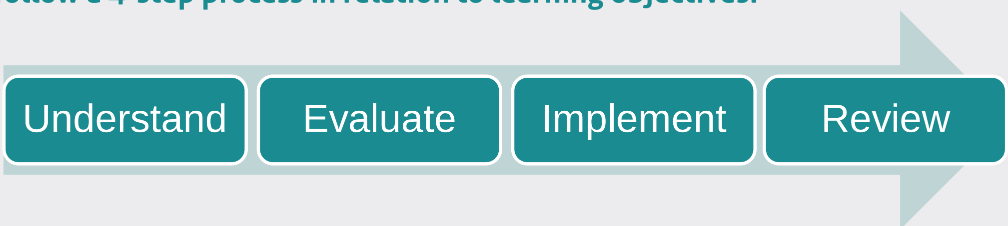
2. Learning objectives and assessment tasks

All courses and modules are structured with specific learning objectives and assessment tasks. Learners are expected to demonstrate that they understand learning objectives and can apply concepts through completion of the assessment tasks.

Example of learning objectives and assessment tasks from ***The Young Accountant*** Course:

Area	Focus Area	Module	Learning objectives	Assessment tasks
5	How to take control of personal workflow	What service agreements and scope of work is all about	Understand what scope of work really means in relation to client engagement	Review the service agreement provided. Compare with engagement letters provided to clients by your firm. What are the differences?
			Identify the key areas of focus in effectively managing personal workflow	How can you more clearly identify client understanding of the service agreement and scope of work?
			Understand how to identify and manage changes in scope of work	Identify 2 recent situations where work was completed that was out of scope. How was this managed? What could have been done differently to get a better result?
				Identify up to 3 SMART actions that you can take in relation to your learnings from this module.
6		Keys to delivering work on time, within budget	Understand the key steps in effectively managing job turnaround and deadlines	Explore your firm's approach to job turnaround and deadlines. How does this influence the way that you start and complete jobs?
			Outline the key steps required to manage job time cost budgets	What could you do differently to better manage the time cost budget associated with the jobs you complete?
			Identify the key actions to take if workflow gets out of control	Develop a checklist to monitor the key steps in delivering jobs on time, within budget
				Identify up to 3 SMART actions that you can take in relation to your learnings from this module.
7	Core actions to effectively engage with clients	Principles of client service excellence for accountants	Understand the principles of client service excellence in accounting firms	Review the firm's approach to client service. Identify the aspects of the firm's approach that you would regard as 'beyond' good service.
			Identify the firm's expectations of you in relation to client relationship management	Identify the key touch points between you and clients during the completion of work. What is working well? What could be improved?
			Outline key actions that you can take in your role as a young accountant to engage with clients	Looking forward, what skills do you need to develop to engage better with clients?
				Identify at least 3 SMART actions you will implement as a results of your learnings.

Our courses follow a 4-step process in relation to learning objectives:



Assessment tasks are designed to help learners implement objectives relevant to their specific situation and capabilities. Learners will often find these tasks challenging, as they will refer to skills, systems, procedures and responsibilities that may not yet be in place within your firm. Indeed, learners are encouraged to suggest changes in the way your firm operates, when it affects their ability to manage their workflow and clients.

3. SMART actions for implementation

The HTST eLearning platform is designed to ensure that learners take practical steps to improve their skills and capabilities. As the course finishes, your learner(s) will have a comprehensive action list in place for further action. They will also be encouraged to make recommendations to their manager in relation to firm systems, procedures and structures.

Learners in all courses are required to identify and complete SMART actions in association with each module. SMART actions are specific, measurable, achievable, realistic and time bound. All actions are documented and included in module assessment tasks.

Example from a Learner in ***The Young Accountant*** Course:

No	Action		URG	IMP	Pri		Current status/next steps
3.1	I will think more about my clients future		2	2	4		When completing work for a client I am going to brainstorm on ideas in regards to managing their tax position going forward. These notes should be collated separately in a digital format for all users to see. This brainstorming will be based on the value-added analytics profile.
3.2	Ask clients what their preferred method of communication is		1	2	2		When initially making contact with a new client and with already engaged clients I will ask them what their preferred method of communication is so that we can be more client centric in our approach to client interaction.
3.3	Take charge of compliance workflow		2	2	4		Take time to understand the scope of the jobs I am going to complete including budget and WIP before I start the job. Make notes for admin who will pick up the job after me so that they can do the same.
4.1	I will complete further research about the clients I work on		2	2	4		Ideally before starting a job I will complete research about the client that I am about to work on. This will be a combination of discussing the client with their manager (if not me), looking into their social media presence and looking at the current news and events in their industry.
4.2	I will look for opportunities to communicate with clients beyond workflow		3	3	9		In doing my research I will probably have topics that I can discuss with the clients or questions I can ask them that are specific to their individual situation.
4.3	I will communicate more with new clients		3	3	9		I will create a list of open-ended questions that I can use with new clients to get a discussion happening. Questions that delve deeper than 'how has your day been?'. Ideally the questions won't lend themselves to a one word answer and will force both of us to talk more.

As the course proceeds, the learner will be required to identify the importance and urgency of each SMART actions. Learners are encouraged to share their SMART actions with their manager and to incorporate them in their professional development program.

4. Course feedback and expert advice

HTST's eLearning courses all feature the opportunity for learners to give and receive direct feedback as they progress through the course. The feedback may include:

1. Advice on how to successfully complete assessment tasks
2. Feedback on how to apply module learnings to real life situations
3. General feedback in relation to access to the online platform

All Learners have access to the course administrator through the direct email portal within the eLearning platform. Where possible, responses are provided same day and certainly within 24 hours.

As learner complete their course, they are asked for direct feedback on the value they received from the course as well as recommendations for the structure and content of the course. You can read some of the feedback received from learners in the section of this document ***'What our learners say'***

5. Manager access to learner status

HTST's eLearning platform incorporates MANAGER access to course status for each of the firm's learners enrolled in courses. A manager may be the learner's direct manager, the senior partner or principal of the firm or a key administrator such as the firm's training and professional development manager.

Managers have access to learner status anytime, anywhere.

There are three key reports available for managers:

- Course completion
- Course enrolment
- Course status

The course status report incorporates detailed information on the following areas of focus:

1. Progress – Click to see which modules have been completed
2. Scores – Click to see scores of individual assessment tasks
3. Grade – Click to see grades on completed assessment tasks
4. Due – the number of assessment tasks required to complete the course
5. Enrolled – the date enrolled and the number of days since the last visit
6. Cogwheel – further information on learner activity

6. What our learners say

These comments reflect the great value that our learners gain from participating in our eLearning courses. Visit our eLearning catalogue online to read other learner reviews.

When I first enrolled in this course, I was sceptical, after all what could I learn after already working in public practice for 4 years? I was wrong - this is the most beneficial course I have completed since deciding back in year 12 that I wanted to be an accountant (even more so than my degree or CPA)! It teaches you so many of the basic skills required to operate as efficiently as possible and encourages you to think in new ways and approach difficult situations from a new angle. The slides/presentations are easy to understand and Dale was always on hand when I had any questions. I would highly recommend this course to any young accountant and can't even imagine how much more rewarding it would be to someone who has just started out in their career.

- Laura Beattie, *The Young Accountant*

Fabulous course, very enlightening. It all seems just like common sense however going through each of the modules it really puts in place procedures that all interlink for the coaching experiences and approaches that should be used.

- Angela Wooding, *Team Coaching for Managers*

This course is simply great! The presentation and slides are straightforward for us to understand, but meanwhile it's highlight things that's important for us accountants to add value to our client, to our firm and to ourselves. As an accountant who's been in the industry for 5 years, I still learn quite a lot from this course. I can imagine how beneficial this is going to be for those who just started their career.

- Ian Feng, *The Young Accountant*

I have really enjoyed this course. It has enabled me to think about my role within the firm in a different way, as someone who is capable of implementing changes instead of just processing tasks. I have become more proactive in my thinking and now able to challenge myself in my role but also able to challenge my manager and the firm.

- Nicole Attwater, *Client Service Administrator*

Thank you for a great course. I really enjoyed the whole thing. Thank you for being prompt with your marking and getting back to me when I had questions and requests. I really enjoyed developing the SMART actions to complete these helped me stay focus and relate the course back to what I was doing at work. I also learnt a lot in the business analysing module and thought this gave me some great goals to work towards. I also came away with some useful tips to help me be more productive which is great. The course helped me get better with time budgets and effectively managing job turnaround. I have seen improvements in my budgeting, which is great. Lastly, I thought the introduction to the course and the future accountant was great! I learnt a lot about what to think about in the future.

- Chanel Flyger, *The Young Accountant*

I love the course it's given me plenty of practical ways to add better value in my firm

- Romeo Caporaso, *Beyond The Numbers*

Fantastic course Dale, you focused on the soft skills which many of us would have simply brushed off as unimportant or "core" to the necessary skill sets / job scope of a traditional accountant. As we gravitate further away from traditional roles, this course has helped me profoundly in identifying possible futures and opportunities in this role.

- Ben Bridgeman, *The Young Accountant*

7. Course catalogue

The following courses are currently available through our eLearning catalogue.

No	Course	Modules
1	The Young Accountant – The future of public practice	16
2	The Proactive Manager – Develop compliance and advisory managers	16
3	Beyond The Numbers – Turn your accountants into analysts	8
4	The Proactive Business Coach – Coach your business clients to success	10
5	Pricing Policies For Professional Firms – Pricing guidelines	10
6	Team Coaching For Managers – Develop your coaching skills	8
7	Build Your Fee Base – Fee growth for managers and partners	12
8	Client Service Administrator – Take control of clients and workflow	12
9	Client Connect - Client management program for firms	12

All our courses have been specifically developed for accountants and financial advisors in public practice. Examples and case studies refer to real life situations experienced in a professional service environment.

In particular, our courses explore the impact that technology is having on the nature of client relationships and workflow within professional firms. This has had a significant effect on the expectations of staff and clients. Our courses examine the impact of these changes and discuss what firms and their people need to be doing now to build sustainable practices.

Each course is designed to be completed in a sequential manner. A module cannot be started until the previous module has been completed.

Each module contains:

- A pre-recorded presentation (usually between 30 and 40 minutes)
- PowerPoint Slides and Slideshow
- Support material including workbooks, templates, articles
- Assessment tasks

Assessment tasks are generally qualitative in nature and designed to assist learners in applying the concepts discussed during the presentation. All assessment tasks are scored with feedback provided to learners as required.

Further information:
Further information on each course is provided in the following pages. IF you would like an updated list of courses, contact dale.crosby@hightechsofttouch.com.au

HTST is adding new courses every month. Visit www.hightechsofttouch.com.au and click on 'eLearning Portal' for further information on our eLearning courses

8. The Young Accountant

Preparing accountants for a future in public practice

Registration	Per individual
Number of learning modules	16
Recommended pace	1 module per week
CPD hours	16
Content	Recorded presentations PowerPoint notes and slideshow Assessment tasks and quizzes
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

The future of public practice accounting is looking quite different to the environment and culture that current managers and leaders of firms experienced when they first came into the industry. Young accountants today are taking on more responsibility for both workflow and client management, allowing more experienced accountants to focus on financial analysis and advice to clients. Accountants need to be strong communicators as well as good analysts.

In this course, we'll show your young accountants how to look beyond the numbers – to develop core skills of effective communication, workflow management, client relationship management, team collaboration and personal time and task management. We will demonstrate how they can show curiosity about numbers and clients to drive innovation in your firm, rather than simply acting as number crunchers. We'll help them to engage with the people around them, become more proactive and take responsibility for their time and their work.

Course content

1. Program induction and orientation
2. Tips and tricks to get value from the program
3. The forward thinking accounting firm and what it means
4. How to better understand clients, services and value
5. What service agreements and scope of work is all about
6. Keys to delivering work on time, within budget
7. Principles of client service excellence for accountants
8. Keys to effective verbal and written client communication
9. What collaboration and team engagement is all about
10. Keys to getting things done in a timely and effective way.
11. Principles of project and task management for accountants
12. How to be really productive in your day to day work
13. How to better understand what clients really want
14. Move from historical analysis to future focus
15. Development of personal SMART actions
16. How to stay on track with your professional development

Who should enrol?

This course is suitable for accountants with up to 5 years' experience in public practice.

9. The Proactive Manager

An essential course for compliance and advisory managers

Registration	Per individual
Number of learning modules	16
Recommended pace	1 module per week
CPD hours	18
Content	Recorded presentations (30-45 min) PowerPoint notes and slideshow Assessment tasks and quizzes
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

As accounting firms move from a dominant focus on compliance in the work they do with clients to a focus on both compliance and advisory skills, the role of manager has never been more critical. Two types of managers are evolving in public practice, the first with the experience and ability to managing compliance work efficiently and the second with the desire and interest to transition to a stronger advisory focus.

In this course, we'll help your managers to identify their core strengths and professional development pathway. We'll outline the essential steps that effective compliance and advisory managers need to take now and in the future to achieve strong results for your firm.
This course is essential for both compliance and advisory managers looking to get to the next level with their capabilities and experience.

Who should enrol?

This course is suitable for managers and partners wishing to specialise in a compliance or advisory role within an accounting firm.

Course modules

1. The 4Q approach to management - workflow, team, clients and growth
2. Uncover your strengths and motivated abilities as manager
3. Effective use of capacity to leverage compliance workflow
4. Key steps to improve compliance productivity and turnaround time
5. The role and responsibilities of advisory manager
6. Keys to transition from compliance to advice as a manager
7. How to set and manage client service excellence standards
8. Management of scope of work and fee for service
9. Evolution from doer to manager and leader of people
10. Keys to drive behavioural change in your team
11. Workflow management essentials for proactive managers
12. Key principles of effective project management for advisors
13. Client discovery and needs analysis techniques for advisors
14. Getting clients across the line with advisory services
15. Essential KPIS for compliance and advisory managers
16. Develop your own measurement and reporting process

10. Beyond The Numbers

How to turn your accountants into analysts

Registration	Per individual
Number of learning modules	8
Recommended pace	1 module per week
CPD hours	8
Content	Recorded presentations PowerPoint notes and slideshow Assessment tasks and quizzes
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

A recent 'Firm of the Future' update recognised that 'accountants need diagnostic skills to interpret financial statements, along with a range of soft skills.' The accountant-analyst can see beyond the numbers to picture the world of the client in relation to business life cycle, cashflow, profitability, value and strategy. Being curious about these numbers can open up immense opportunities for your firm to provide additional services.

How many of the accountants in your firm have these skills and the confidence to use them?
Do they take the time to truly understand the client's financial situation? Do you have processes in place to encourage the identification of opportunities to add real value to clients by looking beyond the numbers?

In this course, we will take your accountants step by step through the process of developing their analytical skills through a strong curiosity about the numbers. We will use practical examples and case studies to guide your team through the process of asking the right questions about the numbers in front of them. We will explain how these insights into the clients' world can be used to create leads and drive new business in your firm.

Course modules

1. The big picture of SME business for accountants
2. What business owners are interested in and why
3. Principles of financial analysis for businesses
4. Management reporting and control
5. Industry benchmarking and analysis
6. Looking beyond the numbers for accountants
7. The business health check and next steps
8. Business client engagement and conversion

Who should enrol?

This course is ideal for any accountant, manager or partner wishing to better understand their business clients and increase advisory revenue. Staff at any level can bring forward analytical insight to senior members of the team to open up opportunities.

A list of module objectives and assessment tasks is available on request.

11. The Proactive Business Coach

How to coach your business clients to success

Registration	Per individual
Number of learning modules	10
Recommended pace	1 module per week
CPD hours	10
Content	Recorded presentations PowerPoint notes and slideshow Assessment tasks and quizzes
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

As experienced business professionals, you have access to lots of resources and a proven set of systems and tools that gives clients the information they need to grow their business.

However, for accountants to really succeed in the advisory world, they need to do more than provide information. They need to assist and guide their business clients in the implementation process.

In this course, we'll take you through a step-by-step process to really engage with business clients in an ongoing advisory and coaching process. We'll show you how to use technology and soft skills together in a way that adds value well beyond traditional accounting work.

Course modules

1. Understand the principles of financial analysis for business coaches
2. Assess business performance and opportunities - a simple review process
3. Understand the principles of active listening for business coaches
4. Engage your business clients in discussing their issues and needs
5. Show your business clients how you can help them with a strong proposal
6. Provide a service agreement that explains what you will do and how you will do it
7. Develop internal systems and processes for leverage of coaching services
8. Use business advisory software and tools to effectively engage with clients
9. Provide realistic KPIs and milestones to guide the coaching process
10. Address client issues and roadblocks in a productive way

Who should enrol?

This course is suitable for client managers and partners who want to work more closely with business clients, accountants and administrators who help to manage client relationships and accounting firms that want to move beyond compliance towards a focus on advice

A list of module objectives and assessment tasks is available on request.

12. Pricing Policies for Professional Firms

A guide to pricing for accounting and advisory firms

Registration	Per firm
Number of learning modules	10
Recommended pace	1 module per week
CPD hours	10
Content	Recorded presentations PowerPoint notes and slideshow Assessment tasks and quizzes
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

The accounting and advisory firm of the future understands that traditional approaches to setting and managing price can be quite unreliable in achieving a strong return on investment. Compliance work is increasingly commoditised and price sensitive. Many firms struggle to persuade clients to pay for services that clearly add value beyond compliance.

1. A modern approach to price management focuses on 4 key areas:
2. Setting the price (the art and science behind defining the right price)
3. Getting the price (how to communicate and negotiate the value of service)
4. Managing the price (delivering services efficiently and appropriately)
5. Reviewing the price (providing the basis for continual improvement)

How effective is your firm at setting, getting and managing price? Are decisions made on a collaborative or ad hoc basis? Does your firm have a pricing policy?

This course is designed to help accounting and advisory firms develop and implement pricing policies relevant to the needs of their clients.

Course modules

1. The psychology of smarter pricing strategies
2. The continuum of pricing options for advisory firms
3. Pricing ground rules for compliance and advisory services
4. Negotiate the fee for service with clients up front
5. Manage work to the agreed scope and fee
6. Address changes in scope of work and pricing
7. Increase fees for advisory and compliance work
8. Establish and manage fixed fee pricing approaches
9. Deal effectively with price sensitivity from clients
10. Establish internal pricing policies for success

Who should enrol?

The course is designed to be presented to the partners, managers and technical staff of accounting and advisory firms directly involved in setting and managing prices.

A list of module objectives and assessment tasks is available on request.

13. Team Coaching for Managers

A structured approach to developing coaching skills

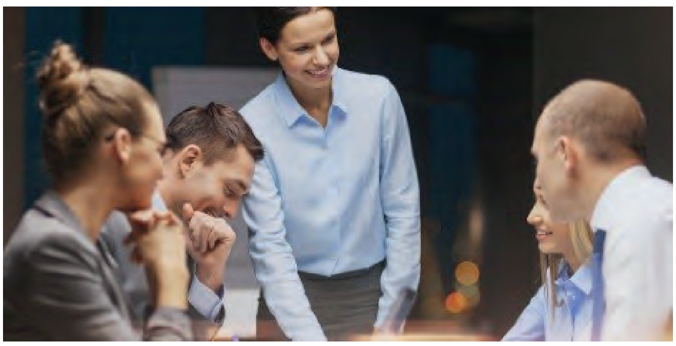
Registration	Per individual
Number of learning modules	8
Recommended pace	1 module per week
CPD hours	8
Content	Recorded presentations PowerPoint notes and slideshow Assessment tasks and quizzes
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

In today's public practice environment, it's critical that managers and leaders can delegate responsibility for workflow and client relationship management in an appropriate way. Without effective leverage, there's simply no time to focus on adding real value to clients.

It's relatively easy to provide directions and solutions to staff. However, it's a lot more difficult to give staff a clear sense of responsibility as well as the motivation to change behaviour. This is where structured coaching can deliver real benefits.

This course is designed to give managers to a greater understanding of the key steps involved in coaching team members to improve performance. We'll show how different behavioural and motivational styles have a real impact on the effectiveness of day to day coaching in professional practice. We'll explain the critical importance of active listening in the coaching process as an essential step in giving staff a clear sense of responsibility for their actions. We'll provide a structured learning environment including assessment tasks, SMART actions and an online forum to provide feedback and advice on real life situations.



Course modules

1. Core principles of effective coaching in accounting firms
2. Understanding and influencing personal motivational styles
3. Coaching styles to achieve performance improvement
4. The use of active listening to drive behavioural change
5. KPI measurement and review for behavioural change
6. Overcoming roadblocks and challenges when coaching
7. Use coaching to direct job budgets and workflow
8. Use coaching to enhance client relationships

Who should enrol?

This course is suitable to both new and experienced managers in public practice.up opportunities.

A list of module objectives and assessment tasks is available on request.

14. Build Your Fee Base

A guide to fee growth for managers and partners

Registration	Per individual
Number of learning modules	12
Recommended pace	1 module per fortnight
CPD hours	18
Content	Recorded presentations PowerPoint notes and slideshow Assessment tasks and quizzes + 2 coaching sessions
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

A focus on fee growth can be one of the most challenging skills to master, especially when the focus in early years of professional development has been on the acquisition of technical skills and competence. What are the firm's expectations of you in relation to fee growth? Do your KPIs include a reference to 'business growth' activities? Do you feel confident in taking a leading role in helping your firm to achieve its financial goals?

This course is designed to help the managers and partners of accounting and advisory firms develop the confidence and skills to be more proactive in selling the firm's services. We will provide specific step-by-step guidelines to help you identify your personal professional brand and service focus, get outside your 'compliance' service mindset and develop client relationships and professional networks for growth. At the commencement of the course, we'll help you set some specific business growth targets. As the course proceeds, we'll work with you to address issues and roadblocks to success.

Course modules

1. Establish your personal business growth plan
2. Find your personal professional brand and service focus
3. How to get outside your compliance comfort zone
4. How to build enduring client relationships for growth
5. Maximise the opportunity for active client referrals
6. Keys to getting prospects across the line with new fees
7. Power and influence in leveraging networks
8. Work with colleagues to identify opportunities
9. Develop external cross-referral relationships
10. Effective online networking strategies for professionals
11. Make time for business development activities
12. Your BD monitoring and measurement process

Who should enrol?

This course is suitable for the managers, partners or principals of any accounting or advisory firm keen to develop their personal business growth skills.

A list of module objectives and assessment tasks is available on request.

15. Client Service Administration

Take control of clients and workflow

Registration	Per firm
Number of learning modules	12
Recommended pace	1 module per week
CPD hours	12
Content	Recorded presentations (30-45 min) PowerPoint notes and slideshow Assessment tasks and quizzes
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

The modern accounting and advisory practice requires a high level of administrative support to free up the capacity and expertise of specialist advisors. No-where is this seen more than in the role that Client Service Administrators and their teams are taking in managing both client relationships and workflow at an administrative level. CSA teams use both technology and soft skills to provide an essential link between clients and the firm's technical staff. In addition, they often add valuable support in relation to internal people management, systems development and marketing functions.

This course is designed to help accounting and advisory firms develop the core capabilities of their administrative staff. The course has 3 key areas of focus – (1) Client service and support, (2) Workflow and task management and (3) Teamwork and collaboration.

Course modules

1. Structure and responsibilities for a CSA role
2. Principles of client relationship management
3. Engagement, pricing and debtor management
4. Client segmentation and marketing strategies
5. Personal time and task management for CSAs
6. Effective capacity and workflow scheduling
7. Managing the throughput of work efficiently
8. Workflow reporting systems for progressive firms
9. Teamwork within the administrative team
10. Working effectively with the technical team
11. Collaborative systems for knowledge sharing
12. Staff key performance indicators and reporting

Who should enrol?

This course is suitable for any accounting or advisory firm looking for its administrative staff take a more proactive role in the management of clients and workflow.

A list of module objectives and assessment tasks is available on request.

16. Client Connect

Your firm's integrated client management system

Registration	Per firm
Number of learning modules	12
Recommended pace	1 module per week
CPD hours	12
Content	Recorded presentations (30-45 min) PowerPoint notes and slideshow Assessment tasks and quizzes
Availability	12 months following registration
Reporting	Manager access to reports on registrant progress

Course outline

Client management is no longer the responsibility of client managers and partners. Everyone in the firm involved with client work should take personal responsibility for the role they play in managing client expectations and delivery of services. For firms transitioning from an annual compliance service to an ongoing advisory service with business and personal clients, it's never been more important to establish clear expectations of client service excellence.

The new financial year is the perfect opportunity to review the way your firm and its people engages with its clients. Over 12 online modules, we'll provide the structure to help your team develop a clear and consistent approach to client service, supported by systems, processes and behavioural guidelines.

Course modules

1. Develop your firm's client care program
2. Team engagement and collaboration
3. Client service charter and behavioural guidelines
4. Client communication standards
5. Client engagement and re-engagement
6. Fee management – scoping, invoicing and payment
7. Client expectations and workflow management
8. Develop service levels based on client profiles
9. Client health check and needs analysis
10. Structure of client interviews and meetings
11. Dealing with client roadblocks and complaints
12. Client feedback and review processes

Who should enrol?

This course has been developed for accounting and advisory firms that are looking to really take control of their client relationships – to move from reactive to proactive in the way they communicate with their clients.

A list of module objectives and assessment tasks is available on request.

17. Fees and Registrations

Visit https://hightechsofttouch.com.au/learning-programs for further information on the fee structure for each course.

Note that some course registration fees are 'per firm' [Client Connect, Client Service Administrator, Pricing Policies] and others are 'per individual.' [The Young Accountant, The Proactive Manager, Beyond the Numbers, The Proactive Business Coach, Team Coaching, Build Your Fee Base].

For further details, contact us directly.

You can register directly through the online shop at https://hightechsofttouch.com.au/

If you are interested in registering more than 2 learners in a course, contact the course administrator dale.crosby@hightechsofttouch.com.au to discuss package deals.

18. Further information on our eLearning courses

Course brochures are available online, simply go to www.hightechsofttouch.com.au and click on the course outline. Alternatively you can email us directly for a brochure or a list of the course learning objectives and assessment tasks.

If you would like further information on how our eLearning courses can help you develop the skills and capabilities of your people, contact us directly:

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