

Multi-Level Training Curriculum for Accounting Professionals Staff & Senior Level



Time Management and Managing Multiple Priorities (MMP)

Time is the most fleeting non-renewable resource in a person's life and once a day has passed it cannot be replaced. In Time Management & Managing Multiple Priorities the ultimate goal is to learn how to be as efficient as possible so your professionals can achieve a quality work-life balance, reduce the likelihood of burn-out, and increase employee retention. This program will help to identify one's own personal time management style and provide techniques to increase effectiveness each and every day. We examine various time management approaches and will help to customize an approach that works specifically for each individual. This program will also help to apply proven time-saving techniques, teach how to stop procrastinating, and to effectively manage interruptions.

Creating Customer Value (CCV)

We all know the #1 RULE of client services – "The Client is ALWAYS right." But what if the client is actually wrong? In "Creating Customer Value" we examine the basic principles of how to keep your clients happy - a happy client stays with your firm. We work with your professionals and show them how to use the YES, NO, YES approach to effectively handle client needs and requests. Attendees learn how to engage clients to build value, navigate challenging situations, and handle difficult conversations. Our program provides ways to identify the issues driving client behavior and manage the appropriate reaction to them. If client retention is important to your firm, this is the program for you.

Introduction to Networking

The old adage "It's not what you know, it's who you know" is still relevant today. Our Introduction to Networking program provides foundational skills for your professionals to become more comfortable with and successful at the art of networking. It is never too early to begin to develop a strong core referral network and we will work with your team to get them accustomed to getting out and meeting new people, enabling them to begin to build strong relationships that they can tap into when they are ready to build their client book. Whether through personal, group, event based, or social networking; attendees will learn the essentials required to make new connections and build enduring, mutually beneficial relationships in both their personal and professional lives.

Business Etiquette & Diversity

Business etiquette is defined as the conduct or procedures that are generally acceptable and polite in the workplace. It is typically a set of unspoken expectations that most people either meet—or find out about when they do not meet them. This course provides guidelines for commonly accepted business behavior, such as how to show respect for yourself and others, how to establish positive connections with anyone, and how to choose polite and positive responses to rude behavior. Many of these same principles can be applied when looking to become more aware of the diverse world and workplace of today. We will help participants understand what diversity is all about, and how they can help create a more diverse world at work. Raising their consciousness of inclusion, sensitivity, and respect will enable attendees to better understand the subtle ways that bias occurs and how small, subconscious behaviors can inadvertently end up devaluing others. At the end of this program your professionals will have a better understanding of basic courtesy and manners, they will know how to build and maintain relationships, how to increase inclusion at the organizational level, and learn how to encourage diversity.

Effective Communication

According to a recent SIS International Research study, 70% of small to mid-size businesses say ineffective communication is a major problem and when communication fails, it can cost your company valuable time and money. For the better part of every day we are communicating with others. Whether it's an employee reporting back to leadership, a speech being delivered in the boardroom, or simply talking about the day with your spouse...it all means something. All too often, people make the assumption that communication is primarily verbal or written, however when we communicate with others, only about 10 percent of the message being delivered is based on the actual words being spoken. The remaining 90 percent is communicated by our facial expressions, body language and tone of voice.

In Effective Communication Skills we will help participants to understand the different methods of communication such as body language, eye contact, and tone of voice and how to make the most of each of them. Your professionals will learn how to prevent costly miscommunication problems by assessing their own personality styles and how they impact the message being conveyed. We will examine how to build rapport with active listening skills, good questions, and encouragement. Attendees will also begin to understand the value of assumptions and how they can be destructive in communication and we will help them to identify common communication filters such as age, race, and gender and their impact on communication. Therefore, in order to reduce wasted time and money, it is imperative for professionals to be able to communicate every message clearly and concisely.

Supervisor & Manager Level

Introduction to Business Development

In Intro to Business Development we examine the fundamentals including what business development is and why it is important not only for firm growth, but for professional growth as well. Attendees will learn about the sales funnel and how to develop and manage a robust pipeline of quality prospects. We will walk through the various steps of the sales process starting with prospecting and leading all the way to closing and follow-up repeat sales. This course is a great precursor to Business Development for Accounting Professionals.

Next Generation Leaders - (Millennial Management Training)*

Today, the Millennial generation has surpassed Generation-X to become the largest share of the American workforce and many Millennials now find themselves managing older workers. The transition from a role as a staff accountant to becoming the supervisor of others can be one of the most challenging transitions in one's career. At first, it just does not feel quite right since new leaders must learn how to balance managing others and managing their own time.

In Next Generation Leaders, Corporate Ladders focuses on helping Millennials to lead a multi-generational workforce including both younger and older workers, some of whom may be resentful of that fact. We will help your professionals learn how to become "Accounting Entrepreneurs" and build their practice as CPA's by taking a personal interest in the success of the firm and the colleagues on their team. The program identifies and provides the tools and concepts necessary to begin the journey toward becoming a highly effective Leader and developing a strong team of supporters. This program also addresses topics such as delegating, motivating a team, and transiting from the supervised to the supervisor, which are all essential to becoming a future leader.

*This program may include additional coaching session.

Management Training - Leadership, Coaching and Performance Management*

Becoming a Manager is often the first major transitional stage in the accounting profession, as it requires changing the mindset from doer to leader. As a leader, one of the most important responsibilities is to develop people and coach them to perform at their highest level. In doing so, your staff will be empowered to make better decisions, creatively solve problems that are holding them back, learn new skills, and position themselves for further career advancement. Corporate Ladders' Leadership, Coaching and Performance Management program provides the necessary training and essential skill building required to get Managers on the path toward becoming an effective leader and coach. Topics such as trust building, delegating, motivating, and providing timely feedback are discussed and reviewed.

*This program may include additional coaching session.

Future Leaders Management Bootcamp*

Future Leaders Management Bootcamp begins with a 363° Leadership Assessment with input provided by a combination of peers, Partners, and (future) direct reports. The Leadership Assessment will help to identify your future leaders' greatest strengths and areas for improvement based on feedback provided from colleagues. This approach is especially useful for individual development planning, leadership training, and team building. The assessment will be followed by a one month intensive "boot camp" which will cover all of the topics included in leadership training and will also impart the essential skills and best practices needed to become a successful leader, develop and coach a team, and become an accounting entrepreneur. Once the foundational skills have been learned, we will continue the engagement with a series of one-on-one confidential coaching sessions designed to remediate any challenge areas, reinforce knowledge, and add an additional level of accountability to ensure success.

*This program includes several additional coaching sessions.

Sr. Manager and Partner Level

Business Development for Accounting Professionals*

Business Development for Accounting Professionals is our signature program. It provides proven techniques to help your professionals effectively increase revenues and assure client satisfaction. Our program has been developed using the insights and attributes of over twenty-five top business development and sales training programs all specializing in selling complex, solution oriented products and services, with new client acquisition and client retention at the core of our program. While new client acquisition is our specialty, it goes hand-in-hand with becoming a “Trusted Advisor” to clients. Becoming a trusted advisor enables your professionals to become so entrenched with a client that it would become nearly impossible to leave your firm for another. Our modules on “Selling on Value” along with the “Vision and Value Match” teach accounting professionals how to move away from fee and price negotiations while actively differentiating themselves from other providers. However, asking your accountants to do something they are not comfortable doing can often lead to frustration and a false sense of failure. Creating a “Personal Business Development System” will help your professionals to create and implement a sound personal marketing plan that works for them.

*This program includes two additional 1-on-1 coaching sessions with each participant.

Effective Presentation Skills (Small or Large Group)*

Often times, an excellent presentation can mean the difference between winning and losing a client. Corporate Ladders’ Effective Presentation Skills program will give your professionals the skills necessary to dramatically improve their presentation and public speaking abilities. We discuss the essential verbal and non-verbal skills needed to deliver a clear and concise message with confidence and handle question and answer sessions effortlessly. This program will equip each attendee with the ability to develop and support a chosen topic and teach them to control body language, gestures, and eye contact. It will also help foster an awareness of the audience through effective listening skills, enabling them to handle and address difficult questions.

*This program includes a 1-on-1 videotaped coaching session.

Creating and Leading a Business Development Centric Firm**

Firm leadership has never been more challenged than in today’s business environment. Faced with a never-ending cavalcade of regulatory requirements along with a changing economic environment has made the management of CPAs and the business side of firm management more complex than ever before. In this program, firm leadership will learn about and assess the overall changes to the business and the environment affecting today’s accounting industry. The concepts discussed will help attendees better adapt to some of these changes and effectively engage in the “new normal” of the business of accounting.

As leaders of the firm, revenue growth is paramount to the firm’s success. Revenue growth comes largely through the effective and successful business development activities of CPAs in their practice group and the firm in general. Attendees in this program will learn the key elements of business development required to effectively manage and motivate accountants working under their supervision. The power of “Coaching” to assist, manage, and motivate staff will be introduced.

**This program is the supervisory complement to “Business Development for Accounting Professionals” and includes one personal, one-on-one coaching session for each participant.

Any Level

Professional Coaching

Behind every successful athlete is a great coach. Whether you are Tiger Woods or LeBron James, there is someone in the background helping to bring out your best and hold yourself accountable. Corporate Ladders provides coaching for executives much in the same way. Our professional coaches work with you one-on-one to address the professional challenges you face and help you navigate your way to a solution. Perhaps you are considering a merger or need help closing a new engagement, we can help! Perhaps it is an employee issue or new strategic direction for the firm, a sounding board may be the answer.

Coaching builds a collaborative relationship based on trust and we strive to provide an environment in which personal development and performance improvement will occur. All coaching is conducted in a "safe environment," following the concepts of client privileged information. Our coaching is offered in a way that enables you to learn, understand, and grow as a result. We will always present ourselves in an objective manner that looks for and promotes discovery of possibilities, solutions, and alternatives. As your coach, we will sometimes seek to stretch you beyond your comfort zone in the hope of leveraging your current capabilities. We will also look to identify and shore up gaps in attitudes and/or behaviors that impede your personal and professional development.

Using our methodology, we will work to help you to achieve extraordinary performance by focusing on whatever you need to achieve the highest level of success. Corporate Ladder's coaches are knowledgeable, discreet and have your best interests in mind... Your success is our success.