

PRACTICE MANAGEMENT ENABLED

Optimise Your Firm

- ✓ **Have you considered the most common industry wide practice management issues?**
- ✓ **Does your firm have the right structure and mindset to efficiently offer your accounting services?**
- ✓ **Do you know what services you can offer successfully to clients to get them engaged?**
- ✓ **Who are the right clients to target to create success?**
- ✓ **Do you currently have the ideal staff with the appropriate skill set?**
- ✓ **What risks and bottlenecks do you need to address?**

With so many time pressures, many practitioners find it difficult to focus on the development of their practice. The frequent result is that practice performance is sub optimal.

Practice Management Enabled is an ongoing program that ensures focus on building your practice is not lost.

Group coaching can only assist to a point, as it is difficult for the specific issues facing an individual practice to receive sufficient focus. In contrast, our tailored approach ensures that outcomes can be optimised and that implementation plans are tailored to the unique circumstances of your firm.

An experienced external practice adviser brings objectivity as well as knowledge as to how other practices have achieved success.

Sign up and commit to an implementation program to get your Practice Management plan on target!

Receive free email & ongoing phone support.

Get started with a 45 minute complimentary Practice Management Assessment with Mark Holton - find out where to start to streamline practice management in your firm.

How will it work?

Mark's approach to practice management implementation is about bringing order to the overwhelm through a streamlined strategy.

Suggested program customised to your practice:

Preliminary 45-minute assessment.

Face to face or by Zoom depending on location.

From this process you will know where your firm is today and what it needs to do to achieve success in the future.

Outcome - Step 1:

The first step in the Practice Management Enabled process is to conduct a Practice Management Implementation Planning Day.

This day is "in house" at your firm and follows a very structured process. The product of this day is a Practice Management Implementation plan that the firm can follow to get the right systems, processes and people resources in place.

The day will cover;

- ✓ Developing strategic and business plans
- ✓ Building performance management systems
- ✓ Improving processes
- ✓ Optimising utilisation of technology
- ✓ Developing a practical, down to earth marketing plan
- ✓ Improving utilisation of resources
- ✓ Ensuring succession plans are effectively developed and managed
- ✓ Looking at potentially acquiring other practices
- ✓ Improving governance and accountability

The next stages include:

- + Full day onsite meetings - quarterly
- + Video conferences to follow up actions and deal with any issues.
- + Follow up teleconferences to monitor progress between face to face meetings.

Your Investment:

Pricing is dependent on different factors and will be confirmed when you speak with Mark.

Please note - this is not a quick fix program. Each firm is different and has different goals and objectives as well as issues that need to be addressed. The program will be tailored to each firm and is for firms that are prepared to put in the work to make the changes required. Commitment to the program is integral to success. You will be guided each step of the way with ongoing support.

1st Quarterly

- Establish or critique your firm's practice management plan.
- Getting your team on the bus – building commitment.
- Developing and finding your ideal target clients.
- Agree on firm structure and infrastructure.
- Develop an initial structured workflow plan.

2nd Quarterly

- Where are we at?
- Develop a capacity and resource plan.
- Agree on a client engagement and service delivery plan.
- Review of form customer relationship management system.
- Develop and or review practice technology plan.

3rd Quarterly

- Where are we at?
- Client feedback and satisfaction survey with constructive critique.
- Review of tools being effectively used.
- Assess future marketing activity.
- Review of key performance indicator tracking and management.

4th Quarterly

- Review and update implementation plan.
- Additional training as required.
- Establish next year's implementation, training and marketing plan.
- Development and or review of firm succession plan.