Client Development Programme

Introduction

The Business Fitness NZ Client Development Programme consists of topics organised into the following categories.

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Using and reviewing work papers	Page 3
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If you find that you need additional training that falls outside our programme, we can talk to you about what you need and run a session specific to you.

Please don't hesitate to call us on 0800 10 58 60 or email training@businessfitness.co.nz with any Business Fitness learning-related queries.

Business Fitness On Demand

As you scroll through this programme, you'll see some sessions are available on demand

These sessions are typically 30-45 minutes long and all cost $95+GST.

This is similar to renting a DVD - when you need it, you book online or by phone. We then send you a disk of the session to view at your own pace on your PC. This means different learners can view, stop and start the session as it suits. You then send the disk back to us within 14 days.

We also send you a Quick Guide (with key points and tips) - this is yours to keep.

Click here to book online

Webinars

Many sessions are available as a webinar

We schedule these based on need, what's happening in the industry and with our content.

If you see a webinar you'd like to attend but find it's not currently scheduled, please click here to register your interest, email us at training@businessfitness.co.nz or ring us on 0800 10 58 60.

You only need to book once for your firm. This gives you one connection for one computer - as many people as can gather round the screen can take part in the session. If you use a data projector, lots of people can take part.

Click here for answers to frequently asked questions about webinars.

Fundamental Topics for General Users

User Overview

on demand

Suited to: New team members or team members who have not yet really used our content.

Description: As new team members join your firm, you need to acquaint them with using the document manager software to find and use Business Fitness content. This will save time and give you the best results.

This topic includes:

- How to navigate the document management software and our content
- How to use the content and software within Microsoft Word
- Searching techniques, tips and tricks for content
- Procedures (the 'heart' of our content) and how they are categorised
- Creating documents and saving to clients' files

Click here to book online

Build Your Own Content

webinar

(45 mins, $95+GST)

Suited to: All team members

Description: This is a best practice session for those who need to develop their own procedures.

This topic covers how to:

- Document your in-house procedures from scratch
- Create your own tools
- Submit the procedures/tools to your administrator to add to your firm's Business Fitness content

Click here to register your interest

Hot Content Overview

webinar

(45 mins, $95+GST)

Suited to: All team members

Description: A look at popular Business Fitness content that has been updated, what new content is available and how to access it.

Click here to register your interest

FAQ Content

webinar

(45 mins, $95+GST)

Suited to: All team members

Description: A look at popular Business Fitness content that has been updated, what new content is available and how to access it.

Session: December 2010

Click here to register your interest

Administrator and Leader Topics

New Administrator Training

on demand

Suited to: New administrators

Description: Administrators are responsible for ensuring that your content is kept up to date and that changes specific to your firm are made. This topic covers:

- Downloading new and updated content received from us
- Customising content and adding new content
- Maintaining your News page
- Adding new weblinks and resources to your firm's Knowledge Base content
- Customisation, tools and functionality

Click here to book online

Additional Administrator Training

on demand

Suited to: Those administrators who know the basics and want to take it to the next level

Description: Builds on New Administrator Training and covers:

- Additional Document Manager functions and reporting
- Best practice approaches to customising and managing content
- Encouraging better use of content in your firm

Click here to book online

Template Design and Customisation

on demand

Suited to: Administrators

Description: An in-depth look at designing and customising your in-house templates for letters, faxes and reports, and how to use them with Business Fitness NZ content.

Click here to book online

Knowledge Base

on demand

Suited to: Administrators and leaders

Description: How to set up an effective Knowledge Base for your firm and what sort of material you can put in it.

Click here to book online

Business Forward

on demand

Suited to: Administrators and leaders

Description: How to use the Business Forward newsletter to send to your clients, including inserting logos, customising, ways to print, email, or post it on your website.

Click here to book online

Content and Web

on demand

Suited to: Content administrators and web administrators

Description: How to utilise Business Fitness content in conjunction with your website. This includes suggestions for types of content you can upload, and how to draw in potential business via content on your website.

Click here to book online

Invoicing Setup ($95+GST)

webinar

Suited to: Partners and administrators

We recommend that both partners and administrators attend as the process requires both decision-making and administrator expertise.

Description: How to set up and use the invoicing function in Acclipse Document Manager and run reports.

Click here to register your interest

Work Paper Topics

Compiling Integrated Work Papers

webinar

(90 mins, $250+GST)

Suited to: Accounting team members who prepare annual account files

Description: Discover the efficiencies that can be made by utilising our work papers that integrate with your firm's general ledger. This session covers:

- Using the work bench
- Compilation and review work papers (from a user's perspective)
- Balance sheet work papers
- Profit and loss work papers

This session doesn't cover the initial setup of work papers (as this is an administration function and is covered in the Administrator Setup guide).

Note if you're using static work papers, you'll still benefit from this session as it takes you through the key work papers.

Sessions: 13 October 2010

Click here to register your interest

Integrated Work Papers from a Reviewer's Perspective

webinar

(60 mins, $150+GST)

Suited to: Senior managers and/or partners who review annual accounts.

Description: This topic covers the same work papers as the Compiling Integrated Work Papers topic, but from a reviewer's perspective.

Note if you're using static work papers, you'll still benefit from this session as it takes you through the key work papers you will review.

Sessions: 20 October 2010

Click here to register your interest

ICA Reconciliation and Dividend Preparation

webinar

(60 mins, $150+GST)

Suited to: Accounting technicians with at least an intermediate level of knowledge of work papers

Description: Covers the preparation of the ICA reconciliation, and preparation of dividend work papers and associated minutes.

Session: August

Click here to register your interest

FIF, PIE and Other Investment Income

webinar

(45 mins, $150+GST)

Suited to: Partners and accounting technicians

Description: Takes you through the work papers used for FIF, PIE and other investment income and uses examples to show how they can be used.

Click here to register your interest

Focus on Farming and Livestock

webinar

(60 mins, $150+GST)

Suited to: Accounting technicians with at least an intermediate level of knowledge of work papers

Description: Covers the preparation of the farming and livestock work papers.

Click here to register your interest

Tax Topics *with nsaTax*

GST Rate Increase – The Hard Facts

webinar

(90 mins, $180+GST)

Suited to: Entire Accounting and Partner team

Presenter: Lisa Murphy, Director, nsaTax

Description: This session will cover the upcoming GST Rate Increase and how to handle the myriad of transitional and technical issues.

Click here to book online

Client Development Programme

Trust Administration Topics

Trust Administration (90 mins, $150+GST)

webinar

Suited to: Accounting technicians and administration team members

Description: For firms offering trust administration services to clients, this covers the detailed procedures for the initial setup, liaison with the client and their solicitor, and ongoing administration of your client's family trust (including the annual gifting programme).

Click here to register your interest

Trust Risk Reviews (90 mins, $150+GST)

webinar

Suited to: Partners and administration team members

Description: This topic is for firms who are about to conduct an initial Trust Risk Review for their clients' trusts. It covers the detailed procedure and tools for marketing the service, undertaking the reviews, liaising with the client/solicitor, and actions required as a result of the review.

Click here to register your interest

Company Administration Topics

Company Admininstration – Formation and Setup (90 mins, $150+GST)

webinar

Suited to: Administration team members

Description: The detailed procedures for formation and setup of a Company.

Click here to register your interest

Company Admininstration – Ongoing (90 mins, $150+GST)

webinar

Suited to: Administration team members

Description: The detailed procedures and tools for ongoing administration of Company.

Click here to register your interest

Company Admininstration – Cessation (90 mins, $150+GST)

webinar

Suited to: Administration team members

Description: The detailed procedures for cessation of a Company.

Click here to register your interest

Other Procedure-Based Topics

New Clients (90 mins, $150+GST)

webinar

Suited to: Partners, office managers, practice managers

Description: Includes the detailed procedure/tools for initial screening, meeting, initial setup and administration for new clients.

Sessions: 11 November 2010

Click here to register your interest

Debtor Management (60 mins, $150+GST)

webinar

Suited to: Partners, office managers, practice managers

Description: A practical approach to managing your debtors (including myths and tips).

This topic takes a detailed look at the Business Fitness debtor management content (procedures and tools) that will assist you to reduce your debtor days.

Sessions: 18 November 2010

Click here to register your interest

ACC Administration and Advisory (60 mins, $150+GST)

webinar

Suited to: Partners, office managers, practice managers

Description:

Click here to register your interest

Dairy Base (60 mins, $150+GST)

webinar

Suited to: Accounting Technicians

Description: For firms with dairy farming clients, are you using DairyBase?

This topic covers:

- Marketing DairyBase to your farming clients
- Collecting and coding data
- Compiling the financial information
- Producing benchmarking reports for your clients

Click here to register interest

Strategic Topics with Viv Brownrigg

Workflow, Capacity Planning & Scheduling (90 mins, $250+GST)

webinar

Suited to: Partners, practice managers and senior managers

Description: This fast paced 90 minute webinar focuses you on building a robust team capacity planning model, enabling you to properly schedule your 2011 compliance work.

Using our latest work flow content, Viv will take you through capacity planning, job planning and client engagement and interviewing techniques using both customised and generic client questionnaires. With the emphasis on job budgets and proper resource allocation, poor workflow performance and the dreaded 'pick up and put down' syndrome becomes a thing of the past.

Sessions: 3 & 17 November 2010, 9 February 2011

Click here to register your interest

Engaging Clients on an Agreed Fee Basis (60 mins, $195+GST)

webinar

Suited to: Partners

Description: Eliminate fee queries, fee consternation and the relationship tension linked to fee uncertainty that you experience in your business.

Viv will cover the fee options clients truly want, and the implementation of agreed fees on a client by client basis, from client education to engagement and documentation, using our latest content.

You will also benefit from Viv's considerable work with closely mentored firms like yours as she shares with you the typical statistics on clients' preferences.

Sessions: 10 November 2010, 17 February 2011, 10 March 2011

Click here to register your interest

The Good, The Bad and The Ugly 2010 (90 mins, $250+GST)

webinar

Suited to: Partners

Description: Viv brings to you the results of GBU 2010, the most comprehensive benchmarking survey of the NZ accounting profession.

Accelerate your practice performance as Viv shares with you the top traits of highly performing accounting businesses and relates their performance to necessary partner behaviours, leading management styles and essential business processes.

This is a very special 90 minutes, packed with practical techniques for boosting growth, profit and cash flow performance.

Sessions: 12 & 19 October 2010

Click here to register your interest

The Business of Managing an Accounting Business (90 mins, $250+GST)

webinar

Suited to: Partners

Description: Understand the role of a true Business Manager and the importance of the right mix of administration team members, many of who can produce significant fees. Explore the reasons why traditional management models involving a Managing Partner or splitting management responsibilities amongst partners don't often succeed. Share the experiences of firms who have taken the leap and employed a Business Manager, ensuring team performance is well managed, partner capacity for client engagement is boosted and client service projects finally get to market!

Viv will take you through the typical profile and role descriptions for Business Managers, Client Service Assistants (a better way to describe an administrator) and for those in demand partners, the Executive Assistant. Viv will demonstrate the key deliverables that the right appointments can bring to your business. After 90 minutes you will have a clear path for resolving your business management challenges.

Sessions: 8 September, 27 October 2010

here to register your interest

Utilising Spare Capacity in the Summer Months (90 mins, $250+GST)

webinar

Suited to: Partners

Description: Running out of work for the team in February/March/April? Make best use of your team, utilise your Business Fitness NZ content and add superb service lines to existing clients. We'll canvass everything from Trust Risk reviews, PPSR and Company Administration Management, asset protection, risk management, ACC premium and cover management, BankLink and Xero development, just to name a few.

This session will be packed with simple tasks (many of them billable) that your lower level accounting team can take care of, boosting their productivity and readying the firm for the new tax year.

Sessions: 28 October 2010, 16 Feb 2011

Click here to register your interest

7 Habits of Highly Effective Accountants (90 mins, $250+GST) complimentary for your partner(s) if you attended The Accountants' Big Day Out 2010

webinar

Suited to: Partners

Description: Based on the same session from The Accountants' Big Day Out 2010... What sets the amazing apart from the average; the truth about efficiency and public practice; the seven year itch, how to scratch it and stay in Practice; getting serious about client service and practice performance.

Click here to register your interest

Summary of Topics and Webinars Scheduled

Category	Topic	Schedule (or On Demand)
Fundamental Topics for General Users	User Overview	On Demand Video (click here)
	Build Your Own Content	Register interest (click here)
	Hot Content Overview	Register interest (click here)
	FAQ Content	Register interest (click here)
Administrator and Leader Topics	New Administrator Training	On Demand Video (click here)
	Additional Administrator Training	On Demand Video (click here)
	Template Design and Customisation	On Demand Video (click here)
	Knowledge Base	On Demand Video (click here)
	Business Forward	On Demand Video (click here)
	Content and Web	On Demand Video (click here)
	Invoicing Setup	Register interest (click here)
Work Papers Topics	Compiling Integrated Work Papers	13 October 2010 (click here)
	Work Papers Reviewer's Perspective	20 October 2010 (click here)
	ICA Reconciliation and Dividend Preparation	August 2010 (click here)
	FIF, PIE and Other Investment Income	Register interest (click here)
	Focus on Farming and Livestock	Register interest (click here)
Tax Topics *with nsaTax*	GST Rate Increase – The Hard Facts	19, 26 August 2010 (click here)
Company and Trust Administration Topics	Trust Administration	Register interest (click here)
	Trust Risk Reviews	Register interest (click here)
	Company Admin – Formation & Setup	Register interest (click here)
	Company Admin – Ongoing Administration	Register interest (click here)
	Company Admin – Cessation of Company	Register interest (click here)
Other Procedure-Based Content Topics	New Clients	11 November 2010 (click here)
	Debtor Management Content	18 November 2010 (click here)
	ACC Administration and Advisory	Register interest (click here)
	DairyBase	Register interest (click here)
Strategic Topics	7 Habits of Highly Effective Accountants	Register Interest (click here)
	Workflow, Capacity Planning and Scheduling	3 & 17 November 2010, 9 February 2011 (click here)
	Engaging Clients on an Agreed Fee Basis	10 November 2010, (click here) 17 February, 10 March 2011
	The Good, The Bad and The Ugly 2010	12 & 19 October 2010 (click here)
	The Business of Managing an Accounting Business	8 September, 27 October 2010 (click here)
	Utilising Spare Capacity in the Summer Months	28 October 2010, 16 February 2010 (click here)

Additional sessions will be scheduled based on demand and what's happening in the industry. Keep an eye out for your client development newsletter and our website (www.businessfitness.co.nz).