

# Client Development Programme

## Introduction

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

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General users	⇒
Administrators and leaders	Page 2
Using and reviewing work papers	Page 3
Administering Trust and Companies	Page 4
Other procedure-based content	Page 4
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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](mailto: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](mailto: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

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### 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

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### 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

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### 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

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### 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

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### 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

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### 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

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### 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

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## Work Paper Topics

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### 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:** 22 July, 13 October 2010

Click [here](#) to book online

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### 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:** 28 July, 20 October 2010

Click [here](#) to book online

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### 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

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### 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

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### 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

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## 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).

**Session:** 21 October 2010

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.

**Session:** 26 October 2010

Click [here](#) to register your interest

## Company Administration Topics

### Company Administration – 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 Administration – 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 Administration – 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:** 21 July, 8 September, 27 October 2010

Click [here](#) to book online

### 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.

**Session:** 4 August 2010

Click [here](#) to book online

# Client Development Programme

## Summary of Topics and Webinars Scheduled

Category	Topic	Schedule (or On Demand)
Fundamental Topics for General Users	User Overview	On Demand Video (click <a href="#">here</a> )
	Build Your Own Content	Register interest (click <a href="#">here</a> )
	Hot Content Overview	Register interest (click <a href="#">here</a> )
	FAQ Content	Register interest (click <a href="#">here</a> )
Administrator and Leader Topics	New Administrator Training	On Demand Video (click <a href="#">here</a> )
	Additional Administrator Training	On Demand Video (click <a href="#">here</a> )
	Template Design and Customisation	On Demand Video (click <a href="#">here</a> )
	Knowledge Base	On Demand Video (click <a href="#">here</a> )
	Business Forward	On Demand Video (click <a href="#">here</a> )
	Content and Web	On Demand Video (click <a href="#">here</a> )
	Invoicing Setup	Register interest (click <a href="#">here</a> )
Work Papers Topics	Compiling Integrated Work Papers	22 July, 13 October 2010 (click <a href="#">here</a> )
	Work Papers Reviewer's Perspective	28 July, 20 October 2010 (click <a href="#">here</a> )
	ICA Reconciliation and Dividend Preparation	August 2010 (click <a href="#">here</a> )
	FIF, PIE and Other Investment Income	Register interest (click <a href="#">here</a> )
	Focus on Farming and Livestock	Register interest (click <a href="#">here</a> )
Company and Trust Administration Topics	Trust Administration	21 October 2010 (click <a href="#">here</a> )
	Trust Risk Reviews	26 October 2010 (click <a href="#">here</a> )
	Company Admin – Formation & Setup	Register interest (click <a href="#">here</a> )
	Company Admin – Ongoing Administration	Register interest (click <a href="#">here</a> )
	Company Admin – Cessation of Company	Register interest (click <a href="#">here</a> )
Other Procedure-Based Content Topics	New Clients	11 November 2010 (click <a href="#">here</a> )
	Debtor Management Content	18 November 2010 (click <a href="#">here</a> )
	ACC Administration and Advisory	Register interest (click <a href="#">here</a> )
	DairyBase	Register interest (click <a href="#">here</a> )
Strategic Topics	7 Habits of Highly Effective Accountants	4 August 2010 (click <a href="#">here</a> )
	Workflow, Capacity Planning and Scheduling	3 & 17 November 2010, 9 February 2011 (click <a href="#">here</a> )
	Engaging Clients on an Agreed Fee Basis	10 November 2010, (click <a href="#">here</a> ) 17 February, 10 March 2011
	The Good, The Bad and The Ugly 2010	12 & 19 October 2010 (click <a href="#">here</a> )
	The Business of Managing an Accounting Business	21 July, 8 September, 27 October 2010 (click <a href="#">here</a> )
	Utilising Spare Capacity in the Summer Months	28 October 2010, 16 February 2010 (click <a href="#">here</a> )

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](http://www.businessfitness.co.nz)).