



Practice Advancement Program

The Ideal Practice Part 1

Course Description

The Ideal Practice course will introduce you to Woodard's Ideal Practice Model™ which is comprised of 7 key areas of focus. The course is broken into 2 parts. In this first part, you will set the standard for your overall company Vision, Mission, and Purpose to guide you through building an Ideal Brand (You), identifying Ideal Services that foster higher-impact engagements, and creating a profile of Ideal Clients that are coachable and value-focused. You're building the foundation of your Ideal Practice.

Syllabus

Foundational Concepts - Setting the Stage for a High Functioning Practice

Session One – Woodard's Ideal Practice Model™

- Beginning with the End in Mind
- Explore the Path to Your Vision/Mission/Purpose
- Aligning your Business Vision with Your Story

Session Two – Ideal You

- Understand the Impact of a Strong, Clear Vision
- Explore the Path to Your Vision/Mission/Purpose
- Aligning your Business Vision with Your Story

Session Three – Ideal Services

- To review the current services you provide your clients and determine their nature, frequency and value
- To identify services you need to add to your deliverables and any required training and professional development needed to do so
- To identify services you need to stop providing because they do not align with your vision/mission/purpose and your long-term goals

Session Four – Ideal Clients

- To create an Ideal Client Profile
- To evaluate your current client base
- To curate your client base with a phased transition plan
- To maximize retention of your Ideal Clients

*This course is well-suited to accounting practices as well as client accounting service (CAS) divisions in regional CPA Firms.

**PREREQUISITES: None