WOODARD®

Practice Advancement Program

The Ideal Practice Part 2

Course Description

In part 1 of *The Ideal Practice* course you created a solid foundation for your Ideal Practice. You defined a Vision, Mission and Purpose that guided you to build an Ideal Brand (You), to identify Ideal Services that foster higher-impact engagements, and to create a profile of Ideal Clients that are coachable and value-focused. In this 2nd part of the course you will learn the final four key areas of Woodard's **Ideal Practice Model™**. You'll identify the gaps in each area and create a prioritized plan to build the practice you want.

Syllabus

Setting the Standard in Systems, Processes, Client Engagement, and Team Dynamics

Session One – Ideal Technology
- Conquering the Technology Challenge
- Inventory and Needs Assessment
- Vetting Techniques
- Team and Client Adoption

Session Two – Ideal Processes – Part 1
- Embracing the Power of Standardized Process
- Mechanics of Documenting Process
- Environment
- Accessibility

Session Three – Ideal Processes – Part 2
- Muscle Memory
- Linear Thinking
- Variables

Session Four – Ideal Engagement
- Defining Scope
- Right Pricing to your Value
- Risk Mitigation – Essential contractual topics
- Measuring Engagement Success

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Session Five – Ideal Team – Part 1

- Building the Ideal Team
- Types of Team Engagement
- Assessing Team Members against Practice Values and Goals

Session Six – Ideal Team – Part 2

- Building a High Functioning Team
- Defining the Roles in the Organization
- Next Steps – Building a 90-day Plan

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

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