FUTURE PROOF ACCOUNTANTS

BOOKKEEPING COACHING:

OUR BLUEPRINT TO CREATE A PROFITABLE PRACTICE

WHO
SHOULD DO THIS COURSE?

This course will detail all aspects of building a profitable bookkeeping practice. The course is ideal for the below people who want to add a bookkeeping arm to their practice.

Accountants *(Who currently run a Tax Practice)*	Who are wanting to grow their practice through adding a bookkeeping service to their practice.
Accountants *(Who don't have their own Tax Practice)*	Accountants who want to start their own bookkeeping practice.
People who hold Certificate 4 in Bookkeeping	Bookkeepers who want to take their bookkeeping to the next level by starting a profitable bookkeeping practice.
Experienced Bookkeepers	Who want to capitilise on their experience and turn it into a profitable practice.

COURSE DETAILS

This course is available live (starting Jan 2025) or self paced (available late Feb 2025). It will require a minimum 2 hours per week, for 4 weeks.

Each module contains:

- Comprehensive content
- Videos
- Workbooks
- References to Xero, XPM, Asana
- All the resources you need.

Once the course is completed, participants will receive a certificate which will include 8 CPD hours.

Participants will have access to the training materials for 12 months through the Future Proof Online Portal.

In this 3 minute video, Neha explains more detail about the course.

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COURSE

MODULES

1	Laying the Foundation for a Profitable Practice
2	Streamlining Systems for Maximum Efficiency and Automation
3	Strategic Pricing for Long-Term Profitability
4	Client Retention and Engagement
5	Optimising Processes for Scalable Growth
6	Marketing to Attract High-Value Clients
7	Building a Positive, People-Centered Practice
8	Client Advisory and Value-Added Services

ADVANCED INSIGHTS

1. Laying the Foundation for a Profitable Practice

Beyond identifying a niche, your focus should be creating a clear value proposition that sets your practice apart in a crowded market. For success, you need to define your unique selling points and ensure alignment with both market needs and personal strengths.

This module will help you:

- Define your unique value proposition and selling points.
- Align your practice with both market needs and personal strengths.
- Identify high-potential niches in the market.
- Set clear financial and growth goals.
- Build a brand that stands out in a crowded marketplace.

We will go over some worksheets to define your strong foundation - You don't need to know this yet. With the help of the lesson you will work this out.

ADVANCED SYSTEMS

2. Streamlining Systems for Maximum Efficiency and Automation

The more automation we have, the better! Dive deeper into integrating tools like Xero with complementary platforms like Asana for real-time project tracking and WorkflowMAX for advanced client management. Focus on automating back-end processes for scale and client transparency.

This module will cover:

- Integrating Xero with tools like XPM, Practice Ignition.
- Using Task Management systems
- Automating back-end processes
- How to implement real-time project tracking and automated client communication.
- How to enhance client transparency with automated updates and reports.
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We will go over several examples and ideas to ensure the systems are set up for efficient work place. The goal is to get the framework to create an ideal tech stack.

PROFIT FOCUS

3. Strategic Pricing for Long-Term Profitability

Move beyond basic pricing strategies. You need to be implementing tiered service offerings and value-based pricing to shift away from hours-billed models, ensuring high-profit margins while delivering tailored client value.

This module will cover:

- Billing cycle and style
- How to implement tiered service offerings to cater to different client segments.
- Setting high-margin pricing strategies for premium clients.
- How to deliver tailored pricing packages to match client-specific needs.
- How to ensure profitability by pricing based on client outcomes and perceived value.

We will go through how different scenarios might work for different types of clients and practices. The aim is to give you the framework to create an ideal way to price your clients for a strong working relationship and profitability. Yes we can achieve both and clients would love to pay you!

CUSTOMER SERVICE

4. Client Retention and Engagement

Engagement is key to building long-lasting client relationships that ensure stable revenue. This module provides strategies for creating positive client experiences that foster loyalty. We'll explore tools and communication techniques that keep clients engaged and satisfied over the long term.

Topics covered:

- Retention strategies
- Techniques for creating seamless, value-adding interactions that exceed expectations
- Implementing effective follow-up practices to nurture relationships and more.

GROWTH

5. Optimising Processes for Scalable Growth

Efficiency is the foundation of a profitable, scalable practice. This module focuses on building systems that not only streamline operations but also position your business for growth without compromising service quality or client satisfaction.

Topics Covered:

- Building scalable service models to handle growth with minimal overheads.
- Process automation strategies - from client onboarding to invoicing.
- Efficiency-driven workflows that enhance client experience and boost profitability.
- Monitoring KPI's to track operational success and areas for improvement
- Structuring teams and roles to optimise task allocation and maximise productivity.

MARKETING

6. Marketing to Attract High-Value Clients

Learn how to position your business as the go-to choice for high-value clients in need of professional bookkeeping services. This module will look at branding, outreach and networking strategies that attract clients who appreciate quality and are willing to pay for it.

Topics Covered:

- Crafting a brand that resonates with your target audience.
- Marketing channels and tactics for reaching high-value clients effectively.
- Leveraging networking and referral partnerships to expand your reach.
- Developing a content strategy that showcases your expertise and builds credibility.
- Conducting ongoing ROI checks to ensure the effectiveness of your marketing strategies.

STAFF

7. Building a Positive, People-Centered Practice

The heart of a successful practice is a dedicated, motivated team. This module emphasises creating a workplace culture where people are encouraged, valued and aligned with the company's vision, which ultimately drives growth and client satisfaction.

Topics Covered:

- Establishing a workplace culture that fosters positivity, growth and commitment
- Best practices for managing both in-office and remote team members. (Both in Australia and off shore)
- Aligning individual and team goals with business objectives to motivate performance.
- Promoting professional development to retain top talent and encourage loyalty.
- Developing leadership practices that inspire collaboration and innovation.

EXTRA SERVICES

8. Client Advisory and Value-Added Services

Move beyond compliance and bookkeeping services by offering advisory services that add strategic value for clients. This module will guide you in creating a higher-level service offering that positions you as a trusted partner in your client's business success.

Topics Covered:

- Transitioning from compliance-focused services to advisory roles that add value.
- Using data to offer actionable insights that support client decision-making.
- Developing service packages that highlight advisory benefits alongside bookkeeping.
- Techniques for turning clients into long-term partners through strategic advice.
- Expanding revenue streams by integrating high-level advisory services.

BEHIND THE SCENES

HALF DAY EXPERIENCE

For the first time, we are opening our business so you can see how a live bookkeeping practice runs.

Join us remotely while we:

- Run our daily meetings
- Allocate work
- Meet with our team members

You will also have the opportunity to:

- Meet with the Practice Manager
- Spend half an hour one on one with Neha

You will have pathway to ensure you get the most out of the session - Why would you miss it?

This opportunity would be perfect for someone who has not worked in a bookkeeping business at a management level previously.

This half day experience is open to course participants for an additional $750 (inc GST) and must be scheduled within 30 days of completing the course.

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ADDITIONAL

MODULES

These modules are available on demand as they are pre-recorded so you can watch at your own pace once you have completed the Blueprint course.

BAS Training *1.5 hour min*	Designed to provide in-depth knowledge of the BAS process, this module will equip participants with the skills to handle BAS preparations and submissions confidently, ensuring compliance and accuracy in financial reporting.
Payroll Training *1.5 hour min*	This module is essential for those looking to manage payroll efficiently and accurately. It covers all aspects of payroll processing, from setting up employee profiles to ensuring compliance with taxation and superannuation requirements.
Payables Training *1.5 hour min*	A module dedicated to mastering the accounts payable process, ideal for those who want to assist clients with the payables.
Reporting Advisory *1.5 hour min*	This module is designed for those who want to offer clients actionable insights through advanced financial reporting, going beyond basic compliance to add significant advisory value.

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BAS Training
(Optional Module - 1.5 hours)

Topics Covered:

- Understanding BAS Obligations: A comprehensive overview of BAS requirements, including GST, PAYG withholding, and PAYG installments.
- Preparing BAS Statements: Step-by-step guidance on gathering and validating information, calculating GST, and filling out BAS forms.
- Lodgement and Reporting: Insights into electronic BAS lodgement and best practices for timely submissions.
- Avoiding Common BAS Errors: Tips on recognising and rectifying frequent mistakes that can lead to audits or penalties.
- Practical Application with Xero: Using Xero's BAS tools to streamline preparation and manage recurring BAS tasks with ease.

Payroll Training
(Optional Module - 1.5 hours)

Topics Covered:

- Payroll Setup and Compliance: Setting up payroll systems that comply with ATO standards.
- Managing Employee Profiles: Efficiently setting up employee records, including personal details, tax information, and superannuation.
- Processing Payroll: Best practices for calculating wages, overtime, leave entitlements, and deductions.
- Single Touch Payroll (STP) Compliance: Overview of STP requirements, including timely reporting to the ATO and year-end processes.
- Automation in Payroll: Using Xero's payroll features to streamline processing and maintain accurate records while reducing manual entry.

Payables Training
(Optional Module - 1.5 hours)

Topics Covered:
- Setting Up Accounts Payable: Establishing payables processes, including setting up vendors, recording bills and automating due dates.
- Cash Flow Management: Techniques to manage cash flow effectively by prioritising and scheduling payments.
- Reconciliation and Accuracy: Ensuring accurate payment records through reconciliation practices and regular audits.
- Leveraging Technology: Using Xero and integrated tools for automated payable processing, approval workflows, and vendor communication. We will go over Dext, Hubdoc and Approval Max
- Compliance and Record-Keeping: Best practices for maintaining compliance with ATO record-keeping requirements and preparing for audits.

Reporting Advisory
(Optional Module - 1.5 hours)

Topics Covered:
- Customising Financial Reports: Tailoring reports in Xero to meet specific client needs, such as cash flow, profitability and key performance indicators (KPIs). We will touch on Spotlight and Fathom reporting as well.
- Analysing Financial Statements: Breaking down income statements, balance sheets, and cash flow statements to identify trends and areas for improvement.
- Presenting Insights to Clients: Techniques for translating financial data into meaningful insights that clients can act on.
- Building Advisory Packages: Developing packages that include regular reporting, forecasting and advisory services to enhance client engagement and retention.
- Leveraging Advanced Reporting Tools: Introduction to add-ons like Spotlight Reporting and Fathom for comprehensive, visually engaging reports that simplify complex data.

COURSE
PRICING

The cost of the course is $750 (inc GST) per participant.

Discounts will apply for multiple participants, contact us for details.

The Half Day experience is an additional $750 (inc GST)

The additional online modules are available at $250 (inc GST) each.

REVIEWS FROM PAST
CLIENTS

We have been running courses and webinars for years now with incredible feedback from our clients.

“I thought the video lessons were very helpful. I was able to follow along on Xero very easily while watching the videos. Often I had a question and the video would answer it in the next minute!”

Laura

★★★★★

“I thought the course was great. I felt supported by my instructor throughout the course. I am likely to recommend to a friend or colleague.”

Yared

★★★★★

“I felt supported during the course. I thought the course was good quality and informative.”

David

★★★★★

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ABOUT US

We are a team of accountants who help other accountants stay 'future proof' through training and coaching. With our industry constantly evolving, it is imperative to keep up to stay competitive.

Being a lifelong learner, our Director, Neha is passionate about accounting and education. After years of working in the accounting industry, Neha found a real gap between what accountants learn at university versus what practical skills they need in the workforce. This is when Future Proof Accountants was created.

After creating successful courses for graduate accountants, Future Proof Accountants moved on to developing an extensive suite of webinars and courses for all accountants wanting to upskill or refine their skills in their accounting systems. Neha also runs a successful bookkeeping practice, Sum and Substance Bookkeeping.

Neha Nayyar
Director
Future Proof Accountants

FOR MORE INFORMATION

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