

New Manager training (2 Day Program) – Day 1 of 2

Module	Description	CPD hours
1. Planning and designing effective assurance procedures	How to plan an efficient engagement and ensure all documentation meets the requirements of the Canadian Standards on Review Engagements 2400 and Canadian Auditing Standards.	2
2. Effective use of analytical procedures for engagements (including data analytics and data extraction software)	Understanding how to use analytical procedures effectively for both planning and evidence gathering. Understanding how to use data analytic tools and data extraction software to effectively identify/assess risk and gather evidence.	2
3. Project and time management	Understanding the project and time management challenges specific to CPA firms; using the latest research studies/tools to provide practical and easy to implement action steps to improve productivity. Includes budgeting and engagement management.	2
4. De-stress for success	Understanding the root causes of stress that negatively impacts our professional and personal health. Then providing researched based tools and techniques that can be implemented immediately to help address these stressors and improve your quality of life.	2
Total CPD hours Day 1 – 8.0 hours		

New Manager training – Day 2 of 2

Module	Description	CPD hours
1. Designing and delivering effective presentations	This module will focus on how to design effective presentations (such as audit committee and board of director presentations) with the purpose of providing your clients with clear action steps and strengthening the client relationship. We will also understand how to improve your presentation delivery including your preparation, confidence, voice and “being present”.	2
2. Providing and receiving effective feedback	This module uses the latest research in providing/receiving feedback to discuss how managers can mentor and develop their staff while also improving firm retention of top talent. This module will also address how to receive feedback top down to ensure that expectations are clear and that managers feel valued for contributions.	2
3. Leading and motivating effective teams	Understanding how to improve your team’s effectiveness and motivation using current research.	2
4. Business development and growing your professional network	Understanding how to identify business development opportunities for your firm and to grow your professional network.	2
Total CPD hours Day 2 – 8.0 hours		
Total CPD New Manager Training – 16 hours		