

CPA Firm Manager Leadership Skills (Certificate Program)

Format – Live Webinar

CPD Hours – Up to 20 hours (16 verifiable, 4 non-verifiable)

Ethics Hours – 2 hours

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Are you a new manager at a CPA Firm? Would you like to effectively lead your team? Do you need to refine your business development or project management skills? What about problem solving or decision making? These are all important skills as a manager and a leader especially at a CPA Firm in Alberta.

This eight-module leadership skills certificate program focuses on refining the necessary skills to lead your team effectively to success. The competencies that this certificate program focuses on are:

- Communicating with staff and partners
- Managing self
- Collaborating and leading
- Solving problems
- Acting ethically and demonstrating professional values

The eight modules that comprise this certificate program are:

Module 1: Leading Teams in a Hybrid Work Environment

Module 2: Project Management Tools and Techniques

Module 3: Managing your Managers and Partners

Module 4: Providing Effective Feedback to your Staff

Module 5: Business Development and Networking

Module 6: Creative Problem Solving

Module 7: Time Management Tools

Module 8: Professional Ethics for Managers

Upon completion of all eight modules, participants will receive the CPA Firm Manager Leadership Skills certificate.

Learning Objectives

- Identifying the challenges to leading hybrid teams and applying practical and research-based solutions to help overcome these challenges and lead your hybrid team to success.
- Identifying essential project management tools and demonstrating the use of project management tools to improve productivity
- Identifying the different types of communication styles of your partners and matching your method of communication to your partners
- Identifying the challenges facing managers in providing effective feedback to employees.
- Differentiating between effective feedback and ineffective feedback.
- Applying research-based tools to help managers provide effective feedback.
- Developing business development goals and demonstrating best practices for utilizing your network for business development
- Identifying the challenges to problem-solving and demonstrating the creative problem-solving approach
- Explaining a research-based approach to creative problem solving

- Identifying the challenges of managing our time in our current work environment
- Explaining time management tools and techniques and their application
- Identify ethical responsibilities as part of the CPA code of professional conduct
- Illustrating threats to ethical decision-making processes using case studies
- Demonstrating approaches to problem-solving that can help managers make ethical decisions.

Who Will Benefit

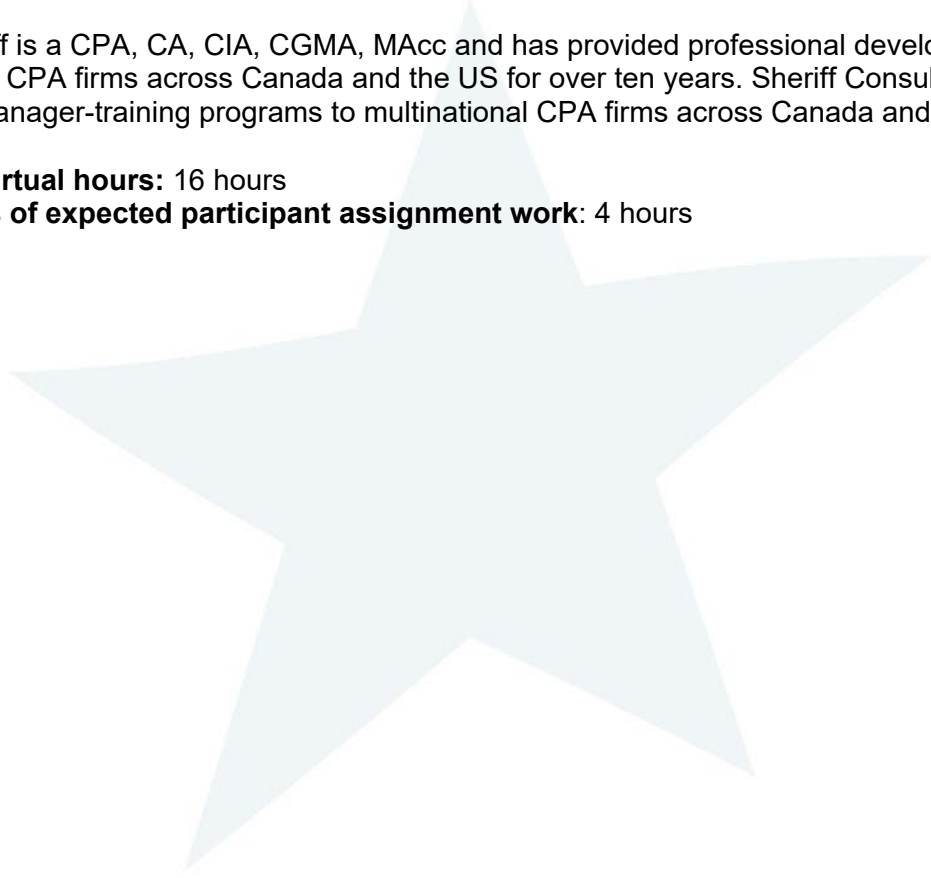
Professionals working in a CPA firm that are recent to the manager level position of the firm.

Instructor

Garth Sheriff is a CPA, CA, CIA, CGMA, MAcc and has provided professional development programs to CPA firms across Canada and the US for over ten years. Sheriff Consulting has delivered manager-training programs to multinational CPA firms across Canada and the US.

Total live virtual hours: 16 hours

Total hours of expected participant assignment work: 4 hours



Module 1: Leading Teams in a Hybrid Work Environment

Format – Live Webinar

CPD Hours – 2 hours

Ethics Hours - None

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Description

Our new normal of hybrid working has created both benefits and challenges to working within teams.

This webinar investigates the challenges of leading teams in a hybrid work environment along with providing solutions that can help you overcome these challenges to ensure your teams success.

Learning Objectives

- Defining a hybrid team and working environment
- Identifying the challenges to leading hybrid teams
- Applying practical and research-based solutions to help overcome these challenges and lead your hybrid team to success.

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Module 2: Project Management Tools and Techniques

Format – Live Webinar

CPD Hours – 2 hours

Ethics Hours - None

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Description

Are you looking to refine your project management skills?

Do your projects get off track?

Do you experience unintended outcomes?

Do you struggle to complete a project?

This webinar provides researched-based tools to help control, manage and complete projects.

Learning Objectives

- Defining project management
- Identifying essential project management tools
- Demonstrating the use of project management tools to improve productivity

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Module 3: Managing your Managers and Partners

Format – Live Webinar

CPD Hours – 2 hours

Ethics Hours - None

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Description

Have you had challenges within your team? Do you wonder how individuals within the team can be on separate pages? Are there times when teams are disharmonious? If you answered yes to any of these questions, it often is a result of communication challenges and team dynamics.

Managing those that supervise you can be challenging. Every person including partners within a CPA firm have different communication styles and preferences. This webinar will help you improve your harmonious team dynamic leading to higher employee engagement and retention.

Learning Objectives

- Listing the challenges of managing your partners
- Identifying the different types of communication styles of your partners
- Matching your method of communication to your partners

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Module 4: Providing Effective Feedback to your Staff

Format – Live Webinar

CPD Hours – 2 hours

Ethics Hours - None

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Description

Providing effective feedback has a direct and positive effect on employee engagement. The benefits of improving employee engagement within an organization are well supported, including:

- Higher employee retention
- Increased productivity
- Increased job satisfaction

This webinar will provide you with the tools to provide effective feedback to all within your team helping to build a team that is productive and team members who are satisfied with their contributions to your organizations goals.

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- Managing self
- Collaborating and leading
- Solving problems
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Learning Objectives

- Identifying the challenges facing managers in providing effective feedback to employees.
- Differentiating between effective feedback and ineffective feedback.
- Applying research-based tools to help managers provide effective feedback.

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Module 5: Business Development and Networking

Format – Live Webinar

CPD Hours – 2 hours

Ethics Hours - None

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Description

Business development is a challenge for many managers in terms of both expectations and execution. This webinar explores the concepts and tools for relationship building to help set the foundation for business development goals.

Learning Objectives

- Defining business development
- Developing business development goals
- Demonstrating best practices for utilizing your network for business development

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- Collaborating and leading
- Solving problems
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Module 6: Creative Problem Solving

Format – Live Webinar

CPD Hours – 2 hours

Ethics Hours - None

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Description

Innovation can lead to breakthrough ideas and operational excellence as a manager. However, 'outside the box' thinking is very challenging.

This webinar helps you to understand why creativity can be challenging and how to overcome these challenges with some tools and techniques for creative problem solving.

Learning Objectives

- Identifying the challenges to problem-solving
- Explaining a research-based approach to creative problem solving
- Demonstrating the creative problem-solving approach

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Module 7: Time Management Tools

Format – Live Webinar

CPD Hours – 2 hours

Ethics Hours - None

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Description

With the increasing demands for our time, including work (hybrid, remote and in-person) and family, sleep, along with the constant uncertainty of the future - finding time and energy to get things done is an increasing challenge.

This webinar will help you to understand the challenges that lead to time mismanagement and how select tools and techniques can help you overcome these challenges.

Learning Objectives

- Identifying the challenges of managing our time in our current work environment
- Explaining time management tools and techniques
- Applying time management tools and techniques

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Module 8: Professional Ethics for Managers

Format – Live Webinar

CPD Hours – 2 hours

Ethics Hours - None

Level – Introductory

Study Fields – Leadership, Employee Engagement, Retention

Description

Ethics is an important topic for all CPAs to understand including managers in CPA firms. Everyday routine, decision making, and project work has some type of ethical influence so it is important to understand what the impact ethics has on the you as a CPA and in your professional work within a CPA firm.

In this webinar, we will use case studies to apply specific areas of the CPA code of professional conduct ("code") to examine our ethical responsibilities and challenges within the CPA profession.

Learning Objectives

- Identifying our ethical responsibilities as part of the CPA code of professional conduct
- Illustrating threats to our ethical decision-making processes using case studies
- Demonstrating approaches to problem-solving that can help managers make ethical decisions.

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