

Course Descriptions

The iShade Learning™ courses teach world-class content that has already set the bar for excellence in the accounting industry as the backbone of leading professional development programs like *The Partner Institute™* and *The Leadership Summit™*.

Ethics (Part 1): The Role of You

This session takes a unique approach to discuss ethics in the accounting profession. We start with the most critical, and often the most neglected, element of moral decision-making, THE INDIVIDUAL. Once you have an idea of who YOU are morally, we explore the role you play as a leader in society. As a leader we discuss the obligation of ethical decision-making and you consider how you best contribute to this obligation. During the last part of the session we synthesize your self-reflection and the role of leadership with your state or organization's code of conduct. During this synthesis activity you will identify the direct impact you have to help uphold and support your profession's ethical obligation to yourself, to each other and to the public.

Timing: .5 day	Delivery method: Group/Live
Program level: Basic	CPE credits: 4
Field of study: Behavioral Ethics	Course #: FN001
Prerequisites: None	Competencies developed: Integrity
Pre-work: None	

Ethics (Part 2): Building Your Ethical Intelligence

This session is the second in a series of four and takes a unique approach to discuss ethics in the accounting profession. The focus is on the most critical, and often the most neglected, element of ethical decision-making, THE INDIVIDUAL. This session is designed to help the participant learn about his/her own current level of ethical intelligence and how to continuously develop it for effective decision making. During the session we review the ethical decision making process and how the brain morally matures. Primary focus is placed on the identification of the participant's moral compass and is later synthesized with the guiding principles of the Accounting profession. To promote future ethical decision making we provide the participant an overview of the current state of ethics in Corporate America and facilitate a discussion addressing the most common myths associated with ethical decision making.

Timing: .5 day	Delivery method: Group/Live
Program level: Basic/Update	CPE credits: 4
Field of study: Behavioral Ethics	Course #: FN002
Prerequisites: None	Competencies developed: Integrity
Pre-work: None	

7 Habits of Highly Effective People®

This intensive workshop provides accountants with a robust and tactical implementation plan to fully integrate The 7 Habits into their lives and their firms. The program is designed for individuals looking to become more effective people—regardless of position, or stage in life. Learn how to: improve focus, communication and balance; develop professional relationships for productive collaboration; increase productivity by focusing on what is most important; and reduce conflict.

Timing: 2 days	Delivery method: Group/Live
Program level: Basic	CPE credits: 16
Field of study: Personal Development	Course #: FN003
Prerequisites: None	Competencies developed: Adaptability; Integrity; Communication; Results oriented
Pre-work: Benchmark Survey (may be required); pre-workshop questionnaire	

FOCUS: Achieving Your Highest Priorities™

This engaging, one-day session is highly interactive and packed with learning. Ideal for accountants at all stages. Master the skills of planning your weeks and organizing your days so your time is spent on tasks that really matter. Learn how to clearly define your goals and break them down into key tasks while reducing stress by eliminating unnecessary activities.

Timing: 1 day	Delivery method: Group/Live
Program level: Basic	CPE credits: 8
Field of study: Personal Development	Course #: FN004
Prerequisites: None	Competencies developed: Accuracy; Integrity; Results Oriented
Pre-work: None	

Creating Customer Experience Owners™

Creating Customer Experience Owners™ is a service-skills training program designed to build customer loyalty by empowering employees to take ownership of the customer's experience. Participants learn how to: align their understanding with the customer's needs; resolve complaints and tough requests; and improve teamwork by focusing on customers. This highly interactive course appeals to everyone's learning style and will teach the art of going the extra mile for customers while improving both your professional and personal relationships.

Timing: 1 day	Delivery method: Group/Live
Program level: Basic	CPE credits: 8
Field of study: Marketing	Course #: FN005
Prerequisites: None	Competencies developed: Adaptability; Communication; Customer Focus and Professionalism
Pre-work: None	

Working Through Change

At this day and age the one constant is change. This course will help employees understand their personal reaction to change and how to identify action steps to help embrace and foster change. Understanding the realities of change and how your emotions and behaviors impact the success of change initiatives is the first step to ensuring a successful change implementation.

Timing: .5 day	Delivery method: Group/Live
Program level: Basic	CPE credits: 4
Field of study: Personal Development	Course #: FN006
Prerequisites: None	Competencies developed: Adaptability; Communication; Results Oriented
Pre-work: None	

Writing Advantage™

Many people spend hours each day attempting to express ideas and communicate important information in writing. Unfortunately, too much business writing today suffers from poor structure and muddled language. This course has been designed to help you make certain your ideas are clearly communicated—creating your own personal competitive advantage.

Timing: 1 day	Delivery method: Group/Live
Program level: Basic	CPE credits: 8
Field of study: Communications	Course #: FN007
Prerequisites: None	Competencies developed: Accuracy; Communication
Pre-work: Identify topics to use during workshop and bring examples of typical written communication	

Professional Staff Training: Level I

Ideal for staff members in their first year in public accounting, this course focuses on what CPA firm owners really expect staff accountants to be able to do. It develops an individual's workpaper preparation skills for audits, reviews and compilations. The course helps staff accountants: avoid major pitfalls that often waste time during their first year; develop better workpapers and workpaper techniques; and quickly become more productive and effective.

Timing: 3 days	Delivery method: Group/Live
Program level: Basic	CPE credits: 24
Field of study: Accounting and Auditing	Course #: PF001
Prerequisites: None	Competencies developed: Accuracy; Communication; Technical Skills; Results Oriented
Pre-work: None	

Professional Staff Training: Level II

Ideal for staff members in their second year in public accounting, this course improves the staff accountant's ability to handle varied assignments with less supervision and to produce quality financial statements on a timely basis. Training topics include: improving productivity on a typical assignment; employing practical analytical procedures; researching and solving technical accounting and disclosure issues; understanding Federal taxation and how it impacts the typical business client engagement; preparing reports, statements and footnotes; strengthening workpaper quality; improving writing and speaking skills; and enhancing speed and efficiency.

Timing: 3 days	Delivery method: Group/Live
Program level: Intermediate	CPE credits: 24
Field of study: Accounting and Auditing	Course #: PF002
Prerequisites: None	Competencies developed: Accuracy; Communication; Technical Skills; Results Oriented
Pre-work: None	

Professional Staff Training: Level III

Ideal for staff members in their third or fourth year in public accounting, this unique course stresses the role of senior (in-charge) accountants and provides tools they need to get engagements done on time and within budget. Major topics include: the role and responsibilities of the senior (in-charge); learning more about engagement planning and time management; supervising and training staff; reviewing and evaluating staff work; maintaining the quality of work; preparing workpapers, documentation and reporting issues; strengthening oral and written communication skills; promoting the firm's services; and strengthening client service and engagement profitability.

Timing: 3 days	Delivery method: Group/Live
Program level: Intermediate	CPE credits: 24
Field of study: Accounting, Auditing and Administrative Practice	Course #: PF003
Prerequisites: None	Competencies developed: Accuracy; Communication; Technical Skills; Results Oriented; Business Acumen; Knowledge of Products and Services; Business Development; Coach, Mentor and Develop
Pre-work: None	

Impeccable Networking and Mastering the Lost Art of Business Etiquette

If you are looking to expand your growth potential, this course will offer you the essential skills you need. You will learn to increase your current client database by networking in the most efficient and effective manner. During networking activities, a lack of manners and etiquette can be deadly... both to your reputation and to the bottom line of your firm. In this session, accountants learn the rules of formal etiquette and business etiquette, how to observe them meticulously, and how they have changed in light of technology developments, generational differences and diverse work environments.

Timing: 1 day	Delivery method: Group/Live
Program level: Basic	CPE credits: 8
Field of study: Marketing	Course #: PF004
Prerequisites: None	Competencies developed: Communication; Customer Service and Professionalism; Knowledge of Products and Services; Business Development
Pre-work: None	

Project Management: An Approach That Really Works™

Many firms face out-of-control costs brought on by projects that are full of changes, past deadline, over budget and require more resources than originally projected. After learning and applying FranklinCovey's Project Management process, participants will feel better prepared to effectively start, manage and complete their projects regardless of size, scope, budget or previous project management experience.

Timing:	1 day	Delivery method:	Group/Live
Program level:	Basic	CPE credits:	8
Field of study:	Management Advisory Services	Course #:	PF005
Prerequisites:	None	Competencies developed:	Accuracy; Communication; Results Oriented
Pre-work:	Identify project to use during workshop		

Presentation Advantage®

So much of business today is influenced by presentations. From internal employee presentations to high-profile sales deals, the ability to connect with your audience, powerfully make your point and motivate to action has never been more needed. Learn the skills to plan and design brilliant presentations and then deliver them with confidence.

Timing:	1 day	Delivery method:	Group/Live
Program level:	Basic	CPE credits:	8
Field of study:	Communications	Course #:	PF006
Prerequisites:	None	Competencies developed:	Communication; Customer Focus and Professionalism
Pre-work:	Identify presentation topic to use during workshop		

The Reluctant Salesperson: A Realistic Approach to Practice Development for the CPA

This workshop is designed to help accountants, regardless of their service or industry focus, become more comfortable, confident and skilled at developing and nurturing timeless business relationships. Participants build personal practice development plans based on their personal needs, desires and behavioral tendencies and leave with simple, practical tools and behaviors necessary for success and desired business development results.

Timing:	2 days	Delivery method:	Group/Live
Program level:	Basic	CPE credits:	16
Field of study:	Marketing	Course #:	PF007
Prerequisites:	None	Competencies developed:	Adaptability; Business Acumen; Knowledge of Products and Services; Business Development; Negotiate and Influence
Pre-work:	Complete DISC Profile and Business Development Questionnaire		

Customer Loyalty™

Winning Customer Loyalty is designed to help firm leaders measure and improve not just customer satisfaction, but true loyalty. Leaders will learn how to understand the connection between loyal customers and growth, how to measure customer loyalty through a Net Promoter Score and how to implement a powerful system for improving customer loyalty.

Timing:	.5 day	Delivery method:	Group/Live
Program level:	Intermediate	CPE credits:	4
Field of study:	Marketing	Course #:	MG001
Prerequisites:	None	Competencies developed:	Accuracy; Communication; Results Oriented
Pre-work:	None		

The Fundamentals of Value Pricing

Computer technology is reducing both the time an accountant spends on a task and the number of hours that can be billed to clients. A growing number of firms are starting to use value-pricing, which involves negotiating a fixed-price agreement at the outset of an engagement so accounting firms sell their expertise rather than their manpower. This course will provide you the key principles to continue this forward-thinking process in your firm.

Timing:	1 day	Delivery method:	Group/Live
Program level:	Intermediate	CPE credits:	7
Field of study:	Management Advisory Services/Marketing	Course #:	MG002
Prerequisites:	None	Competencies developed:	Communication; Results Orientated; Business Development; Negotiate and Influence
Pre-work:	None		

The Essentials of Managing Others

This workshop is ideal for individuals interested in developing the core skills necessary to manage the performance of others. Participants will learn the behaviors that make a "boss" most effective as well as what employees really want and need from a manager. In addition, this course focuses on providing practical tools for how to: set clear expectations, delegate with accountability, and give and receive feedback.

Timing:	1 day	Delivery method:	Group/Live
Program level:	Intermediate	CPE credits:	8
Field of study:	Personnel/HR	Course #:	MG003
Prerequisites:	None	Competencies developed:	Communication; Results Oriented; Negotiate and Influence; Coach, Mentor and Develop Others
Pre-work:	None		

Leading Across Generations™

Leading Across Generations will help the accountant to understand the differences between Baby Boomers, Gen Xers and Millennials. Participants will learn how to foster effective communication across different generations and how to improve the quality of results by leveraging the unique strengths of each generation. The program is also designed to teach the participants how to reduce conflicts by coaching team members to work well with co-workers from other generations.

Timing:	.5 day	Delivery method:	Group/Live
Program level:	Intermediate	CPE credits:	4
Field of study:	Personnel/HR	Course #:	MG004
Prerequisites:	None	Competencies developed:	Adaptability; Communication; Coach, Mentor and Develop Others
Pre-work:	Complete Generational Demographic Assessment		

Leadership: Great Leaders, Great Teams, Great Results™

This program is FranklinCovey's flagship leadership development program customized for the accounting industry. Learn to build trust and influence with others; define your team's purpose; create a strategic link between the work of the team and the goals of the firm; connect the work of your team to the firm's economic model; and align the four essential systems of execution to get the results you want as a leader.

Timing:	2 days	Delivery method:	Group/Live
Program level:	Intermediate	CPE credits:	16
Field of study:	Business Management & Organization	Course #:	TF001
Prerequisites:	None	Competencies developed:	Adaptability; Communication; Results Oriented; Business Acumen; Knowledge of Products and Services; Strategic Agility; Coach, Mentor and Develop Others
Pre-work:	Complete Leadership Quotient Assessment (LQ) and pre-program questionnaire		

Leading Through Change

Between mergers and acquisitions, competitive business markets and new technologies firms are quickly realizing that the one constant is change. Part of being a responsible driver of change is understanding both your responsibilities as a leader as well as the skills and attributes that are critical to the success of change initiatives. This course will give you the necessary tools to deal with your own and others' reactions to change and help you generate the required support and commitment to successfully implement change.

Timing: .5 day	Delivery method: Group/Live
Program level: Intermediate	CPE credits: 4
Field of study: Personnel/HR	Course #: TF002
Prerequisites: None	Competencies developed: Adaptability; Business Acumen; Strategic Agility
Pre-work: None	

Disciplined Marketing

Disciplined marketing is measurable and produces a tangible return on investment. Unfortunately, many accounting firms struggle with the practice development function because they have not "professionalized" their marketing infrastructure and activities. In this session participants are introduced to proven best practices that generate significant ROI in each of four disciplines: Client Development and Retention, Referral Opportunity Development and Management, Prospective Client Development and Supporting Activities.

Timing: .5 day	Delivery method: Group/Live
Program level: Basic	CPE credits: 4
Field of study: Marketing	Course #: TF003
Prerequisites: None	Competencies developed: Business Acumen; Knowledge of Products and Services; Business Development; Negotiate and Influence
Pre-work: Identify 1-2 strategic initiatives (projects) to use during the workshop	

The 4 Disciplines of Execution™

The 4 Disciplines of Execution work session helps accountants and accounting firms identify their highest priorities by separating the merely important from the wildly important. Each discipline taught in the course helps firms stay aligned to the true purpose of the firm. During this workshop participants create goals and measures relevant to the firm's priorities; develop skills to identify and execute critical work goals, create motivating scoreboards and apply personal accountability to produce results.

Timing: 1 day	Delivery method: Group/Live
Program level: Intermediate	CPE credits: 8
Field of study: Business Management and Organization	Course #: TF004
Prerequisites: None	Competencies developed: Communication; Results Oriented
Pre-work: None	