WOODARD™

The Ideal Practice

Standardize, Automate, Scale

Course Description

This course equips you through education, peer-to-peer collaboration, and hands-on exercises, to build the next version of your practice. During this journey, we will focus on several key areas that drive increased efficiencies, profitability, and client value.

Syllabus

Section One – Setting the Stage for a High Functioning Practice

- Session 1 –Beginning with the End in Mind: Why Invest in the Next Generation of Your Practice
- Session 2 – Ideal YOU: Defining Your Ideal Business
- Session 3 – Ideal Services Delivered to the Ideal Client at the Ideal Price

Section Two – Setting the Standard in Systems, Processes, and Client Services

- Session 4 – Ideal Technology: Conquering the Technology Challenge
- Session 5 – Ideal Business Processes: Embracing the Power of Standardized Process – Part 1 Mechanics, environment, accessibility
- Session 6 – Ideal Business Processes: Embracing the Power of Standardized Process – Part 2 Muscle memory, linear thinking, variables
- Session 7 – Ideal Engagement Part 1: Client Vetting, Client Discovery, Contractual Agreements
- Session 8 – Ideal Engagement Part 2: Pricing your engagement, Executing the Strategic Plan

Section Three – Building Adaptive Capacity for You and Your Team

- Session 9 – Ideal Team Part 1: Capacity Management – Building a Team
- Session 10 – Ideal Team Part 2: Capacity Management – Leveraging Shared Services, 90 day plan