Manager Coaching Program

Accelerate your career in public practice.

The Manager Coaching Program will help you:

- Develop a network of peers and experts
- Learn from real-life application
- Deepen your technical and professional knowledge

At this stage in your career, you likely have an intermediate foundation of technical knowledge. If you want to move forward on the partner track, you'll need to further develop these skills and many others. Over the course of this program, you will improve your skills in research, communication, engagement management and firm administrative responsibilities.

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Management doesn't come with a how-to guide.

The transition from the role of preparer to reviewer can be difficult. Not only is there a steep learning curve, you may also face changes in your partner's expectations of you. You're left learning by trial and error rather than following clearly communicated expectations and evaluations.

Our three-year Manager Coaching Program was developed for new managers. Designed with all learning styles in mind, the program incorporates an interactive mix of self-study, group discussions, technical lectures and real-life case studies.

Getting Started

We are currently accepting managers for this fall into Year 1 and Year 2 of the program. Here's what to expect in each year of the program:

Four video conferencing sessions from September to December.

Pre-reading and exercises for various sessions. These will be delivered three weeks prior to each session and are required to be submitted in advance of the session.

Classes held via Zoom.

The Program

Year	Topics
From Doer to Reviewer	• Transitioning into a managerial role and defining expectations • Engagement management and related workflow considerations • Introduction to practice management and related professoinal requirements • Conducting performance evaluations and providing feedback to staff • Tips and traps to identify tax compliance issues during file reviews
Behind the File Work	• The business of public accounting, providing initial insight into the operational side of a public practice • Marketing and social media and the consequence of both intentional and unintentional messaging • Managing staff and understanding the CPA student requirements as they relate to the firm • Consider privacy and anti-bully legislation as it relates to staff interactions including the querying process • Time management and how to prioritize decision making • Tips and traps to indentify tax planning opportunities, intergrating risk and ethical considerations
Moving Along the Partner Path	• Risk management and other professional requirements you need to know • Change management and how to lead a team to success • Appropriately identifying and handling workplace conflict • Future of the firm service model, identification of the skills necessary and building your own client base • Next steps in your career towards the partner path