

The Growth Partnership:

Increased Morale And Quantifiable Savings



Executive Summary

The Growth Partnership (TGP) teaches a variety of business improvement classes to more than 150 CPA firms all over the nation. The industry derives nearly all of its profit from projects accomplished for clients. Thus, it is imperative that accountants establish clear goals and measures of success with their clients before any project ever begins. *Project Management Essentials* for the Unofficial Project Manager (*PME*) graduates have reported increased realization of billable hours by 15% and others have revamped their communication patterns with clients resulting in better relationships.

Background

With so much time spent devoted directly to work for clients, TGP recognized how important it was that CPA's have a clear understanding of their client's expectations and timelines.

One firm TGP worked with recently stated that the tax department noticed other departments in their firm had great project management systems in place. They wanted that kind of

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“The Initiate piece has been a huge element for our CPA's students. They love the key stakeholder interviews and creating an alignment in expectations of all key players before a project ever takes off the ground,” said Amanda Garner of TGP. “We see our students changing the way they approach their clients by daring to engage them ahead of time to clarify expectations. When they get to the plan phase they have a clear and certain picture of exactly what their client wants.”

foundation and standards other departments had so they could crank up their performance. *PME's* structure was a good fit for their needs.

Implementation

The Project Management course is taught in a one-day format with 25 participants in each class. TGP flies to the location of the firms interested in receiving the course and teaches at a facility nearby. In 2013 the course was taught seven times, and in 2014 they have been contracted for 13 courses to date.

More than 300 accountants representing more than 150 firms have attended the course and the word keeps spreading.

Results

Feedback from students has been phenomenal. One *PME* graduate stated in one project they were able to improve realization of billable hours by 15%. What made this increase remarkable was they were training new staff as they completed the project.

The leading indicator for success at TGP is whether or not more people from each organization signed up for the course. Facilitators have reported that each time a partner attends a *PME* course, colleagues and friends sign up for next work session. Every time they teach they garner more interest in *PME*, and ultimately more attendees. Rave reviews from participants about project cost savings, clarified expectations, and overall improved project success has made *Project Management Essentials* for the Unofficial Project Manager a core offering at TGP. It is considered to be a glowing success.



Website

www.thegrowthpartnership.com

Industry

Business Consulting

Opportunity

Improve project management and understanding of client needs as well as an increase in billable hours and improved project timelines.

Solution

Project Management Essentials



The FranklinCovey All Access Pass® allows you to expand your reach, achieve your business objectives, and sustainably impact performance with unlimited access to FranklinCovey content. The pass comes complete with tools, assessments, videos, digital learning modules, and all of FranklinCovey's training courses—available Live-Online, On Demand, and Live In-Person.

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