



## CPD Series – Making Consultancy a Part of Accounting Services (April to June 2013)

Hong Kong Institute of CPAs presents this series for accountants between April 2013 and June 2013. This series of seminars is designed to provide the necessary business skills for consultancy and to build individual business models for the participants to grow and develop their practice. The speaker has updated all the materials in these re-run topics, taking into account the changes in financial, economic and social environments both in Hong Kong and China in the year 2013.

### Programmes

Date / Programme code	Time	Topic
Friday, 12 April 2013 (S130412AS)	6:30 p.m. – 9:30 p.m.	Mastering Consultancy Business Skills like IBM (re-run)
Thursday, 25 April 2013 (S130425S)	6:30 p.m. – 9:30 p.m.	Mastering “The McKinsey Way” Process (re-run)
Thursday, 16 May 2013 (S130516S)	6:30 p.m. – 9:30 p.m.	Managing a Consulting Project Better than Microsoft Project Management (re-run)
Monday, 20 May 2013 (S130520S)	6:30 p.m. – 9:30 p.m.	Mastering Business Analysis and Different Consulting Models (re-run)
Thursday, 23 May 2013 (S130523S)	6:30 p.m. – 9:30 p.m.	Writing Proposals, Deliverables and Reports to Maximise Corporate Benefits (re-run)
Thursday, 13 June 2013 (S130613S)	6:30 p.m. – 9:30 p.m.	Creating and Developing Your Consulting Business (re-run)
Wednesday, 26 June 2013 (S130626S)	6:30 p.m. – 9:30 p.m.	Understanding the Consultancy Market in China

<b>Venue</b>	Hong Kong Institute of CPAs, 27/F., Wu Chung House, 213 Queen’s Road East, Wanchai, Hong Kong.
<b>Format</b>	Seminar
<b>Language</b>	English
<b>Fee</b> (for each session)	HK\$430 for HKICPA member or student; and IA/ HKIAAT’s member or student HK\$420 for online enrolment HK\$700 for non-member
<b>Speakers</b>	<b>Dr. Agatha Fraser,</b> Adviser to Shenzhen Software Industry Association; Asian Pacific President of Business Skills DNA and Xsortal, resident columnist of Hong Kong Economic Journal Monthly <b>Dr. Sidney Sze,</b> Chairman of CAGI Think Tank and President of Society of Registered Financial Planners
<b>Participants</b>	Practising accountants doing consulting work; Practising management consultants; Management accountants; CEOs and CFOs; Project managers; Human resources managers
<b>Competency Rating</b>	Management accounting Intermediate to Advanced Level (Please refer to the Institute’s online CPD Learning Resource Centre)
<b>CPD hours</b>	3 (for each session)



## Speakers profile

### **Dr. Agatha Fraser (黃淑儀博士)**

Dr. Agatha Fraser is the residential author for Hong Kong Economic Journal (Monthly). In October 2010, she was appointed by the Shenzhen Software Industry Association as an honorary advisor; she has been the external advisor for the SME Committee for ACCA for more than 5 years. Her consulting years have never stopped since she was the post-doctoral research fellow (Think Tank) of Harvard University, John Kennedy School of Government. She was the Governor of City College, Manchester, UK till she retired.

Her multinational clients include HSBC; Modern Terminals; and Credit Suisse. She also spends her consultancy time for the SMEs, which is her mission. She has written books published in the USA and numerous articles in various journals in the US, UK, HK and China. She often is a keynote speaker in international forums in Europe, US, China and Hong Kong.

### **Dr. Sidney Sze**

Dr. Sze is the Founder President of the Society of Registered Financial Planners, the Founder Chairman of Independent Financial Advisors Association Limited & Founder Chairman of Canadian NLP Academy. He was a member of the CPD Advisory Panel of the Institute. His latest books include: 《禪·語·易·學之紡股說金》、《禪·語·易·學之快樂根源》、《全方位親子理財手冊》、《前藝·錢藝 為投資者把脈》、《擦亮投資眼》、《走出創富的迷思》、《財務策劃師專業考試Q&A》 and Q&A for Financial Planning Professional Examinations.

In October 2009, he spoke to 2,000 professional accountants in Kuala Lumpur, Malaysia on “Think Like a CEO – From Technical Excellence to Strategic Leadership Role”.

## About the programme

### S130412AS - Mastering Consultancy Business Skills like IBM (re-run)

Having a deep knowledge of business skills is the foundation to consultancy success. How do top consultancy firms such as IBM master the business of consulting?

Knowing what it takes helps to prepare for business meetings, identify clients' needs and wants and pinpoint the stages of business development. It gives consultants the power to present strategic views as well as tactical business moves, and secure lasting consulting contracts.

#### Objectives

- Build a profile of your unique individual skill strengths and weaknesses across 56 core business skills necessary for consulting
- Build a profile of your unique group skill strengths and weaknesses across 11 main groupings (Category, Stage and Character Type)
- Identify your main skill support strengths and weaknesses across 8 different factors (Business Support and Team Support within the company and your clients' organisation or factory)
- Prepare a Career or Business Threat Summary, which will explain the main threats to your career or business progress across 6 main forces
- Understand which teams you can best fit into to advance your accountancy career through a Consulting Team Matching analysis
- Know what kind of training will be most beneficial to your career or business development through a Training Needs analysis
- Improve your skill level and career or business development over the next 12 months through a Progress Manager Session

### S130425S - Mastering "The McKinsey Way" Process (re-run)

"The McKinsey Way" is a road map: it guides accountants from the start to finish in a consulting process.

This seminar starts to uncover "the McKinsey Way", learning the tricks and tools used by the experts. "The McKinsey Way" opens ones' consulting horizon by using the "never sell, but clients buy" philosophy which would enhance a consultant's position in client's organisation.

Each step of consulting process is identified. Securing each step with clear deliverables will help accountants to assure client confidence and trust.

#### Objectives

- Learn how to do business research
- Understand the best practice of expert consulting
- Master the consulting approach and structure
- Identify the actual business problem
- Develop and build the appropriate business solution
- Conduct interviews and manage data and information
- Master selling the solution with data, charts and diagrams

### S130516S - Managing a Consulting Project Better than Microsoft Project Management (re-run)

Managing a consulting project is more than just project management. It incorporates team selection, either internal or external team members, and it includes change management and mind set focus.

This seminar examines the latest techniques, tools, business models and structures in managing consulting projects. Participants will be given insights into the project management process, tools, techniques, timelines, responsibilities and risk identification. Nothing is worse than a failed consulting project. A project will be considered a failure by the client if it cannot produce sustainable business outcomes.

#### Objectives

- Understand how a consulting project works
- Become familiar with all the components of managing a consulting project
- Learn how change management works
- Calculate team selection criteria and critical success factors
- Master the project management process and techniques
- Assess project risk and manage it
- Prepare change management and sustainability
- Balance company cultures and structures with the sustainable benefits of the project

### **S130520S - Mastering Business Analysis and Different Consulting Models (re-run)**

In analysing a business, there are many consulting models: some are very common and some are rarely used.

A consultant need not mention what type of model, or a combination of models that he/she uses to diagnose business problems, but they are essential to help consultants to master the work flow and direction in pinpointing problems. In short, in analysing a business and implementation, there are seven functions: planning, organising, leading, coordinating, controlling, staffing and motivating.

Any MBA graduate may come across these functions, but as a consultant, it is the implementation, monitoring and review that count.

In this seminar, we will grasp and extract the best consulting models such as: Theory of Constraints, Porter Five Forces Model, McKinsey7S, Six Sigma, Boston Consulting Group Matrix, and 7 PEST Analysis Model etc.

#### **Objectives**

- Master the analytical tools used in consulting
- Gain a broad and in-depth comprehension of business organisation and problems
- Use tools and models in uncovering the real problems in a business
- Learn the key skills in implementation
- Learn the diagnosis and be able to present to clients in understandable terms

### **S130523S - Writing Proposals, Deliverables and Reports to Maximise Corporate Benefits (re-run)**

Writing proposals, deliverables and reports is an art as well as a science. Many fail to write clearly, simply, and comprehensively. Fanciful words and jargons get you nowhere. Many consultants confuse clients by putting in sophisticated words and meaningless models that clients cannot understand.

This seminar provides participants with the highest skills in writing proposals – “you never sell a proposal, you present and client's buy-in”. A sharing of sample proposals is also the key. Client business audit helps accountant consultants to look at the business other than from an accounting perspective. Followed by an initial report that helps clients to understand his/her business.

Then, once agreed with the client, a proposal is presented. Structure is the foundation for a successful proposal; deliverables have to be clearly described and concrete and here is where the client sees the real benefits. Reports have to relate to the client's industry and stage of development.

#### **Objectives**

- Acquire the skills of a client Business Skills DNA Audit before writing a proposal
- Differentiate a proposal from one that will confuse a client to one that focuses on a client's wants and needs
- Learn the terms and phrases that stimulate and motivate clients to change
- Master proposal writing and report presentation
- Recognise what are deliverables and what are processes
- Master the common deliverables to common business problems
- Learn how to write reports with flow charts, data etc
- Learn how best to present solutions and reports

### **S130613S - Creating and Developing Your Consulting Business (re-run)**

The current top 10 consulting businesses rank with accountancy as the top, followed by advertising, auditing, business marketing, business writing such as Corporate Social Responsibility (CSR) reports, career counseling, communication within an organisation such as intranet and new media, computer consulting such as ERP implementation and web 2.0 or 3.0, editorial services such as annual company reports, executive search such as interim CEO.

This seminar is to help those accountants and professionals who want to master the consulting business. It starts with knowledge and self knowledge. It helps to define the work scope with the apparent restraints that accountants face and maps out the path for a consulting business.

#### **Objectives**

- Learn how to package the accountant's services as a provider of consultancy services
- Create the framework within the practice
- Learn how to leverage the current client base
- Know what to know on business
- Master business intelligence and networking
- Be aware of the current guidelines on consulting and professional liability

## S130626S - Understanding the Consultancy Market in China

The consultancy business is relatively new in China when compared to other parts of the world. Areas often focus on preparing companies or corporations for initial public offering (IPO) rather than different aspects of business productivity and efficiency.

Companies are looking to gain competitive advantage by using social media for marketing, different indices to understand business trends and intelligence, and business dashboards to manage their business. Professional accountants have to equip themselves in order to suit the demands from the China market.

### **Objectives**

- Understand the consultancy market in China
- Understand who the main players are
- Learn other areas of focus besides IPO
- Learn common fees structure in China market
- Identify the risks in entering consultancy market in China
- Identify what the necessary resources are
- Recognize the roadblocks to entry

You will learn the skills necessary for dealing with the Chinese consultancy market, the mindset to deal with Chinese enterprises, and the management of the international behaviour of some Chinese corporations.



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**Deadline: 7 working days before the date of the programme**

No.	Membership		Full Name of Participant(s) (Block Letters)	Company	Email address <sup>*(2)</sup> (Block Letters)	Programme Code	Fee (HK\$)	
	No.	Status (1)						
1								
2								
3								
4								
<i>* Email address is for enrolment confirmation purpose. Please refer to note (2) for details.</i>							Total (HK\$)	

I am unemployed and not working. I am planning to rejoin the workforce.  
 The Institute reserves the right to allocate places to enable the enjoyment of more members in this event.  
 The Institute's decision is final. Applicant must submit the enrolment form 10 working days before the event.

Contact Person : \_\_\_\_\_ Tel No. : \_\_\_\_\_ Fax No. : \_\_\_\_\_ E-mail : \_\_\_\_\_

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<input type="checkbox"/> Cheque (no. _____) payable to "Hong Kong Institute of Certified Public Accountants" or "HKICPA"	
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- Membership Status: **NP** = Non-Practising, **P** = Practising, **IA** = International Affiliate, **S** = Student, **HKIAAT** = HKIAAT Student or Member, **GAA** = GAA Passport holder, **NM** = Non-Member.
  - Successful applicants will receive confirmation of registration by email at least 3 working days before the event. Unsuccessful applicants will also be notified around the same time. If you have not heard from the Institute regarding your registration 2 working days before the event and if you have other enquiries related to the programme, please make enquiry at 2287 7386 or 2287 7253.
  - NO ADMISSION TICKET will be issued. Please bring your HKICPA membership card or confirmation email for admission purpose.
  - All applications are on a first-come-first-served basis.
  - Application by fax will ONLY be accepted when payment is made by credit card. Please ensure all the particulars relating to payment are completed, otherwise the application cannot be processed. There is NO need to send in the enrolment form again if it has already been faxed to the Institute.
  - Cheque(s) should be made payable to "Hong Kong Institute of Certified Public Accountants". Please issue SEPARATE CHEQUE for each event.
  - NO REFUND/CANCELLATION will be entertained after the application is processed. If you are unable to attend the enrolled programme, you may nominate a substitute to take your place, provided that the Institute is notified in writing at least two working days prior to the event date.
  - All scheduled events will be cancelled and postponed to a date to be announced in the event of typhoon signal no. 8 or above or if a Black Rainstorm warning is hoisted. For details of bad weather arrangement for CPD programmes, please refer to the Institute's homepage.
  - The Institute reserves the right to change the venue, date, speaker or to cancel the event due to unforeseen circumstances.
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