Progress Lite
Course Outline

Mastering the Annual Progress Meeting

Overview:

This webinar teaches accounting professionals how to transform traditional year-end meetings into high-value Progress Sessions that prevent client complaints and generate revenue.

Delivery Method

Webinar (90 Minutes)

Target Audience

Owners, Partners, Senior Accountants, Junior Accountants, and Client Service Managers.

Prerequisites and Requirements

Current Progress or Starter Bundle Subscription.
A basic understanding of accounting practice operations.

What does this course cover?

In this Getting Started module, you will learn how to:

- **Identify the Problem:** Why traditional year-end meetings fail and create client risk.
- **Value Communication:** The 5 types of value clients recognize and how to demonstrate them.
- **System Overview:** Complete walkthrough of the Annual Progress Meeting System.
- **Implementation Process:** Review an 8-step workflow from setup to follow-up.
- **Team Roles:** Review how to assign responsibilities across your practice team.
- **Pricing Strategy:** Discuss how to charge per meeting with confidence.
- **Templates & Tools:** Ready-to-use emails, agendas, and report formats.
- **Success Metrics:** How to measure and scale your Progress Meeting program.

Benefits of completing this learning module

By completing this course, you will master the **Annual Progress Meeting System** and transform low-value compliance meetings into premium advisory sessions that clients than you for.

You'll learn how to proactively communicate value to clients and prevent blame while building strong relationships that generate potential referrals and eliminate fee objections.