



Profit from Penman

Differentiate Better Client Retention Unique Simple Affordable New Clients

The Credit Management Accountant Syllabus

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| <ol style="list-style-type: none"> 1. Welcome - A Paradigm Shift in Accountancy 2. Wake-Up 3. Candidate Assessment CMA I <ol style="list-style-type: none"> 4. Open Session - Review Answers CMA I 5. Filing - the lessons to be learned <ol style="list-style-type: none"> 6. Firm 1 7. Firm 2 8. Your Firm 9. Filing Late 10. Filing on 10 Months 11. Filing Strategy 12. Filing Early - a killer 13. AI Client Profile Analysis Report <ol style="list-style-type: none"> 14. Why your clients fail? 15. Why are 60% of your clients rated RED? 16. Who does the rating? 17. Our Objective - 60% Green 18. Increase Billing 19. Bring Forward Billing 20. The Filing Check List - never assume again 21. Vendor Vetting - who cares or who cares wins! 22. CRO 4.6 Million - Risk Assessment 23. Not a True & Fair View 24. BT has more rights than an SME! - Window Dressing or Marketing <ol style="list-style-type: none"> 25. The Directors Report 26. The Business Review 27. Full Accounts 28. Abbreviated Accounts <ol style="list-style-type: none"> 29. Why put in a current liability when its not! 30. Dividends 31. Accruals | <ol style="list-style-type: none"> 31. The Optimised Process <ol style="list-style-type: none"> 32. Review Company Status - Equifax / Riskdisk 33. Assess Needs & Direction 34. Prepare Accounts 35. File & Confirm 36. Proof Positive PO 37. Reassess Company Status & Communicate 38. Equifax <ol style="list-style-type: none"> 39. Analyse this? Company A, B, C, D. 40. The Analysts View - what do they want to see 41. What ratios do they use 42. Analysis 43. Credit Limit Setting Process <ol style="list-style-type: none"> 44. Turnover Method 45. Average Credit Method 46. Shareholders Funds Based 47. Credit Gearing 48. Shareholders Funds 49. Current Ratio 50. Liquidity Ratio 51. Gearing 52. Turnover 53. Profits 54. County Court Judgments 55. Accountancy Improval Support <ol style="list-style-type: none"> 56. GIF 57. Intelligence 58. Corporate Hi-Jacking Protect 59. Competitor Reports 60. Training Manual |
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