

Practice Management

Purpose: The purpose of this course is to provide the skill and knowledge necessary to establish and manage a successful financial practice or small to medium enterprise.

Course content

- » Establishing and defining vision, mission and values
- » Strategic and business planning
- » How businesses operate
- » Marketing and marketing plans
- » Financial management for small Business
- » Business risk management
- » Succession planning

Learning outcomes:

On successful completion of this course, learners will be able to:

- » define vision, mission and values
- » identify the key elements of an effective business plan
- » describe how businesses operate and appropriate business structures
- » evaluate and manage the financial needs and performance of a small to medium enterprise
- » establish business operational systems and processes
- » apply effective business management techniques
- » effectively manage staff and the human resource requirements of a business
- » develop and implement marketing strategies through an effective marketing plan
- » implement a risk management and succession plan
- » develop and implement a comprehensive business plan

Delivery methods:

This course is designed to be delivered through a combination of individual study and in a classroom/workshop format led by an experienced facilitator. This course is also available and fully supported through the Adviserlink distance learning programme.

This course is approved by the New Zealand Qualifications Authority under the provisions of the Education Act 1989, and Adviserlink Learning Ltd is accredited to teach it.

Assessment:

Assessment for Classroom option:

Assessment	% of Overall Assessment
Pre-course assignment – readings and short answer questions	10%
Post-course assignment – case study: Comprehensive business plan	40%
2-hour closed book examination	50%

Assessment for Distance learning option:

Assessment	% of Overall Assessment
Assignment 1 – short answer and scenario based questions	5%
Assignment 2 – short answer and scenario based questions	5%
Assignment 3 – case study: Comprehensive business plan	40%
2-hour closed book examination	50%

Pre requisite/s:

Open entry

Dates of course/s:

Registrations for distance learners are accepted at any time throughout the year. Please refer to the course calendar on our website www.adviserlink.co.nz for the date/s and location of our classroom options.

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