



CASE STUDY

Customized Professional Development Curriculum Creation and Design for Multiple Levels of Experience

INTRODUCTION

The learning and development group at a multinational tax consulting firm had found great success with their in-house technical training programs. Recently, the group wanted to take on an ambitious challenge—to upskill their professionals to be highly capable client relationship managers, in addition to

being technically proficient advisors. The firm reached out to several training vendors and consultants for one-off professional development training classes but quickly realized a more thorough soft skills curriculum would be required to achieve their goals.

The firm needed a professional development curriculum that would identify the strengths and weaknesses of each manager and provide development opportunities responsive to those needs.

THE CHALLENGE

The firm's rich history and culture focused on serving clients in a responsive, personalized manner, which had been passed down informally from mentor to mentee. Over time, as the firm grew, it became more challenging to achieve the desired consistency and high level of skill solely through informal development. Therefore, the firm began searching for an outside consultant who could help grow their professionals into strong communicators and teach them to effectively manage client relationships to the firm's high standards.

To provide the high level of client service so key to their culture, the firm needed a professional development curriculum that would identify the strengths and weaknesses of each manager and provide development opportunities responsive to those needs. Their aim was to create a consistent high-end client experience year-over-year and across all of their locations.



THE SOLUTION

What began as a concept of a specialized course for experienced managers quickly evolved.

"We understood early on that this training was not just about teaching professionals people skills, but training them in relationship management based on the firm's culture," shared 20-20 President Jessica Sacchetti. "To do that, we realized that we needed to partner with the firm's in-house learning team to develop a program that would truly move the needle."

The firm was looking for training that played to the strengths and weaknesses of each participant in order to create a consistent client experience throughout the world. Leadership wanted to ensure each manager performed to high standards with regard to:

- **Effective communications**
- **Structured time management**
- **Well-orchestrated project management**
- **Developing productive teams**
- **Ability to gather and deliver meaningful, constructive feedback**

The result was a highly customized experienced-manager training program that was so successful the firm came back to 20-20 to design a new-manager training program, and subsequently a new program for senior staff. The 20-20 team continues to work closely with the firm's learning professionals, who identify the competencies they want at each level and help design the specialized programs to meet the identified needs. This year, the firm will also offer 20-20-developed soft-skills training to new hires and junior staff, and to its class of over 350 summer interns. Those courses will be added to a customized multilevel professional development curriculum that now includes over a dozen courses. **The curriculum, while focused specifically on professionals in the accounting industry, was designed to be cross-functional so that it can be delivered to audit, tax, and HR professionals.**



THE RESULTS

What started with one program intended to build client relationship skills to a firm’s cultural standard of excellence has now grown to a variety of courses in a multilevel curriculum. The curriculum is designed to develop professionals to be effective client relationship managers from the beginning of their careers throughout their careers with the firm.

The demand for soft skills continues to grow and in just a few short years has rapidly become one of 20-20 Services’ fastest-growing divisions—not only addressing the needs of the more senior established staff, but preemptively enriching emerging talent early on in their careers.

In a time when so much back-office number-crunching and return preparation can be so easily offshored, the people skills of your client-facing professionals can be a huge differentiator for your firm. To learn more about how 20-20 can help to improve client management skills on your team, [contact us today](#).



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