TEAM
ACCOUNTING

3-YEAR CURRICULUM GUIDE

Accounting & Tax Professional Incubation Program

A NOTE ON THIS DOCUMENT

This guide sets out the current structure of the Team Accounting 3-year incubation curriculum, for practitioners and applicants to download and reference. Team Accounting reviews the curriculum regularly and may update, reorder, or change modules to reflect regulatory changes, industry developments, and ongoing improvements to the program. This document does not form part of a binding agreement — the version published on teamaccounting.co.za is always the most current, and practitioners will be notified directly of any material changes affecting their own cohort.

Each program year is delivered in four quarterly modules combining group workshops, one-on-one mentorship, and practical work on real client files. Technical accuracy is built first; business, sales, and marketing capability is layered in progressively so practitioners are never asked to sell before they can deliver, or to deliver without learning how to sell.

Delivery Format (applies across all 3 years)

- Monthly group workshops — technical updates, business-skills training, peer learning.
- Fortnightly one-on-one mentorship sessions with an assigned senior mentor.
- Practical, supervised work on live client files (not simulations only).
- Quarterly written assessment + practical file review by Team Accounting's quality team.
- Access to a shared resource library: templates, checklists, SARS/compliance guides, scripts.

YEAR 1 · FOUNDATION

Building the Practitioner

Focus: technical competence, delivery quality, and professional habits. Team Accounting supplies the majority of clients so practitioners can concentrate on learning to deliver well before learning to sell.

Q1 — Onboarding & Systems

Getting set up to deliver reliably from day one

- Team Accounting systems: practice management software, document workflows, file structure
- Professional conduct, independence, and ethics refresher (SAICA/SAIPA/SAIT standards)
- Client onboarding process: engagement letters, FICA/KYC, scope-of-work agreements
- Communication basics: tone, response times, expectation-setting with clients

Q2 — Core Technical Service Delivery

Doing the compliance work to a consistent, reviewable standard

- Monthly bookkeeping standards and reconciliation discipline
- VAT, income tax, and provisional tax return workflows
- SARS eFiling, correspondence, and dispute/query handling basics
- Payroll fundamentals: PAYE, UIF, SDL, and payslip administration
- Client business — business formation, registrations, and compliance pillars

Q3 — Client Experience & Quality Control

Turning technical work into a dependable client experience

- Managing client expectations and deadlines without overpromising
- Internal quality-review checklist before work leaves your desk
- Handling difficult conversations: late payments, missing records, bad news
- Introduction to pricing: understanding what your time and work are worth

Q4 — Foundations of Business Awareness

Starting to see the practice as a business, not just a job

- Reading your own numbers: fees earned, fees owed, personal cash flow
- Basic marketing concepts: what a value proposition and referral actually are
- Professional networking etiquette and building your first referral relationships
- Year 1 review: technical sign-off, feedback session, Year 2 goal-setting

YEAR-END MILESTONE

Technical competency sign-off across bookkeeping, VAT, income tax, and payroll; a documented client-communication track record; and an individual Year 2 development plan agreed with your mentor.

YEAR 2 · GROWTH

Building the Business

Focus: client acquisition, pricing, and practice operations. Clients are now a 50/50 mix of Team Accounting referrals and self-sourced work — mentorship shifts from technical correction to business coaching.

Q1 — Sales & Client Acquisition

Learning to bring in your own clients, not just serve the ones you're given

- Lead generation basics: where small business clients actually come from
- Sales conversations: qualifying a prospect and converting a consultation into a client
- Pricing strategy: packages, fixed fees vs. hourly, and avoiding under-pricing
- Building your personal professional brand within the Team Accounting network

Q2 — Marketing Fundamentals

Becoming visible to the clients looking for you

- Setting up and maintaining a Google Business Profile and LinkedIn presence
- Simple content marketing: sharing useful, non-technical tax/accounting tips
- Building referral partnerships with attorneys, bankers, and business consultants
- Local networking: business chambers, community groups, industry associations

Q3 — Practice Operations

Handling more clients without dropping quality

- Scaling delivery capacity: workflow tools, deadlines, and capacity planning
- Introduction to using junior support or outsourced capacity for overflow work
- Advanced tax topics: basic tax planning and entity structuring conversations
- Technology stack review: what to add as your client base grows

Q4 — Financial Management of Your Practice

Running your practice like the business it now is

- Practice profitability: tracking margin per client, not just total billings
- Cash flow management and reinvestment planning for your own business
- Advanced client relationship management: retention and upselling services
- Mid-program review: performance against Year 2 goals, planning for Year 3

YEAR-END MILESTONE

A demonstrated ability to convert leads into paying clients, a documented pricing structure, and a practice showing positive month-on-month profitability, reviewed against your Year 2 goals.

YEAR 3 · INDEPENDENCE

Building the Brand

Focus: advisory depth, leverage, and market positioning. The majority of clients are now self-sourced; Team Accounting's role shifts to referral partner, brand licensor, and community.

Q1 — Advanced Advisory Skills

Moving beyond compliance into higher-value advice

- Introductory CFO-style advisory: budgeting, forecasting, management accounts
- Business advisory conversations beyond tax and compliance
- Exploring an industry specialisation (e.g. retail, medical practices, construction)
- Pricing advisory services separately from compliance work

Q2 — Scaling & Leverage

Growing capacity without growing your own hours

- Hiring, delegating, and managing your first team member or contractor
- Systemising the practice so quality doesn't depend only on you
- Automating repetitive work with practice management technology
- Becoming a peer mentor to incoming Year 1 practitioners

Q3 — Brand & Market Positioning

Becoming known in your own right, not only through referrals

- Building your own market presence and reputation
- Basic thought-leadership: talks, articles, or local media opportunities
- Winning larger or more complex clients
- Negotiation skills for fees, contracts, and partnerships

Q4 — Graduation & Transition Planning

Defining what comes after month 36

- Transitioning to the post-program affiliate/licensing arrangement
- Long-term business planning: 3–5 year goals for your independent practice
- Joining the Team Accounting alumni and referral network
- Graduation review and formal sign-off

YEAR-END MILESTONE

A self-sustaining practice with a majority self-sourced client base, a documented growth plan for years 4 and beyond, and formal graduation into the Team Accounting affiliate network.

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