PATHWAY TO PRACTICE

7 Days Residential Training Programme for COP Applicants

An Initiative by:
Committee for Members in Practice

Programme Overview

The 7-Day Residential Training Programme is meticulously designed to provide aspiring practitioners with the necessary tools, knowledge, and strategies to build a successful career in the ever-evolving domain of Chartered Accountancy. This program offers an immersive learning experience, combining expert-led sessions, interactive workshops, and networking opportunities.

Programme Objectives

The primary objectives of the training program are:

Career Pathways in Practice	Regulatory Awareness	Professional Networking
Equip participants with knowledge about evolving career options, new areas of practice, and emerging trends in the accounting profession.	Enable participants to understand the impact of regulations on the audit profession, ensuring preparedness for regulatory challenges.	Facilitate a networking platform for participants to connect with peers and build collaborative relationships that are beneficial for practice growth.

This training program is a testament to ICAI's unwavering commitment to nurturing the next generation of practicing Chartered Accountants. By providing a strong foundation of knowledge, skills, and peer connections, it empowers new COP holders to build successful practices and become trusted advisors. This initiative is designed to inspire participants and prepare them for enduring success in their professional journey.

CA. Charanjot Singh Nanda
President, ICAI

This initiative goes beyond learning—it aims to create a vibrant ecosystem for collective growth. The 7-day Residential Training Program gives new COP holders the opportunity to connect with peers, share insights, and form relationships that will help them overcome the challenges of practice. By emphasizing meaningful networking, the program equips participants to build strong professional ties and use those connections to achieve lasting success.

CA. Prasanna Kumar D
Vice President, ICAI

Whether you're looking to explore innovative career pathways, stay updated with regulatory frameworks, or build a professional network, this training program serves as a transformative platform for future-ready practitioners.

Eligibility

Members who have successfully applied for their Certificate of Practice (COP) for the first time and paid the applicable fees, on an after 1st January 2025.

Please note that Registration for the training must be done within twelve months of successful submission of the COP application and fee. The training operates on a first-come, first-served basis and must be completed within six months of applying for COP.

Training Highlights

Practice Management Insights Learn to start and manage a CA practice, acquire clients, handle relationships, manage finances, and navigate audits, tenders, and the business environment effectively	**Values, Ethics & Attitudinal Orientation** Covers values and attitude, fostering integrity, empathy, resilience, humility, and ethical courage for professional growth.
Interactive Workshop Practical use case of Data analysis Practical training on AI Tools	**Pitch yourself** Interactive Sessions Formation of the groups and assignment of the tasks
Strategic Planning for Setting up your Firm Choosing the Right Practice Model Choosing the Right Networking & Merger Model	**Professionalism and Ethics** Adherence to the Code of Ethics Client Engagement Quality control processes within an accounting firm
Understanding ICAI Regulations & Regulatory forms Introduction of ICAI Committees of relevance for Practicing Members and various resources which are available for professional development	**ICAI Practice Management Software** **Hands on training** Intensive Training on the Practice Management Software provided free of cost to the members in Practice
Practical training on Accounting & Audit tools Learn the effective use of Audit and Accounting Software	**Professional Opportunities** Overview of niche areas such as forensic accounting, risk management, fraud detection etc. Opportunities in diversifying your practice
Important Audit findings and case studies findings Interactive sessions & Discussions of Case Studies through Slido & Group Discussions etc.	**Your Practice RoadMap** Presentations from each Participant Creation of My Network from amongst the Peers

This initiative is designed to spark collaboration and cultivate strong professional alliances. It provides members with the guidance and resources to develop large, competitive Indian CA firms capable of excelling on the world stage. Through a well-structured curriculum that highlights best practices in partnership building, the program empowers participants to innovate, grow, and set new standards of excellence in the profession."

CA. Madhukar Narayan Hiregange
Chairman, Committee for Members in Practice

Programme Structure of the 7 days Residential Training Program for New COP Applicants

DAY 1 - Getting Started with Practice

A. **Introduction to the Course**
B. **Know your Peers**
C. **How to start the CA practice**

- Understanding Business Environment

D. **Compliance Vs Consultancy Positioning with Expectations**
   (Defining the Group)

E. **Practice Mindset:**

- Identifying Personal Strengths through Self-Assessment
- Inner Readiness
- Professional Mindset Development: From Employee to Entrepreneur
- Preparing for the Long Haul: Vision, Values, and Purpose
- Must Have and Essential Skills Set for Practice.

F. **Choosing the Right Practice Model**

- Various types of practice models
- Which practice model is right for me?
- Partnership Agreements - Dos and Don'ts
- Issues to consider when structuring or restructuring a firm
- Family members working in the firm
- Remuneration and profit-sharing models

G. **Choosing the Right Networking & Merger Model**

- Types of Networking & Merger
- ICAI Networking guidelines
- Advantages and disadvantages of Network & Merger alliances

DAY 2 - Values, Ethics & Attitudinal Orientation: Practicing with Purpose

A. **Framework of 12 Foundational Traits Caselets based approach)**

- **Honesty:** The bedrock of professional character
- **Empathy:** Understanding the human element beyond numbers
- **Quality:** Non-negotiable standards for excellence
- **Excellence:** Transcending compliance to inspire
- **Versatility:** Thriving amidst transformation
- **Vulnerability:** The strength of authentic leadership
- **Gratitude:** Acknowledging the journey and the people
- **Punctuality:** Honor in time-bound delivery
- **Resilience:** Powering through adversity
- **Humility:** Staying grounded while soaring high
- **Courage:** Ethical leadership in the face of pressure
- **Trust & Cooperation:** Unity for sustainable growth

Case Studies
Ethical Dilemmas: Roleplay & Resolution Techniques

Professionalism and ethics (Case studies)
- **Session A**: ICAI Code of Ethics – Principles and Practice
  - Conflict scenarios
  - Real-life ethics dilemmas – Group Exercise
  - Advertisement Guidelines, Do's & Don'ts
- **Session B**: Oversight Mechanisms & Risk Preparedness
  - Role of NFRA, SEBI, FRRB, CAG, ED, CBI
  - QRB and implications for small/mid-size firms
  - Case Law-based Learning

Through this initiative, ICAI reinforces its dedication to empowering practicing members with accessible, world-class training. The program blends insightful expert sessions, real-world case studies, and dynamic networking opportunities to deliver meaningful, practical benefits at an affordable cost. It is designed to strengthen the profession's foundation and advance India's standing as a global hub for accountancy excellence.

CA. Satish Kumar Gupta
Vice Chairman, Committee for Members in Practice

DAY 3 - E. CRM

- How to get a First Client
- Client Relationship Management
- Understanding client needs and expectations
- Handling difficult clients and resolving conflicts professionally

Setting Up Infrastructure
- Physical Vs Virtual
- Resources
- Equity Partnership (Consulting)
- Hiring
- Financial Planning

A. Embracing the technology Practice with Technology
- Setting up a Tech-Ready Practice: Hardware, Software, Security, Systems, Servers, Backup, Cloud adoption, Confidentiality
- Data Management
- Productivity Tools including CMP Benefits

B. Practice Management Software

DAY 4 - Practice Firms and ICAI Regulations

C. Generative AI for Practice
D. Data Analysis skills st for Practice

A. Important Regulations & Regulatory forms related tp Practice Managemnet
- Firm Name Approval
- Registered Office and Branches
- Firm Constitution & Changes
- Article Assistants & Related Regulations
- Other Staff (Paid Assistants, Employee CAs etc.)

- Part time practice / employment
- Other Business Engagement & Related Regulations

B. Types of Empanelments (MEF, CAG, IBA, SEBI, RBI, SFIO etc.)

C. Participation in Tenders and Related Norms

D. Minimum recommendatory scale of fees

E. UDIN

F. Peer Review Process

DAY 5 - Show case of Tools with Case Study

A. Case Study
- Spread Sheet tool (Macros)
- ETL Tools
- Visualization Tools
- Data Base
- Cloud
- Power Tools (Power BI,Power Query)
- Buiklding bots

B. 360° Compliance using Audit Tools - Acceptance to Reporting
- Client Engagement
- Engagement Process: Steps for engaging clients
- Review and Re-engagement: Periodic review and continuation of client engagements
- Managing Disengagement: Proper procedures for ending client engagements
- Quality control processes within an accounting firm
- Objective of quality control
- Benefits of an effective quality control system
- General principles of quality control
- Quality control elements

DAY 6 - Professional Opportunities & ICAI Committees

A. Traditional Areas

- Audit
- Taxation
- Corporate Law

B. Non Traditional Areas

- GST Litigation
- Accounting Outsourcing
- Forensic Audits
- Social Audits
- IS & Cyber Security Audits
- ASM Audits

- RERA Super Consultant
- MSME Super Consultant
- Custom and FTP
- FEMA
- Insurance Survey (Loss Assets)

- Resolution Professional & Liquidation
- Valuation
- ESG Audits

C. Outsourcing

- LPOs
- KPOs

- ADR(Arbitration,Mediation & Conciliation)
- Due Diligence
- Virtual CFO Service

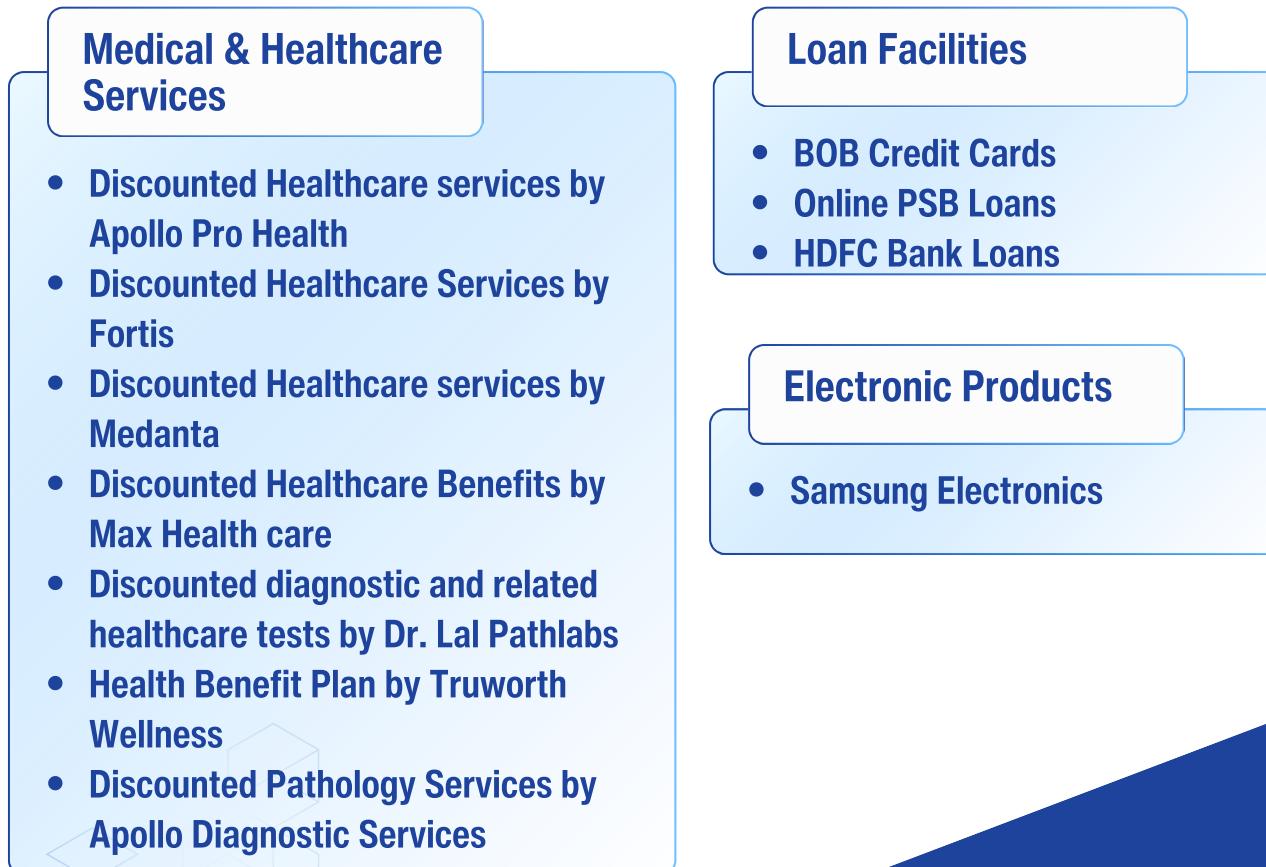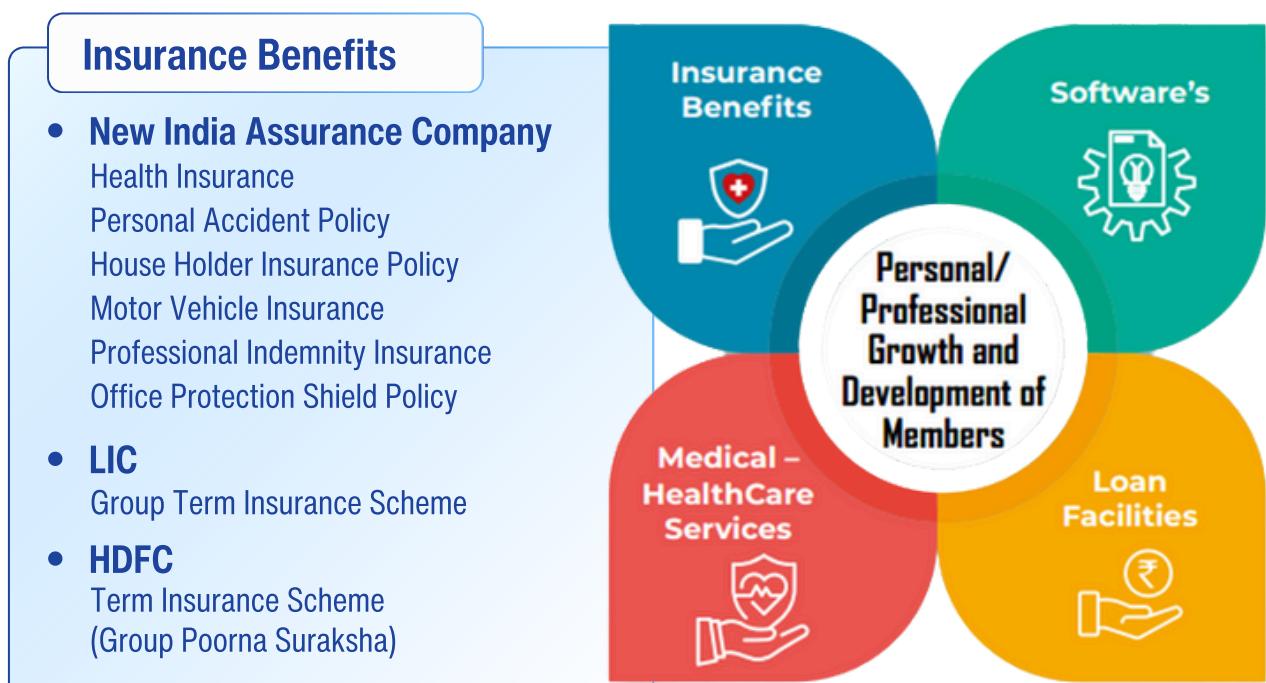**D. Introduction of ICAI Committees**

- Certification Courses
- Diplomas
- MOUs / MRAs

DAY 7 - Practice Road Map - Presentation Session

A. Group Presentation - 50 Participants in 10 Groups (5 in each group)

Capacity Building of Members in Practice and CA Firms - Tie ups with various entities for Personal/Professional Growth and Development of Members

Insurance Benefits

- **New India Assurance Company**
  Health Insurance
  Personal Accident Policy
  House Holder Insurance Policy
  Motor Vehicle Insurance
  Professional Indemnity Insurance
  Office Protection Shield Policy

- **LIC**
  Group Term Insurance Scheme

- **HDFC**
  Term Insurance Scheme
  (Group Poorna Suraksha)

Insurance Benefits

Software's

Personal/ Professional Growth and Development of Members

Medical – HealthCare Services

Loan Facilities

Medical & Healthcare Services

- **Discounted Healthcare services by Apollo Pro Health**
- **Discounted Healthcare Services by Fortis**
- **Discounted Healthcare services by Medanta**
- **Discounted Healthcare Benefits by Max Health care**
- **Discounted diagnostic and related healthcare tests by Dr. Lal Pathlabs**
- **Health Benefit Plan by Truworth Wellness**
- **Discounted Pathology Services by Apollo Diagnostic Services**

Loan Facilities

- **BOB Credit Cards**
- **Online PSB Loans**
- **HDFC Bank Loans**

Electronic Products

- **Samsung Electronics**

Practice Management Software for CA Practitioners & CA Firms
An Advanced Practice Management Software to Enhance Operational Efficiency

(Free of Cost for Members of ICAI)

Weblink: https://cacloud.ca.in/

Practice Management Modules

- Document Management
- Task Management
- Account Management

Create a connected Client Experience with Advanced Practice Management Modules

- Client Management
- Employee Management
- Communication Management

Other Softwares

- AnyAudit
- Tally Software
- Zoho Software's
- QuickHeal Antivirus
- Billing and Accounting App- Fynone
- Billing Software- My Bill Book
- Click2Confirm - App for Balance Communication
- Easyoffice Income Tax, TDS, Audit e-filing, CMA & GST Return Filing Software
- GST Audit Software -Bill Mantra
- GST Software by SPEQTA
- GST, TDS Software by KDK
- Accu Reco: Cloud-based GST ITC Reconciliation Tool

- Access to NeSL IU for Audit
- Razorpay X Payroll and Banking Plus Platform
- SAG Infotech- GST Software
- Simplify Practice Management Software
- Accounting & Audit Automation Tool – Suvit
- TDS Software - TDSMAN
- White-Label Appointment Management and Online Consultancy Platform - MyMeet.io
- WrapTax- Digital Confirmation/Reconciliation Software
- Access to Probe42 Platform
- Cloud Based Ecosystem
- VIDUR AI Assistant for Tax, Accounting and Corporate Laws

For Further details visit the website of CMP Benefits @ https://cmpbenefits.icai.org/

COMMITTEE COMPOSITION

CA. Charanjot Singh Nanda
President, ICAI

CA. Prasanna Kumar D
Vice- President, ICAI

CA. Madhukar Narayan Hiregange
Chairman, CMP

CA. Satish Kumar Gupta
Vice Chairman, CMP

CA. Jay Chhaira
CCM, ICAI

CA. Piyush Sohanrajji Chhajed
CCM, ICAI

CA. Chandrashekar Vasant Chitale
CCM, ICAI

CA. Durgesh Kabra
CCM, ICAI

CA. Purushottamlal Khandelwal
CCM, ICAI

CA. Mangesh Pandurang Kinare
CCM, ICAI

CA. Priti Savla
CCM, ICAI

CA. Umesh Ramnarayan Sharma
CCM, ICAI

CA. Babu Abraham Kallivayalil
CCM, ICAI

CA. Dayaniwas Sharma
CCM, ICAI

CA. Rajendra Kumar P
CCM, ICAI

CA. Ravi Kumar Patwa
CCM, ICAI

CA. Sanjib Sanghi
CCM, ICAI

CA. (Dr.) Rohit Ruwatia
CMP, ICAI

CA. Abhay Kumar Chhajed
CCM, ICAI

CA. (Dr.) Anuj Goyal
CCM, ICAI

CA. Gyan Chandra Misra
CCM, ICAI

CA. Sanjay Kumar Agarwal
CCM, ICAI

CA. Hans Raj Chugh
CCM, ICAI

CA. Pramod Jain
CCM, ICAI

CA. Rajesh Sharma
CCM, ICAI

CA. (Dr.) Sanjeev Kumar Singhal
CCM, ICAI

Shri Manoj Kumar Sahu
Govt. Nominee, ICAI

Co-opted Members

CA. Rakesh Kumar Singhal   CA. Ajay Kumar Alipura   CA. Satish Shivajirao Dakare   CA. Prashant Kanakrai Upadhyay

CA. Devinder Kumar Singla   CA. Harsh Parsottam Raithatha   CA. Udhwani Mahesh Arjandas   CA. Mohit Gupta

CA. Prashanth GS

Special Invitee

CA. Pankaj Chadha   CA. Narapareddy Brahma Chaitanya Reddy   CA. Ram Deepak Heda   CA. Alok Shiromany   CA. Sunil Kumar Rastogi

CA. Deepak Nagpal   CA. Krunal Ashokbhai Brahmbhatt   CA. Karanjeet Singh   CA. Pradeep Tyagi   CA. Ajay Kumar Jain

ICAI Centre of Excellence

Located in the historic cities of Jaipur and Hyderabad, the centers boast world-class infrastructure designed to support excellence in teaching, research, consulting, and other professional endeavors. The campus fosters a vibrant sense of community life, complemented by recreational amenities for various sports and activities.

Accommodation will be provided on a twin-sharing basis in well-furnished residential blocks located in the campus. The serene academic environment, coupled with lush green surroundings, creates an ideal setting for focused study, reflection, personal growth and learning.

FEES

₹7000 + GST (18%) which will include the charges for stay & course fees
(on twin sharing basis)

Duration of Programme - 7 Days Residential programme

HOW TO REGISTER

For Registration please visit 🌐
https://www.icai.org/post/cmp-pathway-to-practice
(*Batch commencement is subject to requisite number of registration on first come first served basis)
For any Clarifications,
please feel free to contact Committee for members in Practice at Mobile No.
📞 **9015845015, 8755555733, 9810887871** or write us at **cmp@icai.in** ✉

REGISTER