



HKICPA seminar: **Customer Profit Hacking – Risk-reward Analysis and the Impact of Credit Risk**

Program Code: SCPD17082201

In this seminar, the speakers will give a short overview of the Customer Profit Hacking method and then go deeper into the importance of risk-reward analysis of a customer portfolio and how to apply that in the Hong Kong business environment. Good health is vital for a good life. This is also true for companies. The health of a client's customers can be an important indication of the future health of that client. How to measure the financial healthiness or creditworthiness of a client's customer portfolio and what possible methods are available to avoid potential damage? What can be the role of a CPA and how can he/she help clients in the process of staying financially healthy?

In this seminar, the speakers will explore how consultative services of CPAs can add value to a client's business by analyzing the financial health of that client's customer portfolio and how to mitigate financial risks. Topics include:

- How often should a CPA check the health of a client's customer portfolio?
- How can a CPA add value to the knowledge of his clients and their customers?
- What is the practice to check the financial health of a customer portfolio?
- How should a CPA quantify the results of a financial health check?

After joining this seminar, participants will:

- Have a good understanding of the added value of financial health checks for a client's customers
- Know whether such a service could be beneficial for their own firm to generate new revenue streams
- Get practical models to perform the customer portfolio risk/reward analysis
- Get inspired by ideas and concepts both from the East and the West

Date **Tuesday, 22 August 2017**

Time **7:00 p.m. – 9:00 p.m.**

Venue Hong Kong Institute of CPAs,
27/F., Wu Chung House, 213 Queen's Road East, Wanchai, Hong Kong

Format Seminar

Language English

Fee HKICPA member or student: HK\$190 (online enrolment: HK\$180)
IA/ HKIAAT member or student: HK\$190
Non-member: HK\$330

Speakers **Mr. Marcel Wiedenbrugge**, Managing Director, WCMConsult
Mr. Alexander Lo, Entrepreneur and author of Happy Customers Faster Cash HK, Taiwan, China
(Speakers' profiles are printed overleaf)

Participants CEOs; CFOs; CMOs; Sales or marketing managers; Financial managers; CPAs; Entrepreneurs;
Business owners

Competency* Industry knowledge; Management, leadership and soft skills

Rating* Foundation level

CPD hours 2

* Please refer to the [Institute's online CPD Learning Resource Centre](#) for descriptions of competency and rating.

About the speakers

Mr. Marcel Wiedenbrugge, Managing Director, WCMConsult

Mr. Wiedenbrugge is managing director of WCMConsult. He combines knowledge and more than 25 years of experience in account management/ sales, credit management, service management and related software solutions. He is an entrepreneur, speaker, writer, researcher, trainer and consultant. He is the author of several books, including Happy Customers Faster Cash and Customer Profit Hacking.

Mr. Alexander Lo, Entrepreneur and author of Happy Customers Faster Cash HK, Taiwan, China

Mr. Lo has over 25 years of experience in Business Information Management and Information Technology. Previously, he has held leadership positions in the world's leading Business Information providers, including Managing Director of Thomson Reuters Asia, and General Manager of Dun & Bradstreet (D&B), Hong Kong and Taiwan.



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