

# Closing the value gap

## masterclass

### The programme

10am – 4pm

Coffee and registration 9.30 – 10am

#### The client journey and onboarding experience

- Your ideal client – less is more
- Designing and marketing your customer journey
- Linking your customer journey to your value ladder
- Creating a first-class onboarding experience
- The Proactive Accounting Meeting as the first step

#### Levelling up your Annual Accounts Review (AAR) Meeting

- The value in the AAR Meeting
- Current industry practice
- Best practice delivery
- Positioning the next step on the value ladder – a paid meeting
- Getting clients to commit to the AAR Meeting

Lunch 12.10 – 1.10pm

#### The Value Gap

- Using The Value Gap Calculator
- Closing the Gap – tactics to improve profit and cashflow

#### The Cashflow & Profit Improvement Meeting (CPIM)

- Preparing for the meeting
- Session delivery and post session follow up
- Identifying improvement potential
- Positioning tactics to deliver better cashflow & profit
- Selling the CPIM by de-risking the cost
- Selling the service – common pathways

#### The Risk Management Meeting

- The value in helping clients to mitigate risk
- Using the Risk Register tool with clients (and on your firm)
- The Risk Management Meeting process
- Selling the service – common pathways

Ends at 4pm

Sponsored by:



# THE.GAP

Advisory, made easy.

Thurs, 29 June 2023

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8 Eastcheap,  
London EC3M 1AE



This workshop qualifies for  
5 verifiable CPD hours

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