

Advisory, made easy.

workshop

The programme

10am – 3pm

————— Coffee and registration 9.30 – 10am

The foundations for advisory success

- Linking your services with your core purpose
- Your required advisory mindsets
- Show me the value

What your clients want

- The three freedoms
- Linking your services to clients' pain points
- Demonstrating improved profitability and cashflow
- The three essential services that businesses deserve – now more than ever

Marketing and selling

- Marketing made simple – education that softly sells
- Your most effective sales tool – the Value Gap Calculator

————— Lunch 12pm – 1pm

Leveraging the Annual Accounts Review Meeting

- Your five essential client meetings
- The purpose and value of the Annual Accounts Review Meeting
- Identifying value add opportunities from the Annual Accounts

Building a recurring revenue stream

- New clients and their onboarding experience
- Re-engaging existing clients in advisory services
- Building your value ladder
- Getting a 300% plus ROI from The Gap
- Support available

————— Ends at 3pm

Sponsored by:



THE.GAP

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Thurs, 9 November 2023

Novotel Auckland Airport,
Ray Emery Drive,
Auckland



This workshop qualifies for
4 verifiable CPD hours

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