

# Advisory, made easy

## A new masterclass

### The programme

10am – 4pm

Coffee and registration 9.30 – 10am

#### Get what you want from your business

- Your business purpose under the spotlight
- Build the business and life you want
- Pro-active mindset – you get to choose
- Close your own value gap

#### Client onboarding

- The prospective client meeting
- Pre-qualification tactics – avoid the dross
- Essential client pre-work
- Your 'best practice in business messaging'
- Transitioning clients from compliance to advisory

#### The value gap analysis report

- How to use the value gap calculator
- Leveraging the value gap analysis report
- Marketing the report to engage new & existing clients
- Making the report the star in clients' annual accounts

#### The annual accounts review meeting

- Best practice PPF (Past, present & future)
- A revised process that engages clients and adds value
- Delegating to the team to release capacity
- Re-engaging clients in the annual accounts review meeting

Lunch 12pm – 1pm

#### Value gap workshop

- Cashflow & profit mindsets you need to know
- Annual accounts example – workshopped

#### The improvement meeting

- Leveraging the value gap analysis report
- Strategies versus tactics to improve profit and cashflow
- Pricing and selling the improvement meeting
- Best practice delivery

#### Scale

- The 'easy advisory' client value ladder
- Engaging your team to free you up for high-value services
- Digital marketing must do's
- Gap content and education support to scale
- Your plan and next steps

Ends at 4pm

# THE.GAP

Thursday, 16 May 2024

Novotel Auckland Airport,  
Ray Emery Drive,  
Auckland



Brought to you by:



This workshop qualifies for  
**5 verifiable CPD hours**

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