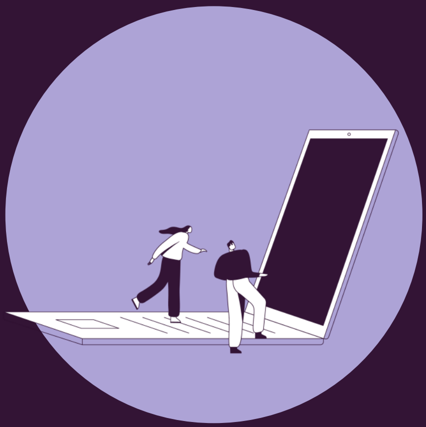
The LEAP Programme



The 6-week programme for CPAs looking to learn the essential skills and processes to build an advisory business.

This programme is delivered with the generous support of our strategic partners, Xero, Fathom and The Back Room.

Advisory, made easy.

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Register

Why we developed this programme

There is much rhetoric in the accounting industry about the importance of advisory yet little detail on the 'how to'. Accounting firms know they need to deliver these services but experience real roadblocks that prevent implementation.

There's also a disconnect between accountants and their SME clients. On one hand, accountants struggle to articulate the tangible nature and value of advisory to clients. On the other hand, SMEs need help to run a better business, yet aren't asking for these services.

The LEAP Programme is designed to help close this gap between accountants and their clients, address the barriers to delivering advisory and provide the practical 'how to' in a systemised, efficient, and leveraged way.

What you'll receive

Participants take part in six weekly online sessions presented by The Gap. Each 90-minute session is delivered by facilitators with extensive experience in the business advisory space.

Participants complete detailed pre-work for each session to ensure they receive maximum value from the programme, address their specific challenges, and get runs on the board.

With access to a dedicated Gap Member Success Specialist and the full range of Gap tools, you'll develop your Advisory Implementation Plan as you progress through the programme.

Programme Objectives

1. Understand and be able to articulate the benefits of advisory and increase client demand.
2. Learn how to market, sell, and deliver the three essential advisory services.
3. Address the common barriers to delivering advisory (no time, no confidence, no system).
4. Develop a rock-solid plan to implement advisory.
5. Fast-track a recurring revenue stream.

Participation is limited to 20 firms per programme.

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Programme sessions

Session 1:
The Onboarding Meeting

LEARNING OUTCOMES:

- Understand client selection fundamentals
- Reposition advisory as the main course
- Discover what a customer-centric onboarding experience looks like
- Learn how to free up capacity to deliver
- Discover follow-up steps to increase conversion

Session 2:
The Annual Accounts Review Meeting

LEARNING OUTCOMES:

- Learn how to leverage your team to scale your business faster, with less stress
- Articulate the value you've already provided
- Realise the value-add opportunities from the Annual Accounts
- Discover the insights that will get your clients excited about the future of their business

Session 3:
The Improvement Meeting

LEARNING OUTCOMES:

- Understand how to deliver a Cashflow & Profit Improvement Meeting
- Unlock clients' time, mind, and money freedom
- Learn how to demonstrate a high return on client spend – and the value of accountability coaching
- Be able to naturally position the forecast during an improvement meeting
- Learn how to build your Advisory value ladder

Session 4:
The annual Business Plan

LEARNING OUTCOMES:

- Understand your role as facilitator
- Discover why pre-work is essential
- Understand how to facilitate the 4-hour planning session
- Be able to confidently build the one-page plan
- Discover how to make planning an annually recurring revenue stream

Session 5:
The Coaching & Accountability Meeting

LEARNING OUTCOMES:

- Understand your role as coach
- Discover how pre-work enables your client to do the heavy lifting and go deeper in the session
- Learn how to link ongoing reporting with coaching
- Take a deep dive into the coaching process

Session 6:
Marketing, selling and implementation

LEARNING OUTCOMES:

- Learn how to seamlessly deliver education marketing
- Fine tune your webinar and seminar delivery
- Discover three essential sales techniques
- Understand how to sell without product pushing
- Complete your plan with Gap support

Who should join a LEAP Programme?

The Programme is for Accounting and Bookkeeping firms looking to start their advisory journey or wanting to better integrate advisory services into their service offering.

Programme details

Your investment includes:

- Enrolment for two participants
- Subscription to The Gap for the duration of the programme
- Up to 15 CPD hours for each participant

Contact:

Our next LEAP Programme is commencing on Wednesday, 17th January 2024. Please contact Florian Herrmann to be added to the waitlist.

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Programme pricing: $2,495 per firm
* Less Xero sponsorship $750
* Less Fathom sponsorship $375
* Less The Back Room sponsorship $375
Net investment per firm: $995

All prices are in Canadian dollars and exclude sales tax.

Ready to take the LEAP?

Register

Advisory, made easy.