Services Expansion Program

Foundations of Client Advisory: Discovery and Design Services

Course Description

This course lays out the fundamental components of a successful client advisory engagement. You will learn to effectively engage business owners on how they operate their businesses from discovering their pressing issues, goals, and priorities, through the design, planning and execution of a strategic plan. By building your confidence and creating a structured approach to guide your clients to success, you will move beyond the transactional bookkeeping role and into the role of a highly valued resource for your clients.

Syllabus

Section One – Discover, Plan, Execute

Session 1 – Introduction to the Foundations of Advisory

- Beginning with the End in Mind: Why add client advisory to your services?
- Defining the Terminology
- Fundamentals of Advisory
- Creating a "Stop Doing List" for YOU

Session 2 – Fundamentals of Client Discovery

- Creating the Safe-Zone / Gaining Trust
- Listening to what is said (and what is not said)
- Setting up your discovery template

Session 3 –Discovery Phase

- Documenting your Client's High-level Objectives and Goals
- Identifying big rocks (objectives) and low hanging fruit
- Introducing the Parking Lot
- Pain Points and Priorities
- Creating a "Stop Doing List" for the client
- Creating a "Immediate Action List"

Session 4 – Planning & Organizing Phase

- Defining Key Results for each Identified Objective
- Defining Project-Level Activities for each Key Result
- Building a Report of Findings
- Organizing results into a Strategic Plan

Session 5 –Execution Phase

- Executing the Plan through pre-scheduled Recurring Business Meetings
- Strategies for execution: Delegation, Objective Ambassadors, Accountability
- Monitoring Success Along the Way -Key Measurements

Session 6 – Key Components of an Effective Value Proposition Presentation

- Presenting a Phased Approach
- Defining "Wealth" or benefit to the client
- Pricing the Engagement – Exploring the options
- Defining The Client Advisory Engagement

Section Two – Course Lab

Session 7 – Client Discovery and writing the report of findings

Session 8 – Strategize and Prioritize the engagement

Session 9 – Writing and presenting the strategic plan

Session 10 – Written proposals and engagement agreements

*PREREQUISITES: There are no prerequisites for this course.