Practice Advancement Program

Execution Workshop

The Ideal ENGAGEMENTS

You've learned 7 key areas in which to define and build your Ideal Practice in the Ideal Practice Parts 1 & 2 Courses—now it's time to make it real.

This execution workshop takes one of the most critical concepts from your Ideal Practice journey, your client engagements, and turns it into a fully implemented, working model inside your firm.

Across four sessions you'll define engagement scope and pricing with confidence, strengthen your agreements, mitigate risk, and establish outcome-based success measures. This workshop is designed to move you from intention to execution.

Syllabus

Session One – Getting off to a Great Start with Ideal Engagements

- Understanding and Working with Different Client Types/Personalities
- Client Communication and Experience
- Change Management Challenges
- How to convey your value

Session Two – Effectively Defining Relationship & Engagement Parameters

- Defining the Scope – The Discovery Report or SOW
- Essential Clauses to Use in Your Master Services Agreement
- Clarifying your Non-negotiables in Your MSA

Session Three –Mitigating Risk in Client Engagements

- Clarifying the Uses of Master Services Agreements vs. SOWs
- When to Use a Change Order
- Creating a Process to Determine when a Change Order is Needed and How to Communicate with Your Ideal Client
- Other Risk Mitigation

Session Four – Tools to Optimize Communications and Measure Success

- Leveraging Technology for Secure and Seamless Client Engagements
- Aligning Fees with Outcomes: Pricing Client Engagements for Value
- Measuring Engagement Success: Outcomes, Review Cycles, and Continuous Improvement

*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the Ideal Practice Parts 1 & 2 Courses. While not required, we strongly recommend attending the Ideal You workshop and the Strategic Pricing course prior to participating in this workshop.