



## Certified Transformative Advisor Program

### Operational Advisory

#### Syllabus

##### Section One - Client Goals Discovery Process – Winning the Business

Session 1: Beginning with the End in Mind: Why add Operational Advisory to your skillset?

Session 2: Fundamentals of Advisory

Session 3: Using a discovery meeting to win new clients; Preparing for your first Client Advisory Meeting

Session 4: Client Needs Analysis & Business Scan – Getting in the Business Owner’s head

##### Section Two - Monthly Accountability Meetings & Strategic Metrics

Session 5: Developing a Business Scorecard

Session 6: Identifying Key Performance Indicators & Building a KPI Dashboard

Session 7: Creating the Strategy Map

Session 8: Creating the Strategic Business Plan

##### Section Three - Practice Readiness – bringing it all together with a suggested “Best Practice” Advisory Business Model

Session 9: Executing the Plan through the Monthly Business Meeting

Session 10: Wrapping it up into an Advisory Package