



Practice Advancement Program

Execution Workshop The Ideal ENGAGEMENT

Workshop Description

What does it mean to have an Ideal Engagement? Explore these key areas that will ensure you have an enjoyable, productive and wealth generating relationship with your client.

Syllabus

Session One – Vetting Potential Clients Using Your Ideal Client Profile

- Creating a process to standardize client evaluation
- Understanding the true cost of a non-ideal client
- When and how to say "no"

Session Two – Best Practices for Client Assessment

- Creating a standard vetting sheet aligned with your Ideal Client Profile
- Defining a standard questionnaire for Project Scope Discovery

Session Three – Management Considerations when Building Contractual Agreements

- Clarifying the purpose of a Master Services Agreement (MSA)
- 10 Essential Clauses to consider in your MSA

Session Four – Maintaining Boundaries in Client Relationships and Managing Scope Creep

- Using change orders to manage scope creep
- Setting a process to determine and communicate scope
- Defending your value with clear parameters and confidence

*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the 10-week Ideal Practice Course.