



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 – Creating the Optimal Engagement

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

Session Two – To Effectively Define the Scope of the Engagement

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

Session Three – To Understand Factors to Help Mitigate Your Risk

- 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
- Risk Mitigation

Session Four – Measuring Success for You and Your Ideal Client

- Goal and Objective Challenges
- Creating Measurements Based on Outcomes
- Wealth Creation
- Techniques for Helping Your Clients Understand the Measurements

*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the 10-week Ideal Practice Course. While not required, we strongly recommend attending the Ideal You workshop and the Strategic Pricing course prior to participating in this workshop.