



Client Advisory Program

Foundations of Advisory

Course Description

The Foundations of Advisory course lays out the fundamental components of a successful advisory engagement. Learn to advise business owners on how to operate their business from discovering their pressing issues, goals, and priorities, through the planning and execution of a strategic plan. Take the mystery out of advisory, build your confidence, and guide your clients to success.

This course will move you beyond the transactional bookkeeping role and into the role of a highly valued resource for your client.

Syllabus

Section One – Foundations of Advisory – Discover, Plan, Execute

Session 1 – Introduction to the Foundations of Advisory

- Beginning with the End in Mind: Why add 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 Advisory Engagement

Section Two – Course Lab

Session 7 – Written proposals and engagement agreements

Session 8 – Client Discovery and writing the report of findings

Session 9 – Written proposals and engagement agreements

Session 10 – Writing and presenting the strategic plan

*PREREQUISITES: There are no prerequisites for this course.