



Practice Advancement Program

Execution Workshop The Ideal ENGAGEMENTS

Workshop Description

What does it mean to have Ideal Engagements? Explore these key areas that will ensure you have enjoyable, productive and wealth generating relationships with your clients.

Syllabus

Session One – Creating Optimal Engagements

- 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 Engagements

- 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 Clients

- 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.