



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