



Certified Transformative Advisor Program

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

2021 Operational Advisory (CTAO)

Cohorts-Wednesdays 5:30-7:30 PM Eastern

Study Halls-Thursdays 5:30-6:30 PM Eastern

Session 1	9/29	5:30-7:30 PM
Session 2	10/6	5:30-7:30 PM
Session 3	10/13	5:30-7:30 PM
Session 4	10/20	5:30-7:30 PM
Session 5	11/3	5:30-7:30 PM
Session 6	11/10	5:30-7:30 PM
Session 7	11/17	5:30-7:30 PM
Session 8	12/1	5:30-7:30 PM
Session 9	12/8	5:30-7:30 PM
Session 10	12/15	5:30-7:30 PM
Optional		
Study Hall	9/30	5:00-6:00 PM
Study Hall	10/7	5:00-6:00 PM
Study Hall	10/14	5:00-6:00 PM
Study Hall	11/4	5:00-6:00 PM
Study Hall	11/11	5:00-6:00 PM
Study Hall	11/18	5:00-6:00 PM
Study Hall	12/2	5:00-6:00 PM
Study Hall	12/9	5:00-6:00 PM