



Certified Transformative Advisor Program

Operational Advisory

Syllabus

- I. Section One - Client Goals Discovery Process – Winning the Business
 - A. How to use a discovery meeting to win new clients
 - B. How to move away from a financial metric focus and broaden the conversation
 - C. Identifying the most important skills for maximum effectiveness
 - D. Why emphasizing the “value proposition” is so important
 - E. How to use the MAUS technology to create professional presentations
- II. Section Two - Monthly Accountability Meetings & Strategic Metrics
 - A. To understand why strategic metrics are so important
 - B. To learn how to build a KPI Tree and identify highly effective KPIs
 - C. To understand how to create a scorecard from strategic metrics
 - D. To understand how to conduct a monthly review meeting and in the process establish a platform of success for you and your client
- III. Section Three - Practice Readiness – bringing it all together with a suggested “Best Practice” Advisory Business Model
 - A. How to structure your practice for success
 - B. How to build a process that provides maximum value
 - C. How to create a recurring revenue and get your messaging right
- IV. Section Four - Business & Strategic Planning
 - A. How to create a highly effective business plan
 - B. How to build the plan based on a thorough understanding of internal and external factors
 - C. How to transform that Business Plan into a monthly business advisory revenue stream



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Course Schedule with Optional Study Hall

Session 1	4/21/21 Wednesday	5:30-7:30 pm
Session 2	4/28/21 Wednesday	5:30-7:30 pm
Session 3	5/5/21 Wednesday	5:30-7:30 pm
Session 4	5/12/21 Wednesday	5:30-7:30 pm
Session 5	5/19/21 Wednesday	5:30-7:30 pm
Session 6	5/26/21 Wednesday	5:30-7:30 pm
Session 7	6/2/21 Wednesday	5:30-7:30 pm
Session 8	6/9/21 Wednesday	5:30-7:30 pm
Session 9	6/16/21 Wednesday	5:30-7:30 pm
Session 10	6/23/21 Wednesday	5:30-7:30 pm
Study Hall	4/22/21 Thursday	5:30-6:30 pm
Study Hall	4/29/21 Thursday	5:30-6:30 pm
Study Hall	5/6/21 Thursday	5:30-6:30 pm
Study Hall	5/13/21 Thursday	5:30-6:30 pm
Study Hall	5/20/21 Thursday	5:30-6:30 pm
Study Hall	5/27/21 Thursday	5:30-6:30 pm
Study Hall	6/3/21 Thursday	5:30-6:30 pm
Study Hall	6/10/21 Thursday	5:30-6:30 pm
Study Hall	6/17/21 Thursday	5:30-6:30 pm