



## 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 Halls

Session 1	7/7/21 Wednesday	5:30-7:30 PM
Session 2	7/14/21 Wednesday	5:30-7:30 PM
Session 3	7/21/21 Wednesday	5:30-7:30 PM
Session 4	7/28/21 Wednesday	5:30-7:30 PM
Session 5	8/4/21 Wednesday	5:30-7:30 PM
Session 6	8/11/21 Wednesday	5:30-7:30 PM
Session 7	8/18/21 Wednesday	5:30-7:30 PM
Session 8	8/25/21 Wednesday	5:30-7:30 PM
Session 9	9/1/21 Wednesday	5:30-7:30 PM
Session 10	9/8/21 Wednesday	5:30-7:30 PM
Study Hall	7/8/21 Thursday	5:30-6:30 PM
Study Hall	7/15/21 Thursday	5:30-6:30 PM
Study Hall	7/22/21 Thursday	5:30-6:30 PM
Study Hall	7/29/21 Thursday	5:30-6:30 PM
Study Hall	8/5/21 Thursday	5:30-6:30 PM
Study Hall	8/12/21 Thursday	5:30-6:30 PM
Study Hall	8/19/21 Thursday	5:30-6:30 PM
Study Hall	8/26/21 Thursday	5:30-6:30 PM
Study Hall	9/2/21 Thursday	5:30-6:30 PM
Study Hall	9/9/21 Thursday	5:30-6:30 PM