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

WOODARD™ INSTITUTE

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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