WOODARD™

Power Day Program

Financial Measurements Essentials

PDFM Course Description

Most business owners are not financial managers, and they need your expertise to help them make better decisions. During this Power Day you will gain an understanding of the skills and tools you can use in providing your clients with “operational intelligence” rather than just the usual accounting information they really don’t understand anyway. You will learn a simple process for adding significant value to their decision making while generating $200 to $500 per month for your efforts. And accomplish it all with less than 30 minutes of prep work before each client meeting.

Syllabus

Section One – Understanding the small business

- Management Dynamics – what drives financial outcomes
- Operations Dynamics – what drives financial outcomes
- Influences – Internal and External – what is impacting financial performance
- Profitability – Not what you think. All about net positive cash flow

Section Two – Understanding the financial information

- Analysis (Quantitative) – Outputs: Financial and mathematical measurement of performance
- Intelligence – How to convert the analytics to small business language (Actionable Management Advice)
- Interpretation (Qualitative) – Communicate to the client
- Value – Driven by Cash Flow

Section Three – Understanding the reporting process

- Plan
    - Objectives – what are they trying to accomplish over a given period of time
    - Quantifications – to measure progress
- Evaluate – Performance of the plan measured against the quantification of the plan
- Modify – Adjust the plan based on quantification (hit, miss or accept)
- Report – Leveraging all of the above in a standard approach conducted through monthly or semi-monthly meetings.

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Agenda

Times in Eastern	Segment
10:45 –11:00 am	Meet and Greet
11-11:40	Session 1 Presentation - Understanding the Small Business
11:40-12:00	Team Breakouts - Log in to MyAdvisor.ai, connect your file, generate report and review the small business dynamics you see.
12:00-12:40	Team Reports/Discuss small business dynamics showing up in students' MyAdvisor.ai reports
12:40-1:00	Break
1:00-1:40	Session 2 Presentation - Understanding the Financial Information
1:40-2:00	Team Breakouts - Personalize your Executive Summary - Business Performance and Business Position reports and add commentary to advise the client to correct a problem or enhance their position.
2:00-2:40	Team Reports/ Discuss how best to look beyond the report and personalize it to add value to your client.
2:40-3:00	Break
3:00-3:40	Session 3 Presentation - Understanding the Reporting Process
3:40-4:00	Team Breakouts - Create the proper structure in your presentation to create a consistent, organized delivery to maximize your client's understanding of the report.
4:00-4:40	Team Reports/ Discuss how best to present the customized report to your client for maximum value with minimal effort.
4:40-5:00	Conclusion/Motivate to Activate
5:00-6:00	Optional Q&A (if no questions the class ends at 5 pm Eastern)