

✦ Making The Leap Masterclass

the programme



DAY ONE: Meetings that Drive Value 10am - 4pm

Wed 22 June 2022

Wallacespace, Spitalfields
15-25 Artillery Lane,
London, E1 7HA

————— Coffee and registration **9.30 - 10am**

Your Role and Commitment to the Advisory Journey

- How to shift from Advisor to Coach / Mentor
- Your Advisory mindset (to move beyond compliance)
- Taking responsibility and making the commitment

What Your Clients Need and How to Give it to Them

- Linking your services to 'the 3 freedoms' your clients need
- The 5 pillars of value
- How to demonstrate the size of the opportunity

————— Lunch **12 - 12.45pm**

The 5 Meetings That Drive Value

- Meetings = Sales (if you follow the rules)
- On-boarding the right clients and re-engaging existing clients
- The hidden value of the Annual Accounts Review meeting
- Leveraging your Management Accounting service into Coaching
- Building a recurring revenue stream

Managing Your Marketing

- Refreshing your brand via 'The Golden Circle'
- Attracting the right clients
- Uncovering the power of Education Marketing

————— Afternoon Tea **2.30 - 2.45pm**

Essential Sales Skills

- Avoiding giving value away for free
- Problem solving sales techniques

————— Celebration and Networking Drinks **4 - 6pm**

THIS WORKSHOP
QUALIFIES FOR
5 VERIFIABLE CPD
HOURS



ENQUIRIES

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