

✦ Making The Leap Masterclass

the programme

DAY ONE: Meetings That Drive Value 9am - 4pm

Coffee and registration **8.30 - 9am**

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

Effective Conversations

- Your default communication style
- How to master your stories to achieve results
- A framework to engage in difficult conversations successfully with anyone

What Your Clients Need and How to Give it to Them

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

Lunch **12 - 12.45pm**

The Five Meetings That Drive Value

- Meetings = Sales (if you follow the rules)
- Onboarding 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

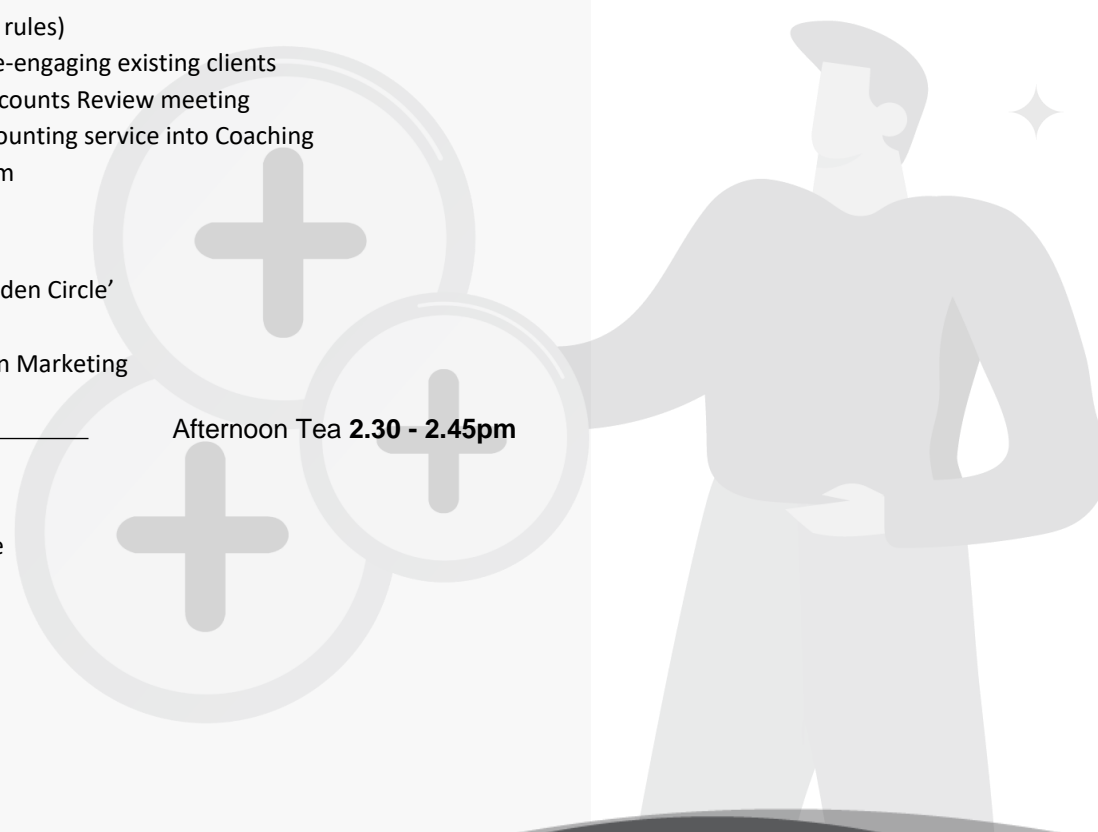
Xero Amplify



Thurs 9 June 2022

Ellerslie Event Centre
100 Ascot Avenue,
Remuera,
Auckland

THIS WORKSHOP
QUALIFIES FOR
6 VERIFIABLE CPD
HOURS



ENQUIRIES
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