

# Making The Leap Masterclass

the programme

**Xero Amplify**



## DAY TWO: Essential Services 10am – 4pm

Coffee and registration **9.30 - 10am**

### Your Required Mindset for Advisory Success

- Your four stages of learning
- Overcoming roadblocks and limiting beliefs
- Defining your Advisory identity

### Meetings that Drive Value (Recap from day 1)

- The five meetings that drive value
- Points of value
- Building a recurring revenue stream

Lunch **12 - 12.45pm**

### The Annual Business Plan Unpacked

- Positioning the value
- Facilitation and delivery essentials
- Building the plan without fluff
- Making planning an annual recurring service

### Moving Beyond the Forecast

- How to reposition forecasting from an 'On demand, bank requested service'
- Teaching your clients their Cash Conversion Cycle
- The Cashflow & Profit Improvement Meeting

Afternoon Tea **2.30 - 2.45pm**

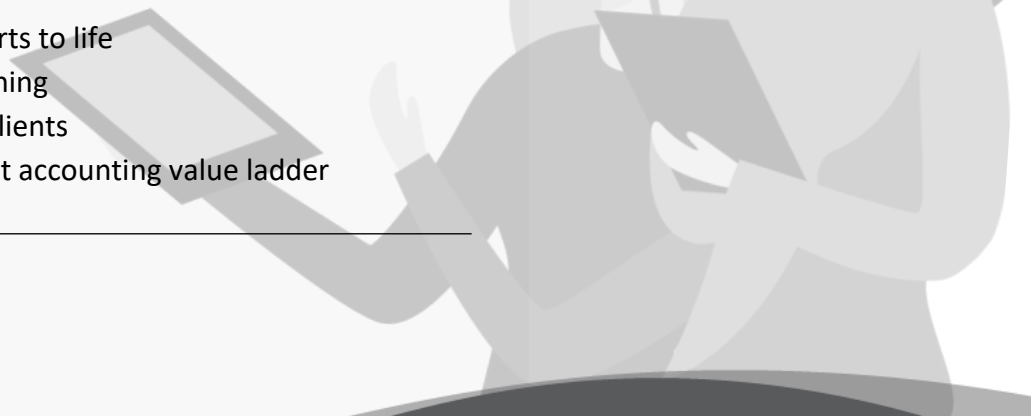
### Ongoing Reporting and Accountability

- Bringing management reports to life
- The structure of great coaching
- Coaching options for your clients
- Moving up the management accounting value ladder

**Fri 10 June 2022**

Ellerslie Event Centre  
100 Ascot Avenue,  
Remuera,  
Auckland

THIS WORKSHOP  
QUALIFIES FOR  
**5 VERIFIABLE CPD**  
HOURS



ENQUIRIES  
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