

Making The Leap Masterclass

the programme



DAY TWO: Essential Services 10am – 4pm

Coffee and registration **9.30 - 10am**

Your Required Mindset for Advisory Success

- Your 4 stages of learning
- Overcoming roadblocks and limiting beliefs
- Defining your Advisory identity

Meetings that Drive Value (Recap from day 1)

- The 5 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 and 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

Thurs 23 June 2022

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

THIS WORKSHOP
QUALIFIES FOR
5 VERIFIABLE CPD
HOURS

