THE.GAP

Advisory Activator

A 3-part online course designed to launch scalable advisory services from your compliance offering.

Advisory Activator

Why we developed this course:

The shift from compliance to advisory is often overwhelming.

Most small businesses need more support to excel in their business, but don't know, what they don't know. Let alone how their advisor can help.

Advisors want to offer more but struggle with where to start and how to position themselves. They're also the busiest they've ever been.

Advisory Activator shows advisors how to remove those barriers and grow the demand for scalable advisory services.

Using The Gap's tools, advisors can:

- Show businesses what's possible
- Increase demand for advisory services
- Lift average fees per client
- Build recurring revenue

Course objectives:

1. Enhance and re-engineer your client meeting process as your number one client engagement strategy.
2. Learn how to demonstrate clear and enduring value to clients using practical and easy-to-use tools.
3. Create a seamless link from compliance to advisory services that your clients want to buy.
4. Develop a plan to launch advisory.
5. Fast-track a recurring revenue stream.

Who is this course for?

Accounting and Bookkeeping firms looking to start their advisory journey or wanting to better integrate advisory into their service offering.

COURSE DETAILS:

Session 1
Define your advisory baseline

LEARNING OUTCOMES:

- Learn how to set and articulate your advisory value ladder
- Define your ideal client and enhance your onboarding process to drive advisory services
- See how meetings drive value-add opportunities
- Understand the benefit of human interaction
- Learn how to free up capacity to deliver advisory

Session 2
Position your value

LEARNING OUTCOMES:

- Enhance your annual accounts review processes
- Understand the value your clients want and learn how to articulate that value clearly
- Master the Value Gap Calculator and how to use it effectively in your advisory strategy
- Demonstrate the opportunity in your clients' businesses
- Become confident in your ability to drive better business outcomes - for you and your clients

Session 3
Demonstrate best practice

LEARNING OUTCOMES:

- Learn how to deliver the Cashflow & Profit Improvement Meeting
- Sell authentically and with confidence
- Re-define best practice for you and your team
- Learn how to make ongoing forecasting and reporting 'normal activity' for business clients
- Create and implement your plan for launching and scaling your advisory service offering

Your investment includes:

- Enrolment to 3 x 90-minute sessions
- Pre-work to enhance your learning outcomes
- Expert facilitators with extensive advisory delivery experience
- Developing your advisory implementation plan during the course
- Access to recordings & additional learning resources
- Subscription to The Gap for the duration of the programme
- Up to 9 CPD hours for each participant

Limited to 40 attendees per course

Ready to activate advisory?

THE.GAP
Advisory, made easy.