

## Transformative Advisor

### Operational Advisory Certification

#### Syllabus

- I. Section One - Client Goals Discovery Process – Winning the Business
  - A. How to use a discovery meeting to win new clients
  - B. How to move away from a financial metric focus and broaden the conversation
  - C. What are the most important skills for maximum effectiveness
  - D. Why emphasizing the “value proposition” is so important
  - E. How to use the MAUS technology to create professional presentations
  
- II. Section Two - Monthly Accountability Meetings & Strategic Metrics
  - A. To understand why strategic metrics are so important
  - B. To understand how to create a scorecard from strategic metrics
  - C. To understand how to conduct a monthly review meeting and in the process establish a platform of success for you and your client
  
- III. Section Three - Practice Readiness – bringing it all together with a suggested “Best Practice” Advisory Business Model
  - A. How to structure your practice for success
  - B. How to build a process that provides maximum value
  - C. How to create a recurring revenue and get your messaging right
  
- IV. Section Four - Business & Strategic Planning
  - A. How to create a highly effective business plan
  - B. How to build the plan based on a thorough understanding of internal and external factors
  - C. How to transform that Business Plan into a monthly business advisory revenue stream