

THE BUSINESS DEVELOPMENT TRIFECTA

MASTERCLASS

the programme



novotel brisbane
FRI, 16 MAR 2018 | 8:45 - 4:30

coffee & reg. 8:15am

your outcomes for the day

- Appreciating the roles you play: Coach, Consultant, Mentor, Advisor
- Understanding the key BD products your clients need
- Knowing how to deliver the 'Trifecta' of BD services
- Avoiding reinventing the wheel
- A clear plan for how to move forward

marketing & selling

- Your two most important marketing activities
 - The Complimentary Client Review
 - The educational seminar

morning tea 10:20am

the business planning session

- Your role as facilitator
- Why pre-work is essential
- How to facilitate the 4-hour session
- Building the one-page plan
- Making planning an annually recurring revenue stream

lunch 12:20pm

financial forecasting

- Revenue is vanity, profit is sanity, cash is king
- The Forecast is the first step in better cashflow management
- Teaching clients their cash conversion cycle
- Linking forecasting to regular reporting
- Cashflow management coaching

quarterly coaching

- The role of the coach
- The structure of coaching
- Coaching resources that make you look great
- Client responsibility & self-assessment
- Dealing with implementation resistance
- Building a leveraged & recurring revenue stream

afternoon tea 3:05pm

mindset tools & resources you must know

- The 10 best coaching concepts you must know by heart

your next steps

- Your smart goals and 3 most important actions
- Building your own plan
- Establishing your own accountability framework



THIS WORKSHOP
QUALIFIES FOR 6.5
VERIFIABLE CPD HOURS.

accountants
leading
small
business
success

THE BUSINESS DEVELOPMENT DELIVERY ESSENTIALS

about our key speakers...

MARK JENKINS CA, CPA

Mark established Quay Accountants, 2020 Business Dynamics & co-founded The Gap. At Quay, he generated \$2m p/a, of which over 50% was from systemised BD work. Focused on quality of life, his success stems from the design, branding & packaging of services & creating recurring income.



VIV BROWNRIGG FCA

Viv created Business Fitness NZ & co-founded The Gap. With 25 years' public practice experience, she now coaches multiple firms, helping them to implement BD services. Her over-arching message is simple, SMBs need accountants to work with them - to lead, manage and plan much more effectively.



THE GAP



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