

# Closing the value gap masterclass



## The programme

10am - 4pm

Tuesday, 9 May 2023

Coffee and registration **9.30 - 10am**

Auckland Airport Novotel,  
Ray Emery Drive,  
Auckland

### The client journey and onboarding experience

- Your ideal client - less is more
- Designing and marketing your customer journey
- Linking your customer journey to your value ladder
- Creating a first-class onboarding experience
- The Proactive Accounting Meeting as the first step

### Levelling up your Annual Accounts Review (AAR) Meeting

- The value in the AAR Meeting
- Current industry practice
- Best practice delivery
- Positioning the next step on the value ladder - a paid meeting
- Getting clients to commit to the AAR Meeting

Lunch **12.10 - 1.10pm**

### The Value Gap

- Using The Value Gap Calculator
- Closing the Gap - tactics to improve profit and cashflow

### The Cashflow & Profit Improvement Meeting (CPIM)

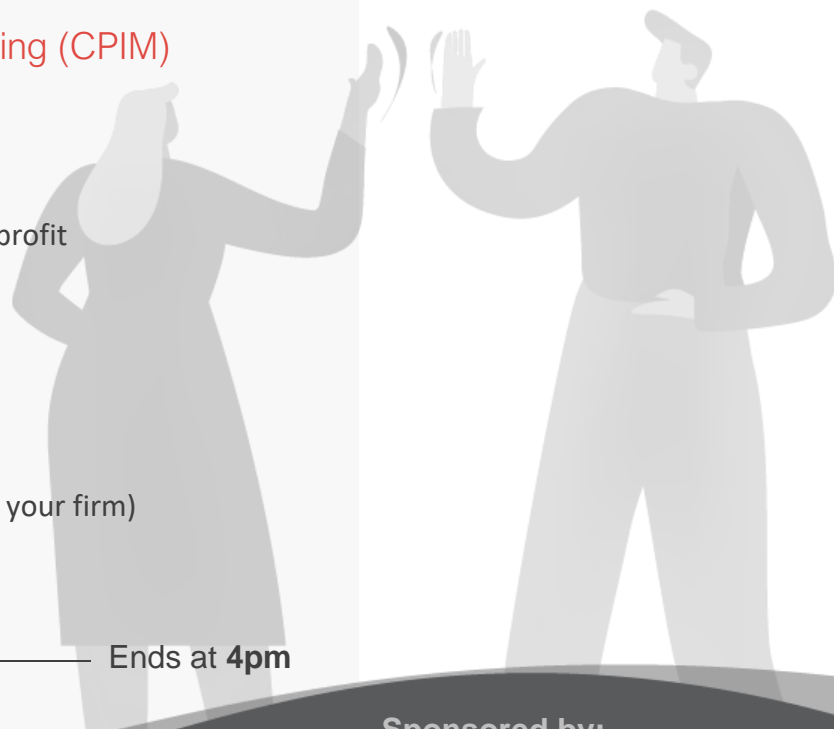
- Preparing for the meeting
- Session delivery and post session follow up
- Identifying improvement potential
- Positioning tactics to deliver better cashflow & profit
- Selling the CPIM by de-risking the cost
- Selling the service - common pathways

### The Risk Management Meeting

- The value in helping clients to mitigate risk
- Using the Risk Register tool with clients (and on your firm)
- The Risk Management Meeting process
- Selling the service - common pathways

Ends at **4pm**

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



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