The LEAP Programme

The 9-week programme for CAs in practice looking to learn the essential skills and processes to build an advisory business.

This programme is delivered with the generous support of our strategic partner, Fathom.

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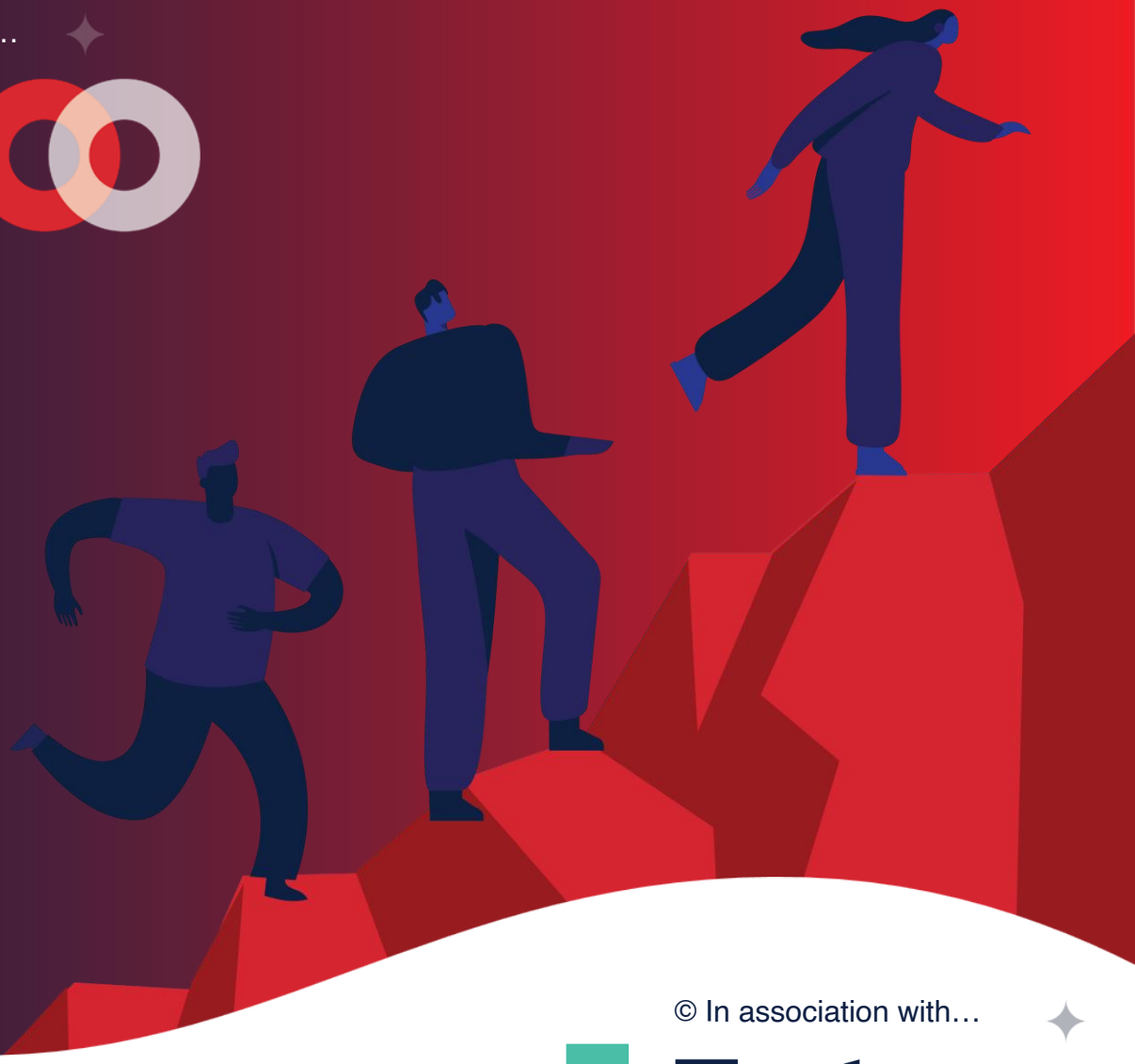
THE GAP



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Why we developed this programme

There is much rhetoric in the accounting industry about the importance of advisory yet little detail on the 'how to'. Accounting firms know they need to deliver these services but experience real roadblocks that prevent implementation.

There's also a disconnect between accountants and their SME clients. On one hand, accountants struggle to articulate the tangible nature and value of advisory to clients. On the other hand, SMEs need help to run a better business, yet aren't asking for these services.

The LEAP Programme is designed to help close this chasm between accountants and their clients, address the barriers to delivering advisory and provide the practical 'how to' in a systemised, efficient, and leveraged way.

Who should join a LEAP Programme?

The LEAP Programme is suitable for Chartered Accountants in practice who are looking to start their advisory journey or want to better integrate advisory services into their current service offering.

What you'll receive

Participants take part in nine weekly online sessions presented by The Gap. Each 90-minute session is delivered by a Chartered Accountant with extensive experience in the business advisory space.

Participants complete detailed pre-work for each session to ensure they receive maximum value from the programme, address their specific challenges, and get runs on the board.

With access to a dedicated Gap Member Success Specialist and the full range of Gap tools, you'll develop your Advisory Implementation Plan as you progress through the programme.

Participation is limited to 20 firms per programme.

Register here

Programme Objectives

KEY OBJECTIVES OF THE PROGRAMME:

1. Understand and be able to articulate the benefits of advisory and increase client demand.
2. Learn how to market, sell, and deliver the three essential advisory services.
3. Address the common barriers to delivering advisory (no time, no confidence, no system).
4. Develop a rock-solid plan to implement advisory.
5. Fast-track a recurring revenue stream.

Programme Sessions

Session 1: Induction and programme fundamentals

LEARNING OUTCOMES:

- Understand the mindset and commitment required
- Appreciate the roles you play as coach, advisor, mentor, and consultant
- Identify the key advisory services your clients need
- Top coaching mindsets you need to know
- The three essential tools for business success
- The five most powerful meetings that drive advisory and business development services
- How to sell without product pushing

Sessions 2 - 4 cover three essential tools in detail.

Session 2: The annual Business Plan

LEARNING OUTCOMES:

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

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Session 3:
The forecast combined with cashflow management

LEARNING OUTCOMES:

- Reposition forecasting from an 'on demand, bank requested service'
- Teach your clients their cash conversion cycle
- Link forecasting to regular reporting with accountability
- How to deliver the Cashflow & Profit Improvement Meeting

Session 4:
Ongoing reporting with accountability

LEARNING OUTCOMES:

- Bring your management reports to life
- Develop your role as coach
- Coaching resources that make you look great
- Clarify client responsibility and self-assessment
- How to overcome implementation resistance

Sessions 5 -7 cover meetings that drive advisory services.

Session 5: The Annual Accounts Review Meeting

LEARNING OUTCOMES:

- Learn how to scale via your team
- Articulate the value you've already provided
- Realise the value-add opportunities from the Annual Accounts
- Separate the history from the future

Session 6: The Onboarding & Complimentary Client Review Meetings

LEARNING OUTCOMES:

- Client selection fundamentals
- Reposition advisory as the main course and compliance services as the side dish
- What a customer-centric onboarding experience looks like
- The value in the Complimentary Client Review
- How to free up capacity to deliver
- Follow-up processes that increase sales conversions

Session 7: The Momentum & Coaching Meetings

LEARNING OUTCOMES:

- Revisit your role as coach
- How to link ongoing reporting with coaching
- The power of pre-work
- A deep dive into the coaching process

Session 8: Marketing and selling

LEARNING OUTCOMES:

- How to seamlessly deliver education marketing
- How to reverse engineer your objectives and attract the right clients
- Fine tuning webinar and seminar delivery
- Three essential sales techniques
- How to sell without product pushing

Session 9: Implementing your plan

LEARNING OUTCOMES:

- Completing your plan
- Your most important actions
- Accountability
- Support available from The Gap

Programme details

Programme pricing: $2,995 + GST per firm
*Less Fathom sponsorship $1,000
Net investment per firm: $1,995 + GST

Your investment includes:

- Enrolment for two participants
- Subscription to The Gap for the duration of the programme
- Up to 23 CPD hours for each participant

Programme dates:

Our next LEAP Programme commences on Wednesday, 14th September 2022.

*Fathom sponsorship only available for Fathom customers

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