ConvergenceCoaching®, LLC
Client Advisor Program™ (CAP) Overview

Deliver Advisory Services to Help Clients Navigate Shifting Priorities
In this dynamic and uncertain market, clients require a different level of service to support their business success and financial well-being. Their needs demand more than our compliance deliverables, providing information and guidance to help them make swift decisions as they manage cash, pivot their business models, and navigate staffing, technology and other infrastructure changes. To make the shift to a truly strategic client advisor, you'll have to shed old ideas and habits and develop both your advisory skills and an advisory approach to engagements.

The **ConvergenceCoaching® Client Advisor Program™ (CAP) is an entirely remote, modular program designed to teach experienced CPAs and consultants advisory skills and strategies to deepen their client relationships, broaden the support they provide clients beyond compliance services and ultimately make a bigger difference in their lives and businesses.**

The CAP is designed to help those who manage and/or control client relationships and is delivered in a series of five virtual roundtables with work assigned in between them. This "homework" enables participants to apply the ideas to real-life clients and engagements and report their roadblocks and results to experienced CAP coaches who can help them progress. **The result is participants becoming more indispensable to clients with every module mastered**.

Each 2-hour Roundtable is conducted via a videoconference platform that maximizes interactivity with all participants. Class size is managed to enable ample time for sharing and networking with peers from other firms to develop lasting relationships, too.

The program's five modules and associated outcomes include:

Roundtable 1: Program Kick-off: Becoming an Advisor

- Introductions and discuss the structure and expectations for the program
- Dive into foundational advisory concepts that will influence our future discussions in the CAP, including:
    - **What is an advisor**, and how is differs from a compliance provider or consultant
    - **The benefits and barriers of being an advisor** with client examples and stories to illustrate possibilities
    - **The attributes and mindset of an advisor**, including an assessment of w**here are you now** and **where do you strive to be**
    - **How to create capacity** to be the kind of advisor to your clients that you envision
- **Identify which clients to approach first** and develop your ideal target client profile so that you can be strategic in your efforts
- **Generate possible advisory services** that could make a difference for these clients

Roundtable 2: Developing your Advisory Approach

- Check in on **homework and progress** since the last roundtable
- Shifting from transactional to transformational in your relationship
- Discuss tactics **to deepen client rapport and begin to manage client relationships remotely**
- Share **methods to approach your client** to begin uncovering ways you can help them by:

- **Using query** and gaining skills in asking different types of questions and leading conversations with clients
- **Asking for permission to coach** your client
- Uncovering and **overcoming objections** for possible solutions
- Becoming **comfortable with not having all the answers** and collaborating with your clients and others to generate possible solutions

- Prepare to **set up and hold 2 client check in calls**

Roundtable 3: Becoming a Bold, Authoritative Coach

- Check in on **homework and progress** since the last roundtable
- Define a **successful coaching framework** using a proven toolset for real clients that delivers results including:
    - Assessing and understanding the client's environment, objectives, and goals
    - Undertaking client account planning and strategy
    - Collaborating to generate possible solutions
    - Defining and taking next steps
    - Checking back in on progress
    - Delivering feedback and assessing again
- Leverage your network and **make connections** to solve client issues
- **Practice conversations** with clients that engenders confidence and credibility

Roundtable 4: Packaging, Pricing and Selling Advisory Opportunities

- Check in on **homework and progress** since the last roundtable
- **Scope and price advisory** as you identify possible solutions and approaches to address clients' needs
    - Develop modules or phases that can be leveraged into custom and unique solutions
    - Apply cash management best practices that manage client expectations across the firm
    - Prepare for and handle objections as they arise including **repositioning your traditional compliance relationships**
- Explore **packaging and pricing options for an ongoing coaching relationship**
- **Listen and remain flexible** to apply new information as it arises to address the current needs
- Discuss how to keep projects going and how to **transition from one phase to another**

Roundtable 5: Making your Advisory Commitment Real

- Check in on **homework and progress** since the last roundtable
- Discuss client advisory opportunities from the class to further them by:
    - Identifying next steps and thinking outside the box for their unique situation
    - Discussing how to remove roadblocks as they occur
- Determine **other clients or prospects that would benefit** from similar solutions and plan to discuss ideas with them
    - Learn a cross-selling methodology that analyzes your clients based on current and potential services and plan for follow up

- Tell others in the firm about your new advisory commitment
- Identify potential service packages that you might be able to offer to groups of clients on an ongoing basis
- Track and share opportunities to **increase follow up success and enhance visibility** about opportunities across your department or firm

Most of us want to make a bigger difference for our clients but we haven't really known how or had a method to create a systematized approach to doing so. Participate in our highly interactive, customized Client Advisor Program™ to gain the skills you need to **be a more transformative advisor and coach, and the methodologies to dive deeper with clients, generate innovative solutions and add value in ways that transform your clients and your practice.**

For more information about the **ConvergenceCoaching Client Advisor Program™**, contact us at info@convergencecoaching.com or visit www.convergencecoaching.com/leadership-learning/#_cc-cap to register today!

This program includes group-live, self-study, and web-based events and is an intermediate-level program where the prerequisite is that attendees be manager level or above. No prerequisites or advanced planning is required to attend. The two in-person workshops are critical to the learning experience and are therefore mandatory. Please be certain the workshop dates work for you prior to registering. For complete information regarding our make-up, refund or cancellation policy, visit www.convergencelearning.com or email us at learningcenter@convergencecoaching.com. ConvergenceCoaching, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.