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

Deliver Advisory Services to Help Clients Navigate Shifting Priorities
In this dynamic and sometimes turbulent 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 spending and saving, 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 six virtual roundtables with work assigned in between sessions. 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 six modules and learning objectives include:

Roundtable 1: Exploring the Advisor Mindset and Attributes

- 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:
    - **The benefits and barriers of being an advisor** with client examples and stories to illustrate possibilities
    - **The attributes and mindset of an advisor**, including how it differs from a compliance provider or consultant and an assessment of **where you are now** and **where you strive to be**
    - **Ideas to create capacity** to become the kind of advisor to your clients that you envision
- **Develop your ideal target client profile** and **identify which clients to approach first** so that you can be strategic in your efforts
- **Generate a list of possible advisory services** that could make a difference for these clients

Roundtable 2: Advancing Your Advisory Communication Skills

- Check in on **homework and progress** since the last roundtable
- Identify methods for 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** and 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 and **articulating benefits** the client will experience by implementing the changes you're recommending
    - Being **comfortable 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 **objectives and possible solutions**
    - Leverage your network and **make connections** to solve client issues
    - Scope coaching services you could offer clients
- **Practice conversations** with clients that engender confidence and credibility

Roundtable 4: Defining Your Advisory Services and Scope

- Check in on **homework and progress** since the last roundtable
- **Explore strategies to scope advisory services** as you identify possible solutions and approaches to address clients' needs
    - Develop modules or phases that can be leveraged into custom and unique solutions
    - Practice scoping and packaging possible advisory services
- **Develop an approach to discuss your advisory offerings with your clients and prospects**

Roundtable 5: Effectively Pricing and Selling Advisory Opportunities

- Check in on **homework and progress** since the last roundtable
- Discuss how your phased projects are going and how to **transition from one phase to another**
- Review best practices for proposing your advisory solutions, including advisory pricing methods Apply billing best practices to better manage client expectations and create consistency across the firm
- Prepare for and handle objections as they arise including **repositioning your traditional compliance relationships**
- **Listen and remain flexible** to apply new information as it arises to address the clients's current needs

Roundtable 6: Making your Advisory Commitment Real

- Check in on **homework and progress** since the last roundtable
- Discuss client advisory opportunities from participants and further them by:

  - Identifying next steps and thinking outside the box for their unique situation
  - Discussing how to remove roadblocks as they occur
- Track and share opportunities to **increase success and enhance visibility** across your department or firm
- Share your key takeaways from the CAP and next steps to keep progressing your advisory approach

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 our public or a customized in-firm **ConvergenceCoaching Client Advisor Program**, contact us at info@convergencecoaching.com or visit www.convergencecoaching.com/leadership-learning/#_cc-cap to register for a public program today!

For more information regarding our refund, complaint, and program cancellation policies, please contact us.

Who Should Participate: Experienced managers and above with experience owning client relationships and some exposure to personal marketing and business development

Duration: Six months

Class Size: Up to 14 participants

Level: Intermediate

Instructional Delivery Method: Remote group internet-based roundtables

CPE Credits: Up to 14.4 credits hours

NASBA Fields of Study: Personal Development, Communications & Marketing

Prerequisites: Experience owning client relationships, some exposure to personal marketing and business development

Advanced Preparation: Advanced prep materials to be sent via email to participants ahead of the first roundtable

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