

2-Day Business Planning Workshop for Financial Advisers & Accountants

Successfully open a gap ahead of the peloton and make it stick



Imagine you have in your hands a one page plan that documents your ultimate vision for your business and encompasses your dream business life, working with your ideal clients and combatting the pressures that are changing the profession.

On that same page you have the three year, 12 month and quarterly targets you need to achieve your ultimate vision. Amazingly, you also have a 90-day action plan so you can focus on the 2-3 items that will have the quickest and biggest impact to get you momentum on what will be the best business journey of your life...

Understand the CRITICAL NUMBERS AND ACTIONS that will drive your success

... then take a moment to marvel at what you've just created...

This one page plan was designed to help you achieve Maximum Cash-flow, Risk Mitigation, Improved Profit, Team Engagement, Client Advocates, Professional Potential, Revenue Growth, Work Life Balance

When:

Tuesday 14th & Wednesday 15th
November

Who:

Small group: maximum of 16 firms

Recommended for all equity directors in a business and any senior advisers that are on track to becoming a director

Where:

Sydney CBD

*"If you're offered a seat on a rocket ship,
don't ask what seat! Just get on"*

Sheryl Sandberg

This workshop has been the start of significant and life-changing results for other business owners and we know it will be for you too

"The Breakaway workshop exceeded my expectations and has given me an exciting vision of the future plus a clearly articulated step by step strategy to take where we want to go"

Sandra Wills, Wealthways – Sunshine Coast QLD

The Breakaway Workshop Overview

- It's a 2 day business planning workshop delivered by Scott Charlton and Sharon McClafferty
- We have created a one page strategic business plan specific to Financial Advice and Accounting businesses
- You will design your business the way you want to run it
- Learn how to get your team engaged and excited about your plan
- Learn how to improve all of your KPI's in an exciting 2 day format



"Do it sooner rather than later"

Krys Canny-Smith, Canny Group

Prior to the workshop

- **Preparation Questionnaire**
- **60 minute one-to-one Business Performance Review including what if analysis**

Day one

- The future of your profession
- Refreshing your professional headspace
- Evaluate the business lifecycle
- Define the culture you want to create
- Define your ideal clients
- Creating your core purpose – your WHY
- Articulating your core values
- Setting your Big Hairy Audacious Goals
- Identifying your SWOT analysis
- Networking dinner*

Day Two

- 3 year targets and key numbers to hit
- 3 year capabilities needed to hit targets
- Identify your brand promise
- Activity to measure brand promise KPIs
- 1 year targets, key numbers & key initiatives
- Set your quarterly goals & key initiatives
- Introduce themes & celebrations to your team
- Getting your team engaged
- Creating a 90 day implementation plan
- Running effective meetings & creating a meeting rhythm

Post-Breakaway Coach Call

Post your Breakaway Workshop, you will have a 60-minute action phone call with our Director of Coaching who will work with you to finalise your plan and ensure it is implemented effectively.

This business planning process is \$1500+GST per person.

To book your place email sharon@slipstreamcoaching.com.au or call 07 3007 2070

Payments can be made by EFT or Credit Card, facilitated by our engagement platform, Practice Ignition.

*Dinner expenses are not included and invoiced separately after the workshop