

BASIP Training - Implementation Package - Roadmap



Step 1 - Introduction to Business Advisory Services	
<ul style="list-style-type: none"> • Facilitator • What do SMEs want? Assistance on non-compliance financial services • Procedure Control Form for each module • Partner Evaluation • Team Member's Survey 	<ul style="list-style-type: none"> • Client Surveys • Industry Groups • Attributes of A & B Class Clients • Predictions of Accountancy Business Evolution 2016-2019
Step 2 - Getting Organised for Business Advisory Services	
<ul style="list-style-type: none"> • Balanced Scorecard Questionnaire • SWOT Analysis • Competitive Advantage • Foundation Work • Do you want to be different? 	<ul style="list-style-type: none"> • What is the CFO's role? • Business Advisory Centre • Setting the scene • Future services that you could offer your clients
Step 3 - Team Training	
<ul style="list-style-type: none"> • Meetings with team members • Mentoring Programme • Product Champions • Industry Champions • Career Development Plans • Coach 	<ul style="list-style-type: none"> • Team Member Responsibilities • The Right People Checklist • Training Programme for BAS • Mentor(s) • Business Development Manager
Step 4 - Leadership	
<ul style="list-style-type: none"> • 8 Steps to Introduce Change • Pre-Facilitation Survey • Leadership Evaluation Record • Leadership Development - Evaluation Survey 	
Step 5 - SME Needs' Analysis	
<ul style="list-style-type: none"> • SME Needs' Analysis • Chief Financial Officer Services • Strategic Management Consultancy • Business Evaluation Workshop Checklist 	
Step 6 - Marketing Strategies	
<ul style="list-style-type: none"> • Checklist for BAS Marketing Plan • Checklist of Conversion Rate Techniques & Tactics • Checklist for Successful Marketing Hints for BAS • Marketing Positioning Checklist 	<ul style="list-style-type: none"> • Performance Standards • Identification of Clients for BAS • Digital Disruption Is It a Disruption or an Opportunity? • Small business surveys
Step 7 - Review of Products	
<ul style="list-style-type: none"> • Potential Products/Services • Performance Standards • Gold Package of Bundled Services • Silver Package of Bundled Services • Bronze Package of Bundled Services • Review of Products/Services That Could be Offered 	<p>Introduction of Product Modules:</p> <ul style="list-style-type: none"> • Debtors' M'ment • SME Debtors' M'ment • PPSR Due Diligence Review • CFO Services • Business Evaluation Workshop • Cashflow M'ment • Budgets & Cashflow Forecasts • Succession Planning • Strategic Business Mentoring • Business Planning Consulting • Buying a Business • Selling a Business • Grants for SMEs • Business Health Checks
Step 8 - Planning Seminar to Launch Business Advisory Services	
<ul style="list-style-type: none"> • Organisational Checklist-Seminar for BAS • Venue Booking Confirmation • Seminar Invitation • Seminar Timetable • Handout-for each product 	<ul style="list-style-type: none"> • Seminar Attendees' List • Script for Introduction of New Services • Script for each product • Script-How do we assist our Clients? • Planning Seminar to Launch BAS
Step 9 - Selling Business Advisory Services	
<ul style="list-style-type: none"> • Guidelines for Submitting the BAS Proposal • Work Flow Process for BAS Checklist • BAS Selling Guide • Quotation Form-for each product 	<ul style="list-style-type: none"> • Clients Work Brief • Work Programme Budget Quotation Form-for each product • Proposal-for each product • Selling Business Advisory Services
Step 10 - One-on-One Meeting	
<ul style="list-style-type: none"> • SME Needs' Analysis • CFO Services • Strategic Management Consulting • Work Programme Budget Quotation Form Succession Planning Consultancy • Proposal for Succession Planning Consultancy Assignment 	
Step 11 - Implementation of Business Advisory Services for your Clients	
<ul style="list-style-type: none"> • Assignment Completion Checklist • Introductory Seminar Checklist • Overcoming Perceived Objections 	<ul style="list-style-type: none"> • Offering BAS Checklist • M'ment of the Practice Development Enterprise • Turning your Accountancy Firm into a Client Business Centre