‘Transition to Adviser’ Programme

Developing trusted and valued client Advisers

This is a four part development programme which helps professionals to create clear client value and drive fee revenue through a proactive focus on solutions to client challenges and opportunities. It enables teams to be positioned closer to clients, and helps them to develop stronger and more trusting relationships through a deep understanding of clients and their worlds.

The Transition to Adviser programme has been implemented across a wide range of firms, international networks and through the Institute of Chartered Accountants in England and Wales. It provides:

- Interactive and practical modules focused on embedding new behaviours
- Toolkits and resources which can be used immediately to help create better client interactions, identify client service opportunities and create value

Summary of benefits:

- Greater client retention
- Creates more opportunities for fees
- Builds confidence to change mindset from technical specialist to client *Adviser*
- Improves ability to bill value and not time
- Explains how to transition conversations – from ‘selling my service’, to being ‘gatekeeper’ for a range of solutions
- Build stronger, more trusting relationships with clients
- Provides a process to proactively create and nurture an ‘ADDviser’ network
- Draws on experience, stories and practical lessons to turn ideas into actions
- Creates clear steps to transition to the trusted *Adviser* and builds the confidence to take them
- Individual follow up guarantees learning is embedded into action

The Programme Model:

Client Adviser

- Continuous action to embed new behaviours, mindset and confidence
- Being brave, assertive and a critical friend
- Creating effective approaches to positioning solutions to client challenges
- Building wider and deeper relationships
- Influencing clients through TRUST
- Developing your ADDviser network – understanding who you need to know
- Building your knowledge of the full service proposition of your firm
- Changing the focus of client interactions – planning, questioning, listening: CRM
- Gaining a deeper understanding of clients
- The role and mindset of a proactive, client focused Adviser

Technical specialist

Personal Impact and Capital

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‘Transition to Adviser’ Programme

The Transition to Adviser programme consists of four powerful half day sessions that build knowledge and confidence:

Session 1:
Defining the role of the Adviser and developing mindset

- Introduction and context
- Defining the role of an *Adviser* and assessing the individuals starting position
- Focusing on the benefits for you, your firm and your clients
- Developing confidence and an *Adviser* mindset – understanding the value you create for clients and ‘Leading’ as an *Adviser*
- Creating accountability for action

Session 2:
Developing an Advisery approach to clients

- The *Adviser* interaction model
- The importance of being curious – great questions and active listening
- Understanding clients, their worlds and challenges
- Capturing client knowledge through tactical client plans
- Collaborating to create strong approaches to providing client value led solutions
- Building an ADDviser network

Session 3:
Building trusting relationships

- What do your clients want from you?
- Why do they ‘buy’ you?
- Building influence and creating trust
- Understanding communication styles to improve client interactions
- Personal chemistry and rapport
- Relationship mapping – building wider and deeper relationships
- Being brave and assertive with clients

Session 4:
Positioning solutions to solve client challenges

- Begin with the client – recap on understanding their worlds, their challenges, their opportunities and their ‘thirst’ to take action
- Building confidence in discussing / positioning the full service offering of the firm and identifying when to bring in colleagues
- Creating a process to help clients clearly see the value in the service / solution
- Practical case studies

All sessions include pre-work, focused action plans and takeaway resources / tools. Learning can be immediately embedded into performance helping to improve client relationships, interactions and commercialising value.

> **A very enlightening programme. It was so valuable to get such a fresh perspective on providing value to clients and being much bolder in providing options for solutions..**
>
> Partner – South Korean firm

> **“This has given me the confidence, tools and insight to really help me be an ADDviser to my clients. Thankyou”**
>
> Director – South African firm

Please contact kate@thegrogroup.com for more details