

CONFERENCE AGENDA

BUSINESS ADVISORY CONFERENCE



CHANGING GEARS

Bringing together leading accounting and advisory firms who are focused on delivering business advisory services to their business clients.

Thursday 19th – Friday 20th November 2020

Mantra on Salt Beach

Gunnamatta Avenue, Kingscliff, NSW, 2487

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Day 1: Thursday, 19th November 2020

8:30am – 9:00am	Arrival: Tea and Coffee
9.00am – 9:15am	Conference welcome and introductions
9.15am – 10:30am	Practice Benchmarking [Group Discussion] Prior to the Conference, delegates will be asked to complete Benchmarking information / KPIs and together we will analyse the collective performances of the group. We will discuss what is working in firms and what is driving efficiency and profitability. We will also look at what areas are challenging firms.
10.30am – 11.00am	Morning Tea
11:00am – 11:45pm	Business management: Marketing In the unique and exciting session, we will walk through a live case study of a fellow Conference Member, as they have worked with an external marketing professional over the last few months to help them attract new Business Advisory clients to their service. We will review their beginning position and step you through each step of their journey, their pains and their challenges as well as the key business outcomes achieved. We will look at the initial strategy, what technology was employed, how it all happened and what has been the business impact.
11:45m – 12:30pm	Practice Insights - Marketing [Group Discussion] From a marketing perspective, what has worked in your practice, what have you tried that has been successful and what have you tried that has not succeeded? Let's expand on discussion from the previous session and look at what is really happening in your business and what are some strategies you should be contemplating next week.
12.30pm – 1.30pm	Lunch
1:30pm – 2:15pm	Business advisory: Practitioners experiences [Group Discussion] In the session, delegates will share their business advisory experiences? What has happened in your practice? What are the challenges you are facing? What have you discovered that works for you? This session will be an open forum to share different experiences and outcomes in different practices.
2.15pm – 3.00pm	Business advisory: Practice refinement workshop [Group Discussion] In the session, we will build on our previous discussion and workshop some of the successes and some of the challenges practitioners are experiencing. The aim of this session is to collaboratively share what has worked successfully for some practitioners and to learn from some of the challenges of other practitioners.
3.00pm – 3.30pm	Afternoon tea

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3:30pm – 4:15pm

Case Study Review Number 1 - Update

18 months ago we invited a guest client to our Conference to participate as our live case study [Melbourne: Nov 18]. What has happened since we met with Chris? Let's explore Chris's journey and see what has happened over the last few months.

4:15pm – 5:00pm

Case Study Review Number 1 – Learnings [Group Discussion]

What analysis / recommendations would you provide to the client based on what you have heard? If you were Chris's adviser what insights would you share with them? What learnings can we draw from this real case study?

5.00pm – 6.00pm

Refresh for dinner.

6.00pm – 10.00pm

Conference dinner.

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Day 2: Friday, 20th November 2020

- 9.00am – 9.45am** **Business Advisory: Meeting structure**
- In this session, we will pull apart the key aspects of the Business Advisory discussion using the Where – Now – How framework. Where do you get started? How do you ensure your clients are engaged and have buy-in into the advisory process? How do you engage clients in meaningful discussion? How do you deliver value to your clients through your advisory process?
- 9.45am – 10.30am** **Business Advisory: Getting to know our Guest Client**
- Prior to the Conference, we will provide you with an 'Information pack' detailing background on our Guest client. In this session, we will introduce our 'Guest client' who is operating a thriving SME business. You will hear their story first hand and you will have the opportunity to ask questions or clarify areas as we get to know this client.
- 10:30am – 11:00am** **Morning tea**
- 10.45pm – 11.30pm** **Business Advisory: Client Case Study – WHERE [Group Exercise]**
- In this session, we will collectively begin our advisory process through a Group interview of our 'Guest client' who is running a very successful business, but faces a range of challenges across the business. This session will only focus on the WHERE section – WHERE do they want to be? What are their SMART objectives? How will they measure success?
- 11:30am – 12:15pm** **Business Advisory: Client Case Study – NOW [Group Exercise]**
- This session will focus on the NOW – What are the challenges / constraints / issues the client is currently facing NOW that needs to be addressed to enable the business to move forward?
- 12:15pm – 1:00pm** **Lunch**
- 1:00pm – 1:45pm** **Business Advisory: Client Case Study – HOW – Identify / Prioritise Issues [Group Exercise]**
- As a group, working with our Guest Client, we will develop the HOW. HOW will the client achieve their objectives? In this process we will identify a prioritised list of objectives that need to be addressed to enable the business to move forward. In this session, we may review the Force-Field analysis tool to assist in determining, what is the right direction for the business.
- 1:45pm – 2:45pm** **Business Advisory: Client Case Study – One Page Plan + Next Step [Group Exercise]**
- Delegates will work in small groups to develop a One Page Plan (OPP) based on their understanding of the Guest client's circumstances, their objectives, their challenges and what strategies are required for the client to implement to move their business forward. We will collectively review each groups OPP, bringing together a consolidated OPP for our Guest client.
- 2:45pm – 3:00pm** **Conference close**