

# FUTURE OF CHOICE™

## Implement change in your firm - Future of Choice in 90 days

### FIRM READINESS

WEEKS 1-2

- Survey of your business advisory and taxation team to assess their readiness for the FOC and extending their business advisory offer as well as identifying where their training is to be focused.
- Financials analysis using the growth equation of your firm to help you to understand where your results are coming from and to show you where you will make more profit, cash and value.

### VIDEO CONFERENCE

WEEKS 2-3

- We will meet with the owners/leaders of your firm to discuss the FOC, overall implementation and answer any questions you may have.
- Discuss the change management process and your role in that.
- Articulate how to create capacity in your team and the strategy to fill the capacity utilising the FOC tool.
- Finalise any pricing discussions and discuss the engagement terms.
- Outline add-on tools and the value these can create to complement the FOC and your advisory offer.

### PROJECT PLAN

WEEKS 3-4

- Identify your firm's champion/s (those responsible for the implementation and project management).
- Agree on the project delivery dates.
- Arrange the relevant systems access for your team.
- Work through any logistical issues for the project delivery e.g. venues for training day.

### TEAM PREPARATION

WEEKS 3-7

- Suggested pre-implementation reading list provided to your team (if preferred we will arrange the actual books for your team).
- Review the relevant FOC videos.
- Work with your champion to finalise the team training day agenda.

### TEAM TRAINING DAY

WEEKS 7-8

- 1-2 days depending on the size of the team.
- Requires the team to be out of the office'.
- A combination of theory, demonstration and role plays.

### SERVICES MENU

WEEKS 8-10

- Create/update/finalise your team's menu of services.
- Discuss and agree on minimum pricing that will apply for each service.
- Determine the priority services that your team will focus on with clients/prospects.

### CLIENT IMPLEMENTATION

WEEKS 10-12

- Formulate client lists for each CRM in your firm.
- Prepare and account development plan or services matrix for each client based on FOC.
- Complete a growth equation for each CRM on their client base.
- Agree on accountability targets with each CRM.

### MARKETING PLAN

WEEKS 7-12

- Work with your team to determine how to market the FOC to your clients and prospects.
- Provision of suggested collateral to use to promote.
- Provision of relevant videos to promote.
- Assist with launch event if applicable. Additional costs apply if resources required to attend your office.

### CRM CHECK-IN

WEEKS 17-18

- 30 days after go live.
- Seek feedback from team and further areas of training required.
- Conference call with owners/leaders to discuss feedback, progress and refine focus areas (face to face meeting available, additional costs will apply).

### FOLLOW UP SESSION

AS REQUIRED

- Applicable if any CRMs exist outside of group above.
- Conference call with CRMs to discuss individual progress.

### SUPPORT

AS REQUIRED

- Unlimited and ongoing general email and phone support.