

Business Success Solution

Loren Fogelman

BSS

Advisory Meeting Guidelines

- 1. Awareness about the purpose** Why does this matter to your client?
- 2. Define outcome** What's possible as a result of doing this?
- 3. Set the target numbers** Determine the KPI's with your client.
 - a. Sales revenue
 - b. Net profit
 - c. Gross profit
 - d. Monthly recurring revenue
 - e. Customer acquisition cost
 - f. Lifetime value of a client
- 4. Gain awareness** Determine how advisory meetings improve your clients' results.
 - a. Faster
 - b. Exceed expected numbers
 - c. Reduce costly mistakes
- 5. Set your agenda** What topics will be covered?
 - a. Budget
 - b. Forecasting
 - c. Financial literacy
 - d. Review financial reports

6. Service delivery How will you meet and communicate with your clients?

- a. Private sessions
- b. Group meetings
- c. Slack

7. Frequency and Time How often do you meet? How long are the meetings?

8. Investment What is the price for an advisory package?

9. If this appeals to you, and you wonder how to apply this to your firm, then let's talk.

Take advantage of the complimentary **Path to Profits Strategy** Session. We'll discuss how to communicate your value and add advisory services to your firm.

Go to <https://www.businesssuccesssolution.com/letstalk/>

