

Agenda – 14th February 2019

CULTIVATING ADVICE DISCOVERY

Novotel MANLY - 55 North Steyne, MANLY BEACH

	<i>If staying in Manly, consider getting out early for walk, run along the beach, or brisk ocean swim, and then treat yourself at one of my iconic local spots for great coffee, café food - Rope & Anchor, or Hemingway's Cafe, or juice bar/cafe - GroundZero</i>
9.30am	Tea & Coffee on arrival
10:00am	Welcome to Cultivating Advice Discovery Principles of Certainty Advice – The Big Picture – Today’s Objectives – The Community CERTAINTY ADVICE DISCOVERIES <ul style="list-style-type: none"> • Being Consistent, Specific, Methodical • Value, Trust & Flow
11:00am	Leg Stretch/Break/Coffee
11:10am	DISCOVERY CONVERSATIONS <ul style="list-style-type: none"> • Role Plays- Positioning the approach • Scenarios - Identifying Client Value • Frequently Asked Discovery Questions
12.30pm	Lunch
1.15pm	DISCOVERY CONVERSATIONS <ul style="list-style-type: none"> • Mornings’ Learnings • Role Plays, Scenarios - Identifying Client Value • Professionally controlling conversational flow • Frequently Asked Discovery Questions
2:45pm	Afternoon Tea
3.00pm	DISCOVERY CONVERSATIONS & TOOLS <ul style="list-style-type: none"> • Role Plays - Identifying Client Value • CERTAINTY ADVICE TOOLS - De-Briefs, Advice Maps, Advice Paths, Advice Pricing, Terms of Engagement POST-SESSION IMPLEMENTATION SUPPORT & PLANNING <ul style="list-style-type: none"> • Frequently Asked Implementation Questions
4.40pm	Day Wrap up, capture learnings & close
5:00pm	EVENING AT LEISURE IN ONE OF OUR FAVOURITE MANLY NIGHTSPOTS... <i>Everyone is welcome to join our ‘Dutch’ (i.e. we split bills) dinner. We gather at 6:00pm at one of our favourite local spots in Manly. These casual dinner gatherings, where we change seating positions to meet as many members as possible, are the catalyst for valuable relationships and conversations while having a bite and drink with people building similar firms learning from each other’s experiences. Please let us know your interest if you’d like to join us?</i>



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8.30am	Welcome Tea & Coffee will be available onsite	
9.00am	INTRODUCTION <ul style="list-style-type: none"> Welcome, Introductions, Groups, Session Overview... “Three Game-Changing Advice Trends Post Royal Commission - Getting Ready for the Opportunity Ahead” 	
9.45am	2019 PRICING – PRICE MODELLING (Laptops required) <ul style="list-style-type: none"> Pricing Modelling (Case Study - Group Work) Building Price Muscles via Modelling Scenarios 	
10.30am	Morning Tea (provided onsite or recommend <u>Rope & Anchor</u> or <u>Hemingways Cafes</u>)	
11:00am	2019 PRICING – PRICE MODELLING <ul style="list-style-type: none"> Insights, Learnings 	
11:30am	DISCOVERY MASTERY <ul style="list-style-type: none"> Intensive role plays Identifying Value Maintaining Control 	ENGAGEMENT MASTERY <ul style="list-style-type: none"> Intensive role plays Articulating Value Maintaining Control
12:30pm	Lunch provided – (quick bite then plan a leg stretch out front door to Manly Beach)	
1:15pm	THE 2019 PRICE COMMITTEE MEETING <ul style="list-style-type: none"> Group Work – Maximising Insights, Learnings & Price v Value Develop 2019 pricing & advice propositions Minimum Pricing, Breakthrough Pricing per adviser & per firm 	
2:15pm	FOUR VALUE PRICING SCENARIOS – UNDERSTANDING VALUE PRICING VARIABLES <ul style="list-style-type: none"> Stated Value Unique Value Process Value Personality Value 	
3:00pm	Afternoon Tea (working i.e. onsite)	
3:10pm	IMPLEMENTATION REVIEW (Group Work) <ul style="list-style-type: none"> Review 2018 Plans v Reality – Review 2018 Pricing Plans Group Discussions – Price Learnings, Insights, & Obstacles 	
3:40pm	NEXT STEPS & COMMITMENTS <ul style="list-style-type: none"> Individual commitments Buddy Group commitmenst Firm commitments Certainty Advice – Annoucements, Updates, & New Features 	
4.00pm	Close & Drinks at bar...	

