



ANALYSE CREATE MOTIVATE

VUE go further

Segment

Profits

Focus

Taking revenue to the next level

Professional services advisers go through three stages in managing their portfolio of clients.

- Establishment – portfolio building with a focus on client numbers.
- Consolidation – maintaining the portfolio with a focus on retention.
- Progression – improving the quality of clients and revenue.

Many advisers struggle to make the step from Consolidation to Progression and end up servicing a stable group of clients. Revenue growth slows, stops or even undergoes small declines.

Go Further helps advisers who manage client portfolios to re-engage with the portfolio, improve the mix of clients and re-start revenue growth. Advisers start by conducting a diagnostic of their clients portfolio and defining groups for revenue strategy.

Advisers then target pockets of clients on a consistent basis with more advanced consultative revenue strategies including cross-selling, up-selling and cost reduction as well as client interview and exit strategies in your business.



Go Further will help you...

Re-start revenue growth with an established client base. Turn passive client service into proactive client management. Understand the quality of your existing client base.

- Improve client reviews
- Boost cross-sale skills
- Manage margins, costs and fees
- Prioritise growth opportunities
- Define an “ideal client”
- Understand client segments
- Identify problem clients
- Create a revenue strategy
- Better utilise time
- Clarify clients to retain

Focus

The successful warrior is the average man, with laser-like focus.

Bruce Lee

Go Further Workshop Agenda...

CREATE

Vue Consulting's Learning Methodology is called ANALYSE CREATE MOTIVATE, representing the before, during and after stages of a training experience.

The CREATE phase includes our Workshops and face-to-face learning. Go Further's CREATE phase requires the equivalent of a two full days of Workshop time, held as four half days every 2-4 weeks.

The Workshop Agenda itself, covers the following modules...

Part 1 - Client Portfolio Diagnostic

- Review Harvard Business School criteria for segmenting a client portfolio on revenue potential
- Learn and apply the first three growth strategies based on core relationship management skills

Part 2 - Cross-Sales

- Review activities from Part 1
- Learn and apply the fourth growth strategy - Cross-Selling

Part 3 - Margin-Sales

- Review activities from Part 2
- Learn and apply the final four growth strategies based around improving client margins

Part 4 - Review

- Review overall activities and experiences, including complete role-plays and "what if" scenarios

ANALYSE MOTIVATE

See the Vue Consulting brochure for more details on the ANALYSE and MOTIVATE phases of our training.



ANALYSE CREATE MOTIVATE

Go Further is particularly suitable for practices or advisers with...

Multiple products or services

You will learn how to boost cross sales and identify which clients should be priority cross-sell targets.

Large portfolios of clients

You will develop more structured review processes to improve the value of each client to the business.

A focus on "servicing"

You will create ways for service-focused advisers ("minders") to generate revenue and contribute to business development without taking away their focus on client retention.

Many underserviced clients

You will identify the "low hanging fruit" within a client portfolio and where to target revenue strategies.

Multiple service segments

You will revisit your service segments and better determine which clients should be moved between segments to improve margins.

Low per-client profitability

You will update your "cost to service" and understand per-client profitability, to improve decisions on fees and client retention.

A disparate client portfolio

You will quickly see the quality and harmony in your client portfolio and how to improve revenue and focus your efforts.