

FP Advance Partnership Programme

FP Advance are the leaders in transition planning and work with advisers seeking to create a high performance business. The Partnership Programme is a package of services designed to get you and your business focused on results.

Our coalface experience has proven that advisers who work with us in a structured and disciplined way achieve better performance on a range of measures including:

- Turnover
- Recurring income
- Client quality
- Referral rates
- Profitability
- Final sale value
- Client satisfaction
- Work/life balance

Who is it for?

Many clients tell us that staying focused on the creation and execution of their strategic and operational plans has more value than ever, particularly in the current economic climate. Furthermore, they recognize the real value of independent external input into that process. This is exactly what the Partnership Programme provides.

What you receive?

Business Fitness Report

- You will be invited to complete an initial business evaluation
- Your Business Fitness Report will examine a range of metrics and establish the health of your business
- From that we can establish your current position and benchmark progress as we move forward

Quarterly consulting days

- 4 consulting days over 12 months (once approx. every 90 days) to create accountability for delivery against the business plan
- Ongoing input into your strategic and operational planning focused on taking your business to the next level
- Prioritising your business critical activities quarter by quarter

Personal access to your consultant

- Your FP Advance consultant will provide personal access via mobile phone or email

Priority response and bookings

- We promise to be accessible and available for any urgent queries you may have

Introduction to FP Advance preferred suppliers

- As different business issues arise we have created a panel of specialist suppliers in areas including:
 - Practice management
 - Marketing
 - Website design
 - Brand identity creation and refinement
 - Systems and processes
 - Specialist recruitment

Complete access to all FP Advance materials

- All tools, templates and consulting materials are available to you
- Your consultant will recommend and supply these throughout the course of the work whenever appropriate

“Many FP Advance clients are already considered successful within the broader industry and are doing well, however, the nature of business is that things can always be better.”

Brett Davidson, Chief Executive of FP Advance



What value will it add to your business?

- Creation of and ongoing input into your strategic and operational plan focused on taking your business to the next level
- Ensure accountability from you and the other owners/managers within your business
- Add another set of independent eyes to look over and help you prioritise your business critical activities quarter by quarter
- Help and inspire you to achieve the full potential of your business
- Create a structured programme of business development that you can follow over the next 12 months
- Establish where you are at today and measure your progress throughout the year
- Prioritising your business critical activities quarter by quarter
- Personal introduction to the FP Advance network of service providers (as required)

Interested?

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