

FP Advance Transition Accelerator Programme

FP Advance are the leaders in transition planning and work with advisers seeking to create a high performance business. The Transition Accelerator Programme is a package of services designed to help you work through the key fundamentals of transition, putting in place solid foundations for a successful recurring revenue business model.



“If you want to be successful on purpose, this programme can help you get there.”

Brett Davidson, Chief Executive of FP Advance

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

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

Who is it for?

This programme is designed specifically for advisers who recognise the need for business model change and who want to find the missing pieces of the jigsaw puzzle quickly, in a structured way, without starving to death in the process.

It helps advisers develop a clear business strategy, build a renewal income stream and provide a high quality service to their clients 100% of the time.

What does it cover?

Over a 12 month period you will see the following outcomes:

- Clearer business focus
- Meaningful client segmentation
- Differentiated client service propositions
- Sensible & coherent pricing strategy
- Effective positioning of your proposition at the first client meeting
- Simple ongoing service proposition
- Improved systems and processes that support your business model/client proposition
- Scalable business platform
- Conversion of existing clients to the new proposition
- Solid marketing foundations for the future
- Increased referrals from clients and professional connections

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

Ten consulting days

- 10 consulting days will be held during the year to focus on each of the business issues above
- Your strategic consultant will work with you on each core unit to create deep understanding of the rationale behind each step and get you started on implementing it
- Your Practice Management consultant will then ensure that each step is bedded down completely, creating supporting processes and working with any of your support staff

Personal access to your consultants

- Your FP Advance consultants 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

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

What value will it add?

Here is what other clients have experienced:

Jeremy Brett

Managing director, Brett Investment

- *We have increased our turnover in the order of 12%-15%.*
- *Improved efficiency and quality of delivery has meant a reduction in our cost base of approximately 10%. This goes straight onto the bottom line and has improved profitability dramatically.*
- *For me there is only one true measure of client satisfaction; referrals, and this improved noticeably since introducing the new approach.*
- *Our PI insurance premiums reduced by over 50% when we demonstrated our new processes to our brokers and insurers.*

Rebecca Taylor

Managing director, Dunham Financial Services

- *Our conversion rate from enquiry to client is now over 86% and clients are happy to pay as they realise we sell a service not just products.*
- *Profitability has increased by 62%. Where previously we lacked some confidence in what we charged we now no longer have any queries relating to fees.*
- *Our target A & B class client numbers have increased by 87% providing greater reward for business effort.*

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