www.instituteadvisors.com

BUILD A HIGHLY SUCCESSFUL CONSULTING & ADVISORY PRACTICE

10889NAT

DIPLOMA OF BUSINESS ADVISORY

The **10889NAT Diploma of Business Advisory** is Nationally Recognised Training by the **Australian government**

Nationally Recognised Training

Est. 2009

Institute of Advisors

Institute of Advisors

LEARN THE SKILLS OF HOW TO BECOME A SUCCESSFUL BUSINESS ADVISOR

Learn from expert advisors from around the world. The Institute of Advisors was founded by experienced Business Advisors who wanted to create a practical curriculum to increase the standards of Business Advisory around the world. The academic panel includes recognised thought leaders from around the world.

The Institute of Advisors is a Australian government registered training organization (RTO 91675). The Institute delivers nationally recognised qualifications, that are flexible, self paced to fit to your busy schedule.

The Institute has chapters in **10 countries** around the world.
Head Office is in **Sydney Australia**

KEY BENEFITS

NATIONALLY RECOGNISED
The course meets the requirements of the Australian Qualifications Framework.

INTERNATIONALLY RECOGNISED CREDENTIAL
Ton successfully completing this module you will also become a Certified Professional Business Advisior and be able to use the certified logo

GOVERNMENT FUNDED
If you live in Australia, you may be eligible for government funding. Get in touch with aour course consultant to check your eligibility and ask for the Australian government funding guide.

CERTIFIED
Professional Business Advisor
CPBA

Receive the CPBA credential on successful graduation

WHAT DOES THE COURSE COVER

- **NAT10889001** - Establish the role of a business advisor
- **NAT10889002** - Design a business advisory practice and engagement model
- **NAT10889003** - Establish effective advisory boards and client review meetings
- **NAT10889004** - Implement business and personal resilience strategies to help clients overcome a crisis
- **NAT10889005** - Provide business advisory services using business technology solutions
- **NAT10889006** - Facilitate business owner exit and succession planning
- **BSBTWK401** - Build and maintain business relationships
- **BSBSTR602** - Develop organisational strategies
- **BSBOPS502** - Manage business operational plans
- **BSBTWK502** - Manage team effectiveness
- **BSBPEF502** - Develop and use emotional intelligence

KEY MODULE LEARNING OBJECTIVES

MODULES	COURSE TOPICS	LEARNING OBJECTIVES
THE ROLE OF AN ADVISOR	| What makes a good advisor? | Characteristics of a good business advisor | Comparison to medical profession/GP | Client Business Lifecycle affects your role | Questions a sports coach asks | Asking Personal Questions – Peter Christman Interview | Mentoring | What do Business Owners Need? | Responsibilities & consequences | Ethics & framework	**By the end of this module, students will have an understanding of** | What makes a good advisor | What skills to work on to be effective | What are the prime requirements of clients
BUSINESS ADVISOR - PRACTICE READINESS & BUSINESS MODELS	| Business Advisory Roadmap | Simple Model Example | How to improve your advisory effectiveness? | Client Monthly Business Review Meeting | The 4 Step Strategy Execution Model | Collaboration based advisory | Q&A Session – Practice Readiness | Making the Leap | Peter Christman Tips | Tips for model effectiveness | Your Strategy | Your Positioning | Return on Investment | Your Business Model	**By the end of this module, students will have an understanding of** | What an advisory roadmap looks like and advisory options | How to structure your practice for success | How to build a process that provides maximum value | How to create recurring revenue and get your messaging right
CLIENT DISCOVERY PROCESS	| How to Conduct a Client Discovery Meeting **Tip 1** – Selling Yourself, Not a Product **Tip 2** – Asking Open Questions **Tip 3** – Establishing Hot Buttons **Tip 4** – Focusing on Value Proposition **Tip 5** – Key Phrases | How to use the Client Discovery Software | Streetsmart Tips – Conducting the Assessment	**By the end of this module, students will have an understanding of** | How to use a discovery meeting to win new clients | How to move away from a financial metric focus and broaden the conversation. | What are the most important skills for maximum effectiveness | Why emphasizing the "value proposition" is so important | How to use the MAUS technology to create professional presentations

KEY MODULE LEARNING OBJECTIVES

MODULES | **COURSE TOPICS** | **LEARNING OBJECTIVES**

STRATEGIC &- BUSINESS PLANNING

Course Topics

- Business Plans are like Rocket Ships
- Quick & Nasty Business Plan
- Business Planning Process
- One Page Strategy
- Competitor Analysis
- Customer Needs
- Analysing Sales Performance and Segments
- SWOT Analysis
- Strategic Direction
- People Alignment and Culture
- Biggest Impact Goals
- Accountability is the Key to Success
- Sample Business Plan
- Assessment Task
- Sample Strategic Plan Client Template

By the end of this module, students will have an understanding of

- What a business plan and strategy is
- How to create a plan for a client
- How to ensure the client stays accountable to the plan

CLIENT REVIEW MEETINGS

Course Topics

- Developing Strategic & Operational Metrics
- Client Accountability
- Balanced Scorecard
- Financial & non-financial
- Introduction
- Case Study – John Smith
- What did you learn from the Case Study?
- Understanding KPI & Strategy Map
- Turning the Scorecard into a Monthly Review Meeting
- Entire Lesson Plan

By the end of this module, students will have an understanding of

- Why strategic metrics are so important
- How to create a scorecard from strategic metrics
- How to conduct a monthly review meeting and in the process establish a platform of success for you and your client

MARKETING & COMMERCIALISING YOUR PRACTICE

Course Topics

- The 7 elements of success
- Commercialization strategies
- Review of each module
- Self-assessment
- Engagement types
- Sample Billing Strategies
- Sample marketing strategy
- Sample marketing checklists
- Sample Marketing Strategies
- Sample Marketing & Building Blocks – Peter Christman
- Your activity
- Your personal blocks

By the end of this module, students will have an understanding of

- How to market their practice
- What makes the difference between successful and failure.
- How to create marketing collateral that explains their services.

COURSE REQUIREMENTS

PREREQUISITES

- There are no pre requisites to entering the Diploma of Business Advisory, but the following entry requirements do apply:
- Entrants to the Diploma of Business Advisory must:
- Be over 18 years of age
- Have at least 3 years' combined experience at a senior management position or as a business owner/manager, OR
- Have been, in the last 3 years, a certified accountant, financial planner, business broker, financial planner, lawyer or otherwise qualified professional
- Have access to two actual business advisory clients in a workplace environment where the business owner can sign off on the student's performance

ASSESSMENT REQUIREMENTS

- Complete readings and case studies on the topic of Business Advisory, coaching and consulting.
- Complete and mark as read all videos and resources, modules and topics.
- Complete the theory and practical assessments.
- The practical assessments involve working with a client to help develop and implement a strategy.
- The theoretical assessments test your knowledge skills.

THE 10889NAT DIPLOMA OF BUSINESS ADVISORY IS NATIONALLY RECOGNISED TRAINING BY THE AUSTRALIAN GOVERNMENT?

Nationally Recognised Training is a formal process to ensure training meets the standard required by industry. You can recognise a program's participation in the process wherever you see this logo displayed.

Those that receive Nationally Recognised Training can be confident that their qualifications are of the highest quality and will be recognised by industry and other registered training organisations in every state of Australia.

Benefits of Nationally Recognised Training for Business

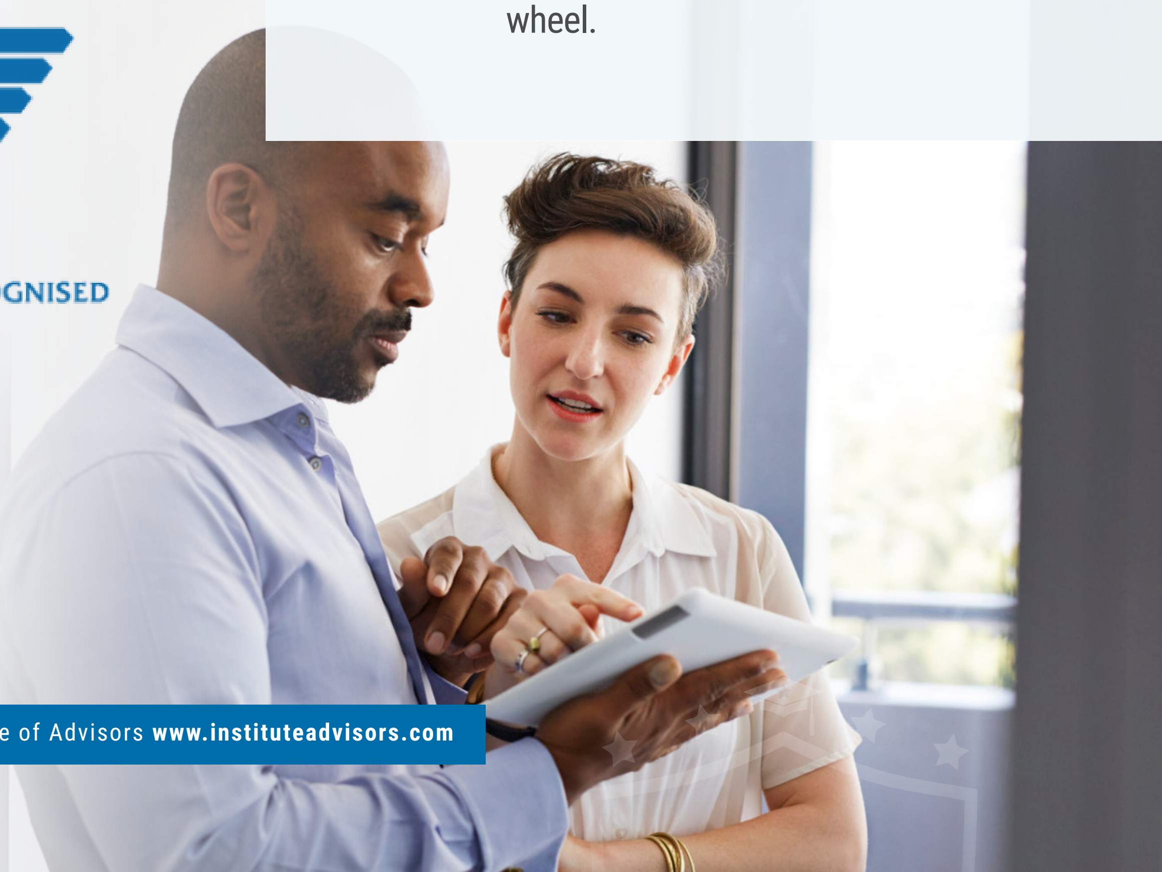
The benefits of utilising Nationally Recognised Training for business include:

- Providing a structured, formalised approach to training recognised by the industry
- Creating industry-endorsed competency standards
- On-the-job training integration
- Providing a competitive edge
- Up-skilling existing employees to keep up with new trends and technologies

NATIONALLY RECOGNISED TRAINING

WHAT MAKES A GOOD ADVISOR

- Good advisors are able to build great relationships with clients.
- Good advisors care about their clients and help them not to feel alone and helpless
- They think strategically and look at the big picture and are great problem solvers.
- They look holistically at the personal as well as the business perspective.
- They help improve longer term efficiency and processes.
- They help the business to stop firefighting and re-inventing the wheel.



WHY BECOME CERTIFIED WITH THE INSTITUTE OF ADVISORS?

- Develop a stronger more successful advisory practice with a respected international credential.
- Stand out from other advisors and display a brand of trust and quality.
- Implement a process in your practice that has been developed over 30 years in conjunction with leading advisors from around the world.
- Ensure your advisory services are professionally driven and lead to positive client outcomes.
- Become a part of both a global and hyperlocal network of leading advisors

WHO IS THIS COURSE FOR?

Anyone wishing to build a consultancy or advisory practice targeting small to medium sized businesses

| Accountants / Bookkeepers
| Financial & Wealth Planners
| Business Advisors
| Consultants and Business Coaches
| Ex Business Managers
| Ex Business Owners
| Professional Advisors – such as M&A, Business Brokers and Lawyers

HOW DOES THE COURSE BENEFIT NEW START BUSINESS ADVISORS?

"I knew I wanted to start an advisory practice but didn't know where to start and thought I lacked the credibility.The Certified logo gives me credibility & joining the local chapters makes me feel like I am not alone anymore."

Credibility & Marketing - Independents such as ex business managers and owners make great business advisors. However, independents often feel alone when stepping away from a field they have been in for an extensive amount of time and starting a new career. They don't feel confident and lack credibility that then impacts on their marketing. Our Advisory Certification program was designed from the ground up by successful advisors from across the globe. The accreditation will give anyone that is starting a new practice instant credibility and a step by step process to market your practice.

Community & Partnerships - Stepping into the world of advisory can be lonely. Our community of advisors allow you to mix with other advisors, network with them, receive and give referral work and continuously self develop. The Institute of Advisors has certified advisors across the globe with online and face-to-face events running frequently to further exp[and your knowledge and network.

Don't Want to Reinvent the Wheel - Independents often lack a detailed plan when they step into the advisory space, they want to implement a system but don't want to re-invent the wheel.Our Advisory certification program gives you a step-by-step guide to establishing and implementing your advisory services and developing a business model that you can scale, leverage and grow.

WHY CHOOSE THE INSTITUTE OF ADVISORS

The Institute of Advisors was established in 2009 and is the **leading global** body representing **business advisors and consultants** around the world. We run certification courses in over 10 countries around the world and are leading the way in setting a worldwide set of standards.

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Est. 2009

ENROL TODAY!

Commence your NAT 10889 Diploma of Business Advisory with the Institute of Advisors today to take the next step forward in your career.

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PRACTICAL

- Courses developed with insights from successful advisors around the world
- Learn from professionals using real world case studies

RESOURCES

- Receive access to tools and templates to help you start your practice.

FLEXIBLE

- Course can be done whilst working full time
- Fit study around work, family, life.

SUPPORT

- Dedicated team of trainers and support staff on hand to guide you
- Up to date, easy to understand course materials