Management, Leadership & Skills courses

Building a World Class Advisory Practice

QUESTIONS & ANSWERS

Introduction

The CIIs **Management, Leadership & Skills courses** have been carefully designed to equip attendees with the skills and knowledge needed to thrive in a professional environment and strengthen their business practices.

Financial advice business leaders face multiple calls on their time and resources and they have many roles to fulfil, especially if advising clients while leading a team.

The **Building a World Class Advisory Practice** programme is specifically aimed at helping business owners and leaders by creating some space to focus on growing and developing their business with structured and practical support.

Who should attend?

Financial advice business owners, and those in leadership roles within professional advisory practices that have been actively trading for 5 years plus. Those seeking to turbo charge their business growth and / or wanting to maximise their business value for a potential business exit in the near future.

The course would be suitable for single adviser businesses through to practices with 30+ advisers and a total staff of 200+. The Trainer can tailor thinking and narrative to suit the audience.

What are the course timings?

The programme begins with a **virtual 'Kick-off session'** at **10:00** (UK) and will last approximately 30 minutes.

There will be an additional **4 x Face-to-Face sessions** which will be delivered between **09:30-16:30** and will be held at the **CII Offices: 20 Fenchurch Street, London, EC3M 3BY**.

Please note that lunch and refreshments are included within the Programme.

The **final review session** will be held online and will last approximately **30 minutes**.
You will be allocated a time slot by your Trainer for your final review session during the Programme.

For the exact course dates relevant to your cohort, please refer to the booking confirmation email sent to you by the Training Team, or please refer to the **Building a World Class Advisory Practice** course webpage, which will be updated according to the current cohort.

What will each session cover / Agenda?

Our face-to-face sessions are fully interactive and engaging. They will include tutor-led discussions, and group break-out work / activities.

Building a World Class Advisory Practice – Course Agenda

Session 1

Why Elephants Child – meet the elephant in the room
Course Overview
T-shaped Professional Practice Model
What's in it for me?
Culture
DNA for success
Self-Assessment
Sack and Stress
Value – Stop the show – Ambition – Aspiration – Why?
Summary, conclusion and set next steps

Session 2

Re-cap - building a world class advisory practice
Growth Strategies
Business Performance
Creating value
Performance Enablers
Lean Technology
Financial Management
Management Information, owning the story in numbers
Summary, conclusion and set next steps

Session 3

Re-cap - growth strategies, business performance, financial management
Influencing Relationships
Transferrable Skills
Business Owners & Environment, Social and Governance
Market
Macro, Micro, SME and Financial Planning
Introduction to planning
Why plan?
Summary, conclusion and set next steps

Session 4

Re-cap - relationships, skills, the market and a planning introduction
Strategic Intent
Three Year Strategic Plan
Spokes to Numbers
Strategic to Action Planning
Themes and Objectives
The Annual Action Plan
Ownership, Accountability and Responsibility
Summary, conclusion and set next steps

Are there any materials / texts provided with the course or is there any additional work required outside of the course hours?

Training materials are providing during the course. There is no preparatory work required however you will be encouraged to complete key elements of your business plan outside of the Programme sessions.

What if I cannot attend one of the sessions?

Our Programme are designed to be fully interactive whether online or within a face-to-face classroom environment.

If you are unable to attend a face-to-face workshop, we can organise for the session to be recorded. We will then share the video recording link with you, to view following the session. You will need to let us know in advance if you are unable to attend any of the sessions, so this can be arranged.

Your trainer will also ensure that you are brought up to speed, if you do miss a session.

What if the course dates are unsuitable or the course is full?

Spaces are limited for each training course. Once a course becomes full, those dates will no longer be available for booking and a new set of dates will be published.

If you are unable to book a place because the course is full or the dates are unsuitable, please complete the Register your interest form, stating what course you would like to attend, and we will advise you on the next available dates.

How many spaces are on the course?

The maximum number on each course will be 15-20 Delegates. This is to ensure the greatest levels of participation and interaction between the Trainer and the Delegates.

Who are the trainers?

Our training courses are delivered by carefully selected trainers and subject experts. Each trainer has been selected for their extensive knowledge and experience.

Building a World Class Advisory Practice will be delivered by a subject expert from Elephants Child who are a leading, specialist, SME growth advisory firm. Specialising in the SME market they focus on five key client outcomes: growth, funding, exit, turnaround & ESG.

What are the system requirements to join the online sessions?

Our online training sessions are delivered through Microsoft Teams or Zoom and your joining instructions will provide further details. Please ensure that you have the necessary app or software installed before the training session. Please refer to the Zoom system requirements here / MS Teams here

How much is a place on the courses?

£995 for CII/PFS Members, £1095 for non-members

What are the details for additional ongoing support?

Elephants Child are able to offer additional 'ongoing support' following this Training Programme.

Additional costs apply for the optional coaching programme – details below:

CII / EC Financial Reporting & Plan Management	£59 per month
ESG Audit & Evaluation	£1,000
Bespoke/ Private Business Planning	£3,895
Strategic Advisory Board Support	£1,995 per month

Can I use the Training workshops towards CII qualifications, and will I get any certification from completing the Course?

The Management, Leadership & Skills courses are not part of the CII qualifications framework but can be used towards CPD requirements.

How do I book a place on a course?

To book your place on any of the Management, Leadership and Skills courses, please complete our booking form, or email to business enquiries business.enquiries@cii.co.uk

If you would like to speak to our Customer Services Department call: **+44 (0)208 530 0806**.

Can my employer / company pay for my place on this course?

Corporate Orders

If your employer/company has an account set up with us, they can arrange for a Corporate Order to be processed through their Corporate Account. Your employer will need to provide their COL Account ID, along with the PIN for the person who wishes to attend the course. If no PIN is available, we will require the Delegate's **full name, address, email, DOB and telephone number** to set them up on our system. Please email new booking requests to your CII Relationship Manager or business.enquiries@cii.co.uk.

Please note, if your employer has a **group** of candidates seeking Training on a particular subject or exam preparation, it may be possible to arrange an in-house training course. Please contact training@cii.co.uk for more details or for general enquiries business.enquiries@cii.co.uk.

Credit / Debit Cards

Card payments are taken over the telephone via our Sales Processing Team. Payment can be made using a card registered to yourself and your employer may agree for you to reclaim the cost of your course through your expenses. After your purchase, you will receive a payment confirmation via email when you book.

What happens after I book?

Once you have placed your order, your booking will be processed, and you will receive a booking confirmation email. You will then receive a second email from the Training Team, containing the joining instructions for the course, at least a week before the start of the course.

Can I change my mind/cancel?

Should you need to cancel your place on the course, please contact Customer Services Team on: **+44 (0)208 530 0806** at least 14 days before the course start date.

Are you offering any other Training Subjects?

We intend to add new courses to our Training calendar regularly. Keep an eye out for new courses by visiting our training pages on our website and social channels for updates on new courses.

We would be keen to receive any recommendations for future courses which you may like to attend. This form can be used to assist with registering your interest: Click here.

Feedback after the session

We value your comments and suggestions and encourage you to provide us with feedback after attending any of our Training courses. You will receive an email at the end of the course, containing a link to complete an online Evaluation Form, which is reviewed by our Training Team.

What if I am unhappy or want to make a complaint?

Complaints are to be directed to complaints@cii.co.uk, which will be reviewed by the appropriate team.