The AUPFS Practice Development Program

"Our objective is to help you build a more profitable practice"

General Business Planning	Helps you define your long term vision for your practice, and then works backwards to develop the plan which will reliably help you achieve that vision
Client Segmentation	Guides you through client service & fee differentiation concepts, and how to determine in which segment each client should be allocated
Marketing Diagnostics	A 36-point review & re-calibration of your marketing activities & plans
Sales Skills	We critically assess what you say – and how you say it – in your meetings with clients & prospects
Seminar Presentation Skills	How to present seminars in a more compelling and concise way – and avoid the big mistakes – and so increase your conversion rate to appointments
Lead Generation Strategies	Which strategies will generate the most high quality leads… and create the greatest efficiencies for you
Referral Relationships	How to initiate, develop and manage strong & profitable referral relationships with accountants
First Interviews	A proven meeting structure which enables you to build rapport, impress the prospect, and gain approval from genuine prospects to proceed to the next stage
Client Referrals	A 5-step process to help you routinely win client referrals from prospects and clients – even after your very first meeting with a prospect
Value Propositions	We help you develop a compelling answer to the question: 'Why should I become your client?'
Xplan training	A one-on-one assessment and education process to ensure your back office is running as efficiently as possible
Xplan development & customisation	We can tailor aspects of Xplan to match the unique requirements of your back office to further improve your efficiencies
SOA improvements & training	How to use our tools to ensure you prepare your SOAs as efficiently as possible to save you time and effort
Practice positioning	We critically assess how you answer the question: 'What do you do?', and look at how you could improve the way you & your practice are perceived by clients
Pricing on value	Helps you position your fees based on how much value you add to the client rather than on the amount of hours you accumulate
Transitioning FUM to our platforms	A specialist team will assist you with the administration and client education required to move your clients onto a more appropriate admin platform
Business Succession Planning	We'll help you plan for your exit from your practice… and advise you on the requisit improvements you need to make to maximise its sale price
Acquisition Advice & Implementation	Assessment of the opportunity and pricing, as well as analysis of the processes, compliance and accounts, followed by assistance with the integration into your practice
Business Management 101	A lesson in management accounting including forecasting revenue, expenses & cash flow