

CERTAINTY INNOVATION DAY

Thursday 17th March 2022

EXCHANGING PROGRESS OF ADVISORY TEAMS
SESSION OBJECTIVES & QUESTIONS

EXCHANGING ADVISORY TEAM PROGRESS

SIGNIFICANT LEARNING & DEVELOPMENT OBJECTIVES***:

Participating in this session aims to maximise the probability that participants will...

Kinds of Learning

LEARNING OBJECTIVES

Foundational knowledge

(limited to what is considered really important to retain)

Understand the variety of business models, structures, advice propositions and returns being achieved by Certainty Advice teams

Application

(what is it we want participants to be able to do six months on?)

Improved the productivity, teamwork and careers of advisory team members while accelerating returns for advisory firms

Integration

(what connections will participants make with other areas of their professional lives?)

Increase the connection and relationships with other advisory teams implementing Certainty Advice and with other third-party providers that may complement future progress

Human Dimension

(what have participants learned about themselves or how they interact with others?)

Reduce any isolation or implementation anxiety to increase the confidence of every advisory team implementing Certainty Advice

Caring

(demonstrating an increased appreciation for the subject matter)

Greater use of the growing network of Certainty Advice teams to deepen understanding of implementation progress, hurdles and returns

Learning How to Learn

(becoming a self-directed learner)

By hearing how other advisory teams are advancing, increase increased focus and attendance at on-going community and theory sessions to further the delivery of valuable advice.

