

CERTAINTY INNOVATION DAY

Thursday 17th March 2022

FROM PERSONAL TO SME ADVICE
SESSION OBJECTIVES & QUESTIONS

FROM PERSONAL TO SME ADVICE

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 reasoning, advice transition paths and returns being taken by Certainty Advice teams incorporating SME Advice business models

Application

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

Determine the applicability, interest, returns and opportunities of expanding advice services into the SME market

Integration

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

Increase the connection and relationships with other advisory teams (and potential third-party providers) implementing SME Advice for Certainty Clients.

Human Dimension

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

Better understand and potential when advisers provide valuable project management, client management and strategic management advice beyond technical expertise

Caring

(demonstrating an increased appreciation for the subject matter)

Identify specific SME advice niches that align interest, returns and progress for advisory teams

Learning How to Learn

(becoming a self-directed learner)

Interview, research and understand the specific opportunities for SME Advice within identified SME Advice niches.

FROM PERSONAL TO SME ADVICE

GROUP DISCUSSIONS

- What percentage of your new or existing clients are involved with a SME?
- What is the biggest insight advising SMEs compared to advising non-SME clients?
- How did you start your work with SMEs?
- What do you enjoy most about working with SME clients?
- How do you manage/work with third-parties involved with SME Advice?
- What breakthroughs are being achieved in your SME Advice work?
- How would you advise others here today who are acting as project managers for non-SME clients if they are considering an expansion into SME advice niches?
- Anything else?

