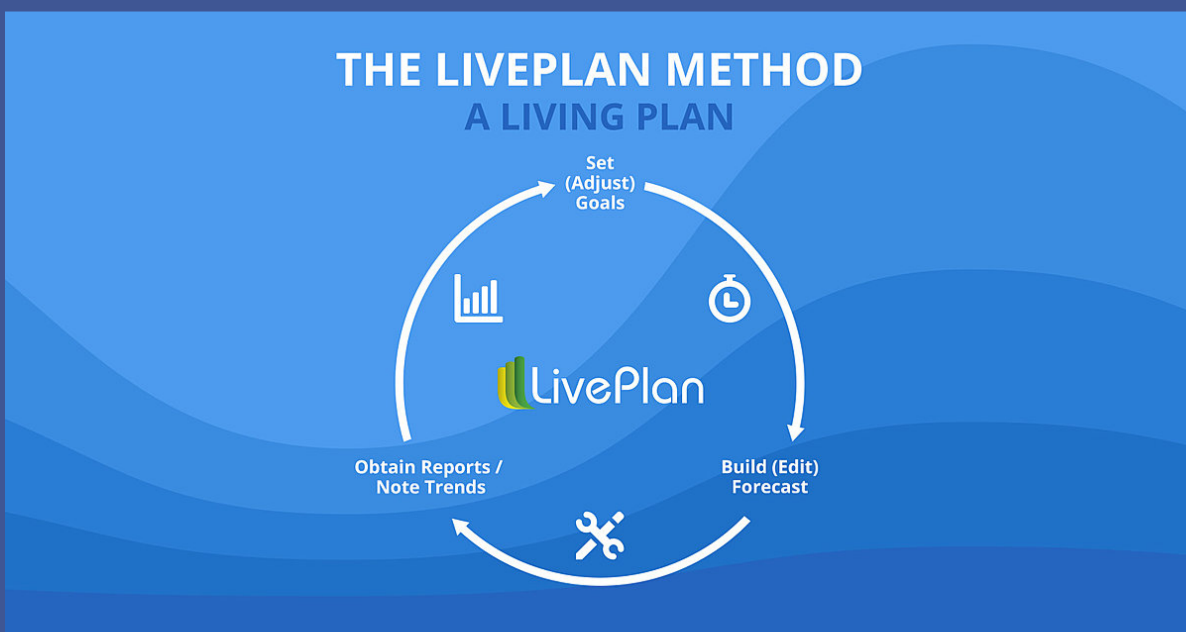
LivePlan by Palo Alto Software

Client Kickoff with The LivePlan Method



A collection of recommended steps to kickoff your Strategic Advising right.

Client Kickoff - The LivePlan Method

Steps for a full proof client kickoff in Strategic Advising.

Scoreboard

Use the Sync feature of LivePlan to pull up to three years of historical accounting data into LivePlan's Scoreboard. Use this history to show your client the impact of Key Performance Indicators.

Tip: Prepare two items of feedback for each KPI.

Benchmarks

Use LivePlan's powerful Benchmark module to populate your client's real time benchmarking metrics and show those against their actual data.

Tip: Explain each metric to the client, and how you will work with them to develop a roadmap to measure against: a lean financial plan.

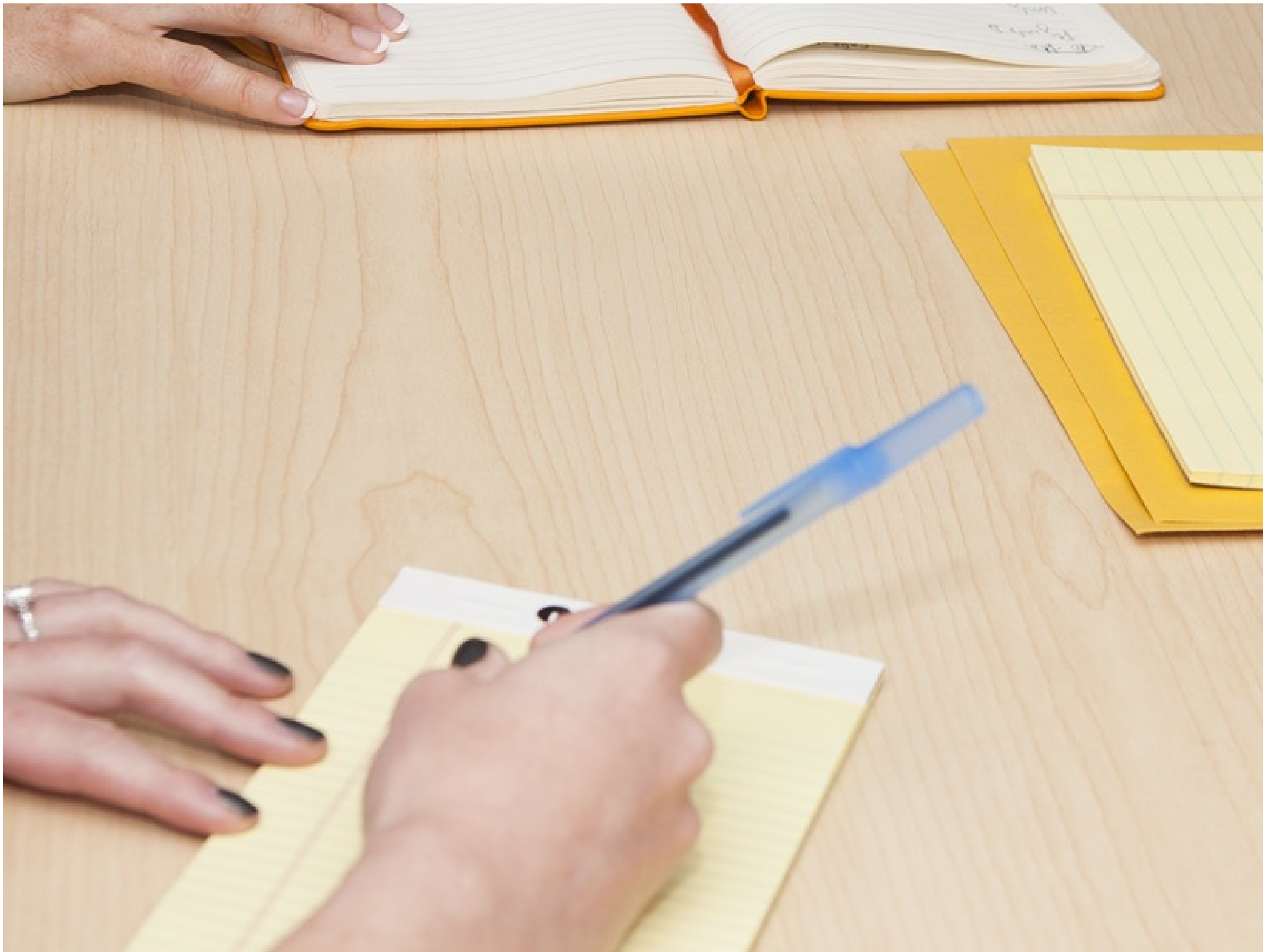
Pitch

Use LivePlan's step-by-step Pitch module to conduct a comprehensive interview with your client to understand their business model.

Tip: Be sure to cover Partners and Resources - often hidden revenue streams!

Client Meeting

Conduct an in depth client meeting to understand the client's true business goals and their unique potential. Use the client's historical data to show the story of their past to date, and then explain the value-add of strategic planning.



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