

clarity.[®]



The Business Improvement Summit

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Generate quality and qualified leads from clients and prospects for your business advisory services!

Welcome to *The Business Improvement Summit* - a half-day workshop created by Clarity on behalf of our accounting members for their clients and prospects.

This hands-on workshop is designed specifically for small business owners and entrepreneurs who are facing challenges in growing and managing their businesses.

You are the very worst person to sell you! Let us promote and showcase the firm's expertise and what you can do to help small businesses while generating leads for your business advisory services.

By attending this summit, small business owners and entrepreneurs will have the opportunity to learn from you, experienced business consultants and other professionals who will provide them with valuable insights and knowledge that can help them make better decisions for their businesses.

The Business Improvement Summit is an excellent way to promote your brand while offering valuable resources and knowledge to your clients and prospects. Our hands-on learning approach provides attendees with practical exercises and activities that can help them apply the knowledge they gain to their businesses. They will also address specific challenges they're facing and receive targeted solutions and strategies that are tailored to their individual needs.

By attending the summit, small business owners and entrepreneurs will have the chance to connect with you and like-minded individuals facing similar challenges, leading to valuable business connections, partnerships, and collaborations that can help them grow their businesses.

During the workshop, attendees will learn about the challenges and issues facing small businesses, the 7 reasons why small business owners fail to scale (and, more importantly, what they can do about it!), and a practical session to understand where they are now, where they want to get to in business, and what's stopping them. They'll leave the summit with clear next steps to implement in their businesses, making a tangible difference in their day-to-day operations.

The main call-to-action is intended to be a Clarity Session for attendees, with one of your team. The Clarity Session can be free of charge or could be priced at say \$795/£695/AU\$995. You will certainly want to put a value on the session and maybe offer it free to those who sign up on the day.

The aim of the Clarity Session (following our process) is to highlight potential profit and cash improvements, co-create an initial action plan to show what you can do to help the client (or prospect) and agree on the next steps - which will likely include availing of your business advisory subscription service.

Join us in hosting your own *Business Improvement Summit* to showcase your firm's expertise and generate leads for your business advisory services.

Anticipated timings

A typical event runs along the lines of:-

Registration and coffee at 09:30
Session 1 starts at 10:00
Coffee Break 11:15
Session 2 starts at 11:45
Lunch 1

Of course, we are flexible, and the timings can be changed as required. Some members have included slots for sponsors to speak. Others have combined with other events, such as client awards or drinks afterward.

Numbers

While numbers are completely up to you, to maximize the opportunity, ideally, we would expect you to want 50 or so there. If you can get more – even better! Quality over quantity is key.

Venue

The venue is vitally important, as are the refreshments and lunch. They all need to be reflective of your business advisory offering and, indeed, the prospects you are looking to attract.

As this is a hands-on workshop, it is better to have classroom or cabaret seating, which may limit venues. Please bear in mind that theatre style is the least attractive option.

However, again, you can flex this. Please speak to us about the various options.



Promotion

We expect you to need at least 6-8 weeks for the promotion of the event. With planning required on top of this, it is likely that you would need to book the event with us with at least three months' notice.

You also need to bear in mind the required follow-up, meetings, and work subsequent to the event. This must fit in with your workload. You will also need to consider various holiday periods.

We would expect you to have clients AND prospects there. You may want to get involved with local banks/attorneys or solicitors/wealth management firms etc Some accountants have worked with local NatWest Accelerator programs. Others have got sponsorship from other accounting software or apps, such as Xero.

Bear in mind that we are there to represent and promote you (not Clarity). So we will not have an issue with other technology apps with stands and/or speaking slots.

You should also see how many small business owners sponsors could invite.

Call-to-action / outcome

We would work out the offer/call-to-action with you and “push” this and your services and expertise throughout the event.

As stated we would anticipate this to be a Clarity Session for attendees, with one of your team. The Clarity Session can be free of charge or could be priced at, say, \$795/£695/AU\$995. You will certainly want to put a value on the session and maybe offer it free to those who sign up on the day.

Marketing

Marketing the event will be your responsibility.

However, we can of course, assist you with anything we can, such as copy, logos, visuals, landing pages etc

It is likely that you will want to put a ticket price on the event. A price such as \$57/£47/AU497 is not unreasonable. It helps with no-shows. You can, of course, use discount codes and offer free places. Working with a local bank or sponsors to help generate interest and boost attendance is certainly helpful and reduces the pressure on you.

If you don't have a reliable CRM and are unable to create landing pages and take payments you may want to consider Eventbrite.

You will need to promote on your website and social media channels, send out numerous emails and special invites, and follow-up (generally on the phone) is essential.

Speakers

Aynsley Damery or Steven Briginshaw from Clarity will run the event on your behalf (Aynsley's speaker pack is available if you would like a copy).

A member of your team will likely host the event - do the introduction, compère, and end with the 'thank you's'. We can, of course, do this for you if you prefer.

Your team should be there to circulate, assist with the workshop sessions, network, and take bookings for the call-to-action.



Making the most of the event

It is important that you minimize the follow-up required after the event. Inevitably, there will be some.

We will work with you in advance and on the afternoon of the event to make sure you maximize the opportunity.

Workbooks for attendees will be made available to you (with your branding) via PDF, and we would recommend that you print and bind them in color if possible.

You should ensure that diaries are checked and cleared and specific slots are available to meet with leads after the event. And that the team is able to book these in on the day. Use Calendly or similar to schedule.



Make sure to take plenty of photos and videos and get testimonials - so that you can promote it after the event.

Cost

We are here to support our members. So, the cost of Clarity providing the speaker for the event, travel time, meetings beforehand, and for the afternoon of the event is at the very special discounted rate of £2,750* plus expenses.

There is a 40% non-refundable deposit payable on booking the event. The balance (again non-refundable) should be paid in full at least 30 days prior to the event.

We will bill for reasonable expenses as incurred. These will include but are not limited to, for example, Aynsley requiring return flights from Malaga to your closest airport, transport from the airport to a hotel near the venue, a two-night stay at a hotel, and meals. Steven will require train transport within the UK and flights outside.

In the event of unforeseen circumstances that require the event to be moved, we will do our very best to facilitate any move. This cannot be guaranteed, however, and it would need to be rescheduled within a 90-day period. Additional costs and expenses may be incurred as a result.

Book now!

The ability for us to run events like this is limited, and hence, the slots available are too.

Please get in touch with your Clarity contact to discuss availability and make a booking.

What accountants say

Sometimes, you have to cut through the noise!

We all are guilty of getting too heavily embroiled in the day-to-day, and sadly, after getting excited about change, we quickly return to our normal working day, and SHOCK, nothing changes.

We saw the Business Improvement Summit as a TRANSFORMATIONAL opportunity for us and our clients.



IT WAS, and we had huge success. Not only did we have a full room of around 50 people, we raised £1,000 for the charity Tiny Lives (all money raised went here), and we had meetings with all bar a couple of business owners by way of follow-up with several of these now signed up as, what we call 'Transformation' clients. All in all, it generated about £68,000 worth of fees!

These clients are seeing year-on-year growth, with one business owner seeing their business value grow from £30k to £3 million in a matter of a handful of years.

The event itself got some incredible feedback, including "life-changing, insightful, and not like anything we've seen or heard before."

Our clients now see us as something very different from what they once expected from an accountant.

Graeme Tennick

We generated approximately £82,000 in fees within three months, and it's still going strong!

The event was amazing and cemented my position in the local area as an accountant who does things differently, helps small business owners succeed, and someone to talk to. The event generated fees beyond those who attended!

We had approximately 35 business owners there - a mix of clients and people who I have been chasing for years. And I booked meetings with almost every one. I even got a meeting booked from someone who couldn't attend at the last minute. We got a few sponsors involved, local businesses, and even Xero!



The event was seamless, and the support we got from the team and Clarity was second to none. They content was brilliant and they positioned me as the go-to person to help small business owners. They did a far better job of promoting me, better than anything I could have ever done.

What are you waiting for!? Book your Summit today and start to grow your firm.

Sharon Baker

Examples of visuals

