



**ADVISOR 2 ME**

PARTNERING IN YOUR SUCCESS

# QUARTERLY COACHING



## WHY DID WE DEVELOP THIS SERVICE?

- » At times as a business owner do you feel alone and unsupported?
- » Do you find it difficult to make time to work on your business rather in the business?
- » Are you keen to find out new ways and strategies to improve performance and overcome business challenges?
- » Would you value having a regular forum with an independent third party to discuss your burning issues and opportunities?

We appreciate that owning your own business is hard work; the purpose of Quarterly Coaching is to provide you with accountability and support to keep you on target towards achieving the goals you have set in your business plan.

We will ensure your business plan remains a live working document and is a filter through which all decisions are made.



## WHO SHOULD ATTEND?

If you are passionate about your business performance and want to achieve your goals then we recommend this service to you.

Quarterly Coaching gives you dedicated time to make better business decisions, using the best information and with support from your Coach.

We will hold you accountable for your actions and ensure that you reach your targets.



## WHAT IS INVOLVED?

This coaching program consists of quarterly meetings, with one of our senior team members plus phone and email support.

The purpose of each meeting is to review your actual results, clarify areas where you can improve your business performance, set 90 day goals and identify strategies to achieve them.

As a result of each meeting you will develop a realistic 90 day action plan with timelines to keep you on track to achieve your Annual Business Plan.

You will have unlimited access to our expertise, seminars and resources to enable you to implement the best business practice.



## WHEN SHOULD I HAVE A SESSION?

Ideally Quarterly Coaching takes place once you have completed a Business Plan, so it becomes the guide against which all operational and personal decisions are made.

However, the Quarterly Coaching program may also be used as a vehicle and guide to work through major changes in your business circumstances.



## BENEFITS

- » Increased accountability and support from your Coach to enable you to achieve the results you want
- » Increased profitability and cash flow
- » Customised reporting templates to measure and review your actual performance against the budget/forecast
- » Understanding the key drivers of your business and what impacts them
- » Identifying and solving your burning issues
- » An expert sounding board, so you can discuss your ideas and the impact of these prior to making any decisions within the business
- » Improved business performance by identifying ways to overcome challenging issues
- » Keeps your Business Plan as a “living document” to ensure you are working towards your goals
- » Alignment amongst the Directors in terms of prioritising what projects are important (if applicable)
- » Access to the collective wisdom of our accountants - our systems, products and services



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**FREEPHONE 0800 555 012**  
or email [info@advisor2me.co.nz](mailto:info@advisor2me.co.nz)

**DDI +64 9 265 2657 | FAX +64 9 265 2656**  
2G Amara Place, Botany, Auckland