

**VFD Mastermind Programme**

# **Delivering Scalable Advisory & Fractional CFO Services**

**Training, Coaching, Mentoring with Practical,  
Hands-one Exercises to Perfect your Skills in  
the Four Areas Critical to your Success:**

1. Building a Prospect Pipeline
2. Converting Prospects into Clients
3. Delivering a Fantastic Client Experience
4. Retaining and Growing Clients



virtual  
finance  
director

## Introduction

The VFD tools and related support are designed to provide you, as an accountant in practice, bookkeeper, or a CFO, with all the resources and the support network you need to deliver high-value **Advisory and Fractional CFO** services for businesses and their owners.

This document provides an overview of the **VFD Mastermind Programme** and options, including the programme structure, training, coaching and mentoring support, group and individual learning, including practical assessed exercises.

Whether you are:

- An Accountant in Practice looking to add value to compliance only clients
- A CFO working to deliver greater value, increase capacity and acquire more clients
- Looking to scale **Advisory and Fractional CFO Services** and build equity value

To deliver **Advisory and Fractional CFO** services you must address two challenges:

1. **Technical:** You must be 100% confident in your technical skills and ability to deliver.
2. **Sales:** Anyone can sell with training and the more you practice, the better you become.

Just think: You weren't born knowing how to drive; but most of us learn and go onto drive confidently every day. What makes learning to driving different to learning how to sell? Nothing...

No-one turns up for their driving test without first learning how to drive, practice and gain confidence.

Eventually you convince your driving examiner you are good enough to pass, (sometimes after a few tries). For most of us, driving soon becomes second nature.

Acquiring the skills to sell and deliver **Advisory and Fractional CFO** is just the same. You need to know the basics, and the more you practice, the better you become.

But your first real prospect is like the driving examiner, only much worse.

With appropriate training, practice and support, it's easy. The **Combined Mastermind Group** is the equivalent of your driving instructor – your **Advisory and Fractional CFO** driving instructor.



Let's begin.

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## Your Challenge

If you are reading this you are already aware of the challenges facing the accounting profession, some are aware and appreciate the need to take action (i.e. you), most in the profession are naively happy to plough on doing what they have always done.

It's called Marketing Myopia: It happened to the Canal builders whose demise occurred in the late 18<sup>th</sup> and early 19<sup>th</sup> century, with the arrival of the steam train, offering speed, flexibility, lower costs and destinations not accessible by canal. The same happened to the steam train, and to those who built them.

Arguably, controversially in some quarters, the general consensus: change is inevitable for the accounting profession which raises some critical challenges.

- For accountants, compliance and bookkeeping, driven by AI, Fintech and HMRC (MTD), fees will come under increasing pressure with clients expecting more for less.
- How to build new skills to deliver **Advisory and Fractional CFO** services profitably, and how to acquire clients who are happy to pay a fair rate.
- The commerciality to go beyond numbers alone, to become an integral part of your client's management and the confidant, coach and mentor for clients.
- How to systemise and scale delivery of high value **Advisory and Fractional CFO** services, to practice what you preach, building equity value in this part of your business.

**Bottom line:** If you keep doing what you did yesterday, nothing changes, you just get older. To change your results, you need to know the right levers and pull them in the right sequence.

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## The Solution: The VFD Mastermind Programme

**VFD Mastermind Programme** is much more than a simple CPD programme, it's a **complete support ecosystem** designed by highly commercial, strategic CFOs, for accountants, bookkeepers, and CFOs who want to build a scalable **Advisory and Fractional CFO** practice.

The **VFD Mastermind Programme** includes:

- Training, Coaching and Mentoring (commercial and technical)
- A comprehensive suite of tools to streamline and augment client delivery
- Marketing-ready collateral, systems and processes
- One-to-One and peer-group learning, practice and accountability
- An ecosystem of expert providers and referral partners
- Multi-layered support options designed to match your learning preferences

Whether you want help with marketing, (lead generation), or with sales skills (converting opportunities into lucrative client engagements), or with technical mastery of the automation technology, systems and processes, the **VFD Mastermind Programme** is your complete one-stop-shop for scalable **Advisory and Fractional CFO** service delivery.

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## What You Get, the VFD Mastermind Programme

VFD offers you three mastermind options:

### Combined Mastermind:

The **Combined VFD Mastermind Programme** is the most comprehensive support option, bringing together both technical delivery guidance and commercial growth support and mentoring in one package.

It's designed for practitioners who want a complete end-to-end support ecosystem; from positioning and selling **Advisory and Fractional CFO** services through to delivery excellence with tools and client work. With this option, you get both mentoring paths, peer networking, branded assets, and access to all elements of the VFD Pro Mastermind programme.

### Technical Mastermind:

The **Technical VFD Mastermind Programme** focusses on the **delivery** aspects of **Advisory and Fractional CFO** work, avoiding scope creep to ensure you get paid for the value you deliver.

Ideal for accountants, bookkeepers, and CFOs who are confident in their proposition but want practical support using the VFD Pro toolkit, delivery workflows and implementation. This option focuses on making your **Advisory and Fractional CFO** service delivery consistent, and scalable.

### Commercial Mastermind:

The **Commercial VFD Mastermind Programme** focuses on the **Business Development** aspects of building your **Advisory and Fractional CFO** practice, helping you generate leads, sell your services, generate compelling proposals to secure clients effectively.

This is the perfect option if your priority is marketing and building your sales pipeline (of lucrative, qualified prospects), whilst also developing your sales and negotiation skills to successfully win profitable **Advisory and Fractional CFO** work.

Summary of the **VFD Mastermind Programme** options and benefits:

Included benefits:	Combined Mastermind	Technical Mastermind	Commercial Mastermind
	Full Support	Delivery Focus	Sales Focus
<b>121 Coaching, Mentoring &amp; Support:</b>			
Commercial / Client Acquisition)	✓	•	✓
Technical Delivery (CFO Role)	✓	✓	•
<b>VFD Mastery Training:</b>			
14 week (28 hrs) Full Programme	✓	•	•
3 week (6 hrs) Commercial / Strategy only	✓	✓	✓
<b>Practical Exercises with Feedback:</b>			
Commercial & Business Development	✓	•	✓
Service Systems and Process Execution	✓	✓	•
<b>Peer Support Workshops &amp; Networking:</b>			
<b>Commercial:</b> setup marketing systems and master sales skills and processes	✓	✓	✓
<b>Technical:</b> master the use of all the tools, systems, and processes	✓	✓	✓
<b>Regular Group Training:</b> Multiple sessions available each month.	✓	✓	✓
<b>Professional Referral Network</b>	✓	✓	✓
<b>VFD Pro Portal &amp; Reporting Suite:</b>			
Practice Branded Demo Reports	✓	✓	✓
Business Overview Report	✓	✓	✓
Business Growth Model	✓	✓	✓
All Reporting, Forecasting, and M&A Tools	✓	•	•
Suite of Business Development Assets	✓	•	•
30% Discount on VFD Plans & Connections	✓	•	•
Client Advisory Assessment Model	✓	•	•
VFD Business Intelligence Dashboard	✓	•	•
Branded Practice VFD Portal	✓	•	•

## What It Means for You

The tools, training mentoring and support are the enablers, the value lies in the outputs, the benefits you enjoy in the real world:

- **Sell and Deliver *Advisory and Fractional CFO* Services with Confidence:** Command higher fees, with a robust scope, backed by structure and professionalism.
- **Professional positioning from day one:** Use branded collateral and marketing assets to project your *Advisory and Fractional CFO* credentials, even as a solo practitioner.
- **A Joined Up – End-to-End Process:** Generate Leads, Build Relationships, Qualify and Convert, Onboard, Build and Generate Referrals reliably and consistently.
- **Scale your *Advisory and Fractional CFO* Service:** This is the Achilles Heel for most accountants, with the appropriate systems and processes, scaling is straight forward.
- **Part of a Wider CFO Support Community:** No one can be expert in everything, whatever your challenge, access experts and support whenever you need it.
- **Grow as Your Own Pace:** Option to start small, (with just *Technical or Commercial VFD Mastermind*), and “upgrade” to *Combined VFD Mastermind* when you’re ready.

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## How It Works: The Onboarding & Delivery Process

The path from acquisition to confident, competent delivery of *Advisory and Fractional CFO* work services is structured and flexible. Below is a simple overview of the key steps you’ll experience as you implement your Mastermind journey:

1. **Choose the *VFD Mastermind* option that best meets your needs:** Combined, Technical or Commercial depending on your unique situation and priorities.
2. **All the Tools and Training needed to hit the ground running:** Full access to the VFD Pro toolkit and comprehensive foundational *VFD Mastery Training*.
3. **One-to-one mentoring and group support:** Monthly Continual Professional Development training, mentoring (technical or commercial) and support focussed on the aspects that you most want and need to focus on first.
4. **Refine your *Advisory and Fractional CFO* Services:** Define your service options, pricing, proposal documentation, systems and processes.
5. **Marketing and Lead Generation, Build Relationships, Make Sales, Deliver:** Go to market with total confidence, every base is covered from start to finish.
6. **Quarterly Strategic Planning Workshops:** Practice what you preach, develop and execute your plan, reviewing progress, refine your inputs, continually improve.

## Why the VFD Mastermind Group

What makes the **VFD Mastermind Groups** uniquely suited to developing a scalable **Advisory and Fractional CFO** practice is the depth and breadth of expertise and support you receive every step of the way. With multiple training, coaching, mentoring and support, including practical, hands-on assessed exercises – you learn in your way, and at your pace.

Key differentiators include:

- **Holistic approach:** You don't just get software or training, you benefit from personalised, interactive hand holding, mentoring, collateral, commercial, and technical support as part of a likeminded, growth focussed community, all in one.
- **Built for **Advisory and Fractional CFO** Professionals:** designed specifically for accountants, bookkeepers and CFOs looking to grow, scale and exit successfully.
- **Flexibility and Options:** Choose only what you need: technical delivery support, commercial, sales and marketing support, or full-service support (Combined).
- **Turnkey marketing & presentation assets:** Enables you to project a professional, competent image immediately as a CFO starting out in the Fractional role, or as a large firm of accountants adding **Advisory and Fractional CFO** services to your offering.
- **Community and peer accountability:** regular peer-group sessions keep you motivated, provide idea sharing, and support growth.

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## Get Started – As simple as 1, 2, 3...

Ready to take the next step? Here's a logical 3 step process to help you get the most out of the **VFD Mastermind programme** and grow Advisory and Fractional CFO services:

1. Review the package comparison on page 6 and decide which plan fits your current goals or [click here to book a discovery call](#).
2. Start your interactive training, coaching, and support in group, online and one-to-one personalised mentoring to master technical and / or commercial skills immediately.
3. Engage with potential clients from day one by converting conversations into by either upselling and acquiring new **Advisory and Fractional CFO** clients

**Your journey to building a scalable, saleable **Advisory and Fractional CFO** practice starts here.**

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## Investment & Guarantee

**Our commitment to you is simple:** You must be able to hold **VFD Pro** accountable for working with you and helping you enjoy and outcomes described in this document.

Membership of the **Combined Mastermind Group** is by invitation only and is exclusively reserved for:

- Accountants in practice and talented bookkeepers
- Chief Finance Officers (CFOs)
- Fractional CFOs

With just one successful Fractional CFO engagement worth between £24,000 and £60,000+ per annum, the membership fee is structured to cover direct costs while delivering exceptional return on investment.

- **Combined Mastermind Membership:**      **Investment = £499 +vat per month**
  - **Commercial or Technical Mastermind:**      **Investment = £295 + vat per month**
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## 90-Day, 100% Money-Back Guarantee

We want you to succeed, and we want you to be confident your investment will generate a resounding return on investment. That's why we offer a **90-day, no-questions-asked, money-back guarantee** on the **Combined Mastermind Group** membership.

If, after participating in the programme, you decide the strategy isn't right for you, simply tell us within 90 days and we will refund every penny.

**The only conditions are for your benefit, because we want you to succeed:**

1. **Attend at least 80% of the VFD Mastery Training sessions**  
*This requirement is waived if you have previously completed the VFD Mastery Training or alternatively, watch the recordings and complete the simple online assessments.*
2. **Attend the dedicated Commercial & Technical Group Coaching sessions**
3. **Participate in the Technical and Commercial One-to-One Coaching sessions**  
*This is where you will make the most rapid technical and commercial progress.*
4. **Complete at least one Technical and one Commercial practical assessed exercise**  
*Select the exercises most beneficial to your immediate business development goals.*
5. **Document and share your business plan with your Mentor.**  
*A failure to plan is a plan to fail – be clear on the input activities that are critical to your achieving your goals and enjoying your target Return on Investment (ROI), asap.*

**Simple, Fair & Supportive:** If you engage with the programme in good faith, but conclude this isn't right for you, just let us know within 90 days and we will refund your membership fee in full.

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## Appendices

## Appendix 1: What Does Combined Mastermind Group Include?

### One-to-One Support

Group sessions and webinars are excellent for consolidating learning, sharing ideas, and building your support network. But when it comes to applying those concepts to *your* practice, with your clients, and your prospects, your pricing, your positioning and your unique challenges, one-to-one support is essential,

With the **Combined VFD Mastermind Group**, you get the best of both worlds:

- **Technical** one-to-one training, coaching, mentoring, support, and hands-on-assessed practical exercises and your own support hot line for when you need tech support most.
- **Commercial** one-to-one training, coaching, mentoring, support, and hands-on-assessed practical exercises and your own support hot line for when you need sales or marketing support most.

### Key Benefits of One-to-One Coaching

- **Tailored to you or your practice**  
Sessions focus entirely on your goals, your clients, your time scales and your priorities, your progress is 100% governed by you and not the needs of the wider group.
- **Immediate, practical answers**  
Get real-time guidance and advice, or just a friendly, expert sounding board to help address immediate challenges, from marketing and sales to delivering services.
- **Faster application of learning**  
Mentoring helps turn theory from workshops into actionable results you can use straightaway.
- **A confidential space to plan and test strategies**  
Tackle sensitive issues, be that negotiations, client situations and business strategy in a private, confidential, supportive setting.
- **Accountability**  
By investing in time to work on, not in your business each month, you are much more likely to maintain strategic focus and achieve your longer term goals and aspirations.

In short, one-to-one mentoring accelerates your learning and your progress and increases your efficiency, so you get maximum output in the minimum time, helping you realise a return on your investment sooner.

## One-to-One Support: Commercial

**Note:** *Commercial One-to-One Coaching is included in the **Combined and Commercial VFD Mastermind packages** but is not part of the **Technical VFD Mastermind**.*

Commercial One-to-One Coaching gives you direct, personalised support from experts who work *with you* to tackle specific business development challenges in your practice.

This “done-with-you” approach accelerates your development, helps you avoid costly mistakes, and strengthens your ability to attract, engage, and acquire lucrative **Advisory and Fractional CFO** clients.

Group sessions and workshops provide valuable insight, but real growth in the commercial aspects of your practice come from targeted, one-to-one guidance tailored to *your* business and *your* conversations with clients and prospects.

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### Key Focus Areas

#### 1. Lead Generation

Help identifying and generating qualified leads, including prospects for **Advisory and Fractional CFO** services. You will work on practical approaches to establish systems and processes to consistently generate opportunities.

#### 2. Presenting & Converting Propositions

Guidance on how to position your services, present your value proposition, and convert leads into paying clients — helping you close engagements at fees that reflect the value you deliver.

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### Why One-to-One Business Development and Commercial Support Matters

Just like learning to drive, one-to-one support is essential if you want to master the skills required to sell and deliver **Advisory and Fractional CFO** services without making a series of time consuming, morale destroying, expensive mistakes.

Personalised Business Development / Commercial coaching helps you:

#### Step 1: Generate Leads



**Goal:** To generate leads, we focus on two key areas, prospecting and marketing. Prospecting is quick and easy but has limited scale potential, marketing takes more time and investment, but offers greatest potential to scale.

#### Step 2: Initiate Conversations



**Goal:** You never get a second chance to make a great first impression. You must become practiced, comfortable, and efficient in ensuring you’re remembered for the right reasons—not the wrong ones.

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### Step 3: Start Small, Sell Your Sales Presentation



**Goal:** While it is possible to secure a fully scoped Fractional CFO engagement (or other significant sale) in the first meeting (it does happen), consider that a bonus. Your primary goal at this stage is to get your next sales discussion paid for. Once you achieve that, making a bigger sale becomes much easier.

### Step 4: Clarify Client Requirements and Sell It Back



**Goal:** If it is your client's plan, and all you are doing is clarifying to ensure you understand THEIR requirements and what they want YOU to do, getting this confirmed and contracts signed is easy.

### Step 5: Avoid Buyer's Remorse—Follow Up Quickly



**Goal:** After a great meeting, your client will expect rapid progress. This must start before the real work begins, so lead them by being ready to tell them what they need to do to prepare.

### Step 6: Manage Scope Creep—Turn It into Opportunity



**Goal:** Scope creep is inevitable. How you manage it is not a technical skill; it's a commercial opportunity to renegotiate and reset expectations and increase your fee structure.

Regular **Mastermind group** commercial and business development coaching sessions are held online (via Zoom or Teams) and include:

👉 Review progress:	Celebrate successes and hold each other accountable.
👉 Review actions:	Status updates and strategies to overcome challenges.
👉 Agree actions:	Identify the most critical actions for the next period.

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## One-to-One Coaching: Technical

**Note:** *Technical One-to-One Coaching is included in the **Combined and Technical VFD Mastermind packages** but is not part of the **Commercial VFD Mastermind**.*

### What It Is

Technical One-to-One Coaching is delivered by 'been there, done that' seasoned CFOs with both coaching skills and a wealth of practical, real-world, hands-on experience to help you master the tools and processes and deal with the multitude of potential client scenarios.

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### Key Focus Areas

- **Software Tools, Models and Reporting**  
The VFD toolbox is vast, selecting the optimum tools and building expertise is much easier with 'Done with Your' expert holding your hand every step of the way

- **Fractional CFO Systems and Processes**

To optimise the time you need to invest per client, maximise profitability and set the foundations to scale delivery, the systems you use are paramount.

### **Why One-to-One Technical CFO Tools, Systems and Process Support Matters**

The role of the CFO, or Head of Finance as an employee is very different to being a Fractional CFO supporting multiple clients and it is far too easy to overdeliver and become a victim of ‘Scope Creep’ which saps your energy, your time, your capacity and your earnings potential.

From one day to the next you are likely to go from working to turn-around a failing business, into a properly structured Strategic Planning exercise, the tools are the same, the process and the urgency change.

One-to-one technical coaching will help you master every step of the process, and more:

#### **Step 1: Business Analysis – Goal Setting – Strategic Alignment**



**Goal:** Ensure you and your client, including all key members of the management team are aligned and committed to the business’ vision, agreed financial objectives, confirmed strategic priorities. Then the real work can begin.

#### **Step 2: Strategic Planning**



**Goal:** Get all key stakeholders aligned on **what, how, and who:**

- 1) **What** are the key goals (financial and non-financial)?
- 2) **How** will these goals be achieved?
- 3) **Who** is responsible for delivering key goals?

#### **Step 3: Build the Financial Plan – The Three-Way Forecast – Explore Scenarios**



**Goal:** Building on the strategic plan, create a robust financial three-way forecast. This is straightforward when you know how, but easy to get wrong without guidance. We will work closely with you on your first few three-way forecasts to ensure accuracy and confidence.

#### **Step 4: Raise Capital if Needed – Debt, Equity or Grants**



**Goal:** Whether debt, equity, or grant funding (or a hybrid), having a robust plan, both narrative and financial, is critical. With the three-way forecast complete, preparing a proposal and securing blended finance is relatively straight forward.

#### **Step 5: Non-Financial KPIs – As Important as Financials**



**Goal:** A management pack cannot rely on financial data alone. The business must identify the critical non-financial Key Performance Indicators, (KPIs) that input levers that drive the outputs (profit, cash, and equity value).

#### **Step 6: Management Reporting and Collation – Driving Efficiency**



**Goal:** To avoid unproductive, time wasting, energy sapping “talking shop” management meetings. Preparation and process are critical. Directors and managers must provide concise, strategic level reports each month.

### Step 7: Preparing the Agenda and Monthly Workflow



**Goal:** The agenda must focus attention and management decision making on most important decisions first, with the least urgent topics last, with finance underpinning all key decisions and related discussion.

### Step 8: Quarterly Strategic Reviews – Annual Planning and Re-Forecast



**Goal:** To maintain strategic focus and direction, the CFO needs to be ready to reforecast at any time, but ideally planning and forecasting become a regular, annual cycle, commencing in the 4<sup>th</sup> quarter of each year.

The CFO's role is to support the board and ensure alignment, accountability, and execution. If the CEO or MD is unable to perform, the CFO must be ready to take the helm and keep the business on course.

Just like driving, these processes will take time and practice to master and there's always room to improve which comes naturally if you keep refining and keep improving.

In the same way as the **commercial** sessions outlined above, **technical** coaching sessions are also held online (Zoom or Teams) and also include these key topics:

- |                    |   |
|--------------------|---|
| ↳ Review progress: | Celebrate successes and hold each other accountable.    |
| ↳ Review actions:  | Status updates and strategies to overcome challenges.   |
| ↳ Agree actions:   | Identify the most critical actions for the next period. |

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## The Full VFD Mastery Programme

The **Full VFD Mastery Programme** provides the foundations on which the **Combined VFD Mastermind Programme** builds.

Delivered over 14 week, two hours each week, the programme covers the entire VFD suite of tools and related support for clients, from education and analysis through to reporting, review meetings, strategic planning, fractional CFO support, and M&A tools and processes.

### What You'll Gain

Through the Mastery Programme you will learn how to:

- **Delight and retain clients** to improve retention and drive referral rates
- **Increase fees** supported by delivering greater value and client satisfaction
- **Get more referrals** happy clients become your best sales resource
- **Analysis and Reporting** support delivery of a robust Financial Controller service
- **Planning, Forecasting and Reporting** the foundation for Fractional CFO services
- **M&A and Exit Planning** helping client's growth via acquisition, prepare for and exit

- **A Compelling Sales Presentation** convert conversations into lucrative clients

These are essential for engaging and maximising the value of existing clients, to upselling wherever appropriate, and to build a sales pipeline of lucrative potential **Advisory and Fractional CFO** clients.

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## The Comprehensive Suite of CFO Tools

The VFD toolkit is vast, with 26 different tools, reports and financial models, giving you everything you need to deliver **Advisory and Fractional CFO** services.

For accountants in practice and bookkeepers, this represents a shift from looking backward (“what happened last year?”) to helping clients take control of the input drivers of growth and hence take financial control.

For CFOs, it drastically reduces the time spent analysing data and reporting, to invest more time, and deliver far greater value, insight and analysis for clients that has ever been possible before.

### From Analysis, to Insight, to Planning, to Impact

Insight does not drive results, taking the right action does

- Quickly identify the key challenges and opportunities for growth
- Lead commercial discussions that go beyond numbers to drive actions
- Guide your client and their management team to focus on the core actions, those that deliver the greatest impact for the least effort as quickly as possible.

Because results = happy clients, increasing your income, and your referral rates, making your work both highly profitable and extremely enjoyable in equal measure.

### Re-attendance & Ongoing Access

There are five **VFD Mastery Programmes** each year. As a member of the **Combined VFD Mastermind** Group you can re-attend as often as you wish, at no additional cost, supporting continuous development and mastery at your own pace.

**Note:** *If purchased separately, the **Full VFD Mastery Programme** costs £1,796 (or four monthly payments of £449). This is included at no extra cost with **Combined Mastermind Group** membership.*

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**VFD Mastery Programme – [click here for more information](#)**



## Mastery Programme Overview:

Session	Outcomes	Module
Introductions and Value Proposition Business Overview Report Enhanced Business Growth Model	Your objectives and your role Entry Level Management Reporting - ongoing value add Advisory Ready - Unlocking Client Growth and Business Value	1.1
Adding Value - Upselling - Acquisition FiMBO and Exit Planning 101 - Growing Your Numbers Client Discussion Model & Client Discussion Framework	Client Profile: Lead Generation and Marketing Communications Education: Trainer, Clients, Prospects, Introducers Highly Valued Client Meetings - growth potential	1.2
Client Advisory Assessment Model (CAAM) Client Segmentation Model (CSM) - Practice Introduction Pricing & ROI Calculator	Identifying Clients for a Business Growth Discussion Quantifying your Business Growth Potential Strategy and Implementation Action Planning	1.3
Management Reporting and Financial Review Meetings	Management Reporting and Financial Review Meetings	Module
Commercial / Business Development Opportunity Performance Analysis Report Performance Trend Report	Clarify the MR & Review sales / upsell opportunities Business Analysis and Opportunity Identification Business Start-ups and Volatile Trading	2.1
Board Summary Report Board Report Non-Financial KPIs	Performance Dashboard - Monthly Reporting Business Performance - Quarterly Review Meetings Tracking and reporting non-financial KPIs	2.2
Customer Analysis Report & Supplier Analysis Report Opportunity Exception Reports (Customer OER & Marketing ROI ) Opportunity Exception Reports (IP Strategy OER & Patent Box)	Identifying Opportunities and Risks - Customers Identifying Opportunities and Risks - Suppliers IP Strategy OER - Customer Exception & Marketing ROI	2.3
Business Data Model The Business Intelligence Dashboard Client Discussion Framework - Section 7 Scoping and Pricing	Analysis, Bespoke Reporting and Tracking Codes Deep Dive Financial Analysis and Opportunity Identification Pricing and Options	2.4
Planning, Forecasting and Part-Time FD / CFO	Planning, Forecasting and Part-Time FD / CFO	Module
Commercial / Business Development Opportunity Business Growth Model Customer Targeting Model Client Segmentation Model	Clarify the PT FD / CFO sales and upsell opportunities Projecting Growth Potential Gap Analysis and Cross Selling <b>Turnaround and Recovery Services</b>	3.1
Strategic Planning Model Strategic Planning Framework	Capacity Planning, Prioritisation, Accountability Putting it all together - The Strategic Planning Process Systemising the Process of Pre Forecast Growth Planning	3.2
Forecast & Funding Proposal Model (Customer/Nominal)	The 5 Year 3 Way Forecast Model Scenario Planning Sensitivity and the Forecast Report	3.3
Forecast & Funding Proposal Model (Customer/Nominal) Client Discussion Model: Finance and Credit Risk Risk Dashboard - SME Audit Template	Preparing a CAMPARI Compliant Funding Proposal Working Capital and Credit Rating Management De Risking the Business	3.4
Forecast & Funding Proposal Model (Customer/Nominal) The VFD Way Client Discussion Framework - Section 7 Scoping and Pricing	Management Information - Reporting Performance vs Plan The Part-Time FD Workflow Process Pricing and Options	3.5
Exit Planning, Valuations and Financial Due Diligence	Exit Planning, Valuations and Financial Due Diligence	Module
Commercial / Business Development Opportunity EVA Business Valuation Model EVA Financial Due Diligence Report	Clarify the Exit Planning sales / upsell opportunities Establishing an adjusted Business Valuation Financial Due Diligence Reporting	4.1
Consolidation and Exit Valuation Processes Exit Planning 101 intro to Business by Design Client Discussion Framework - Section 7 Scoping and Pricing	The Exit Plan & Reporting Performance vs Forecast The Exit Planning Process for Value Maximisation Pricing and Options	4.2

## Practical Exercises & Safe-Space Practice

### Practice with Purpose: Real-World Exercises & Feedback

To help you apply what you learn in both group sessions and one-to-one mentoring, the **VFD Mastermind Programme** includes a suite of practical exercises. These are designed to be completed using real-world (but anonymised) examples, giving you the freedom to practice, correct any mistakes, and learn in a safe and supportive environment.

These exercises span both technical delivery and commercial growth topics. You can work through them in any order and at your own pace, we recommend tackling those most relevant to your immediate goals first.

Throughout the process, you will receive support and feedback through:

- group sessions, where insights and peer-learning enrich your understanding.
- one-to-one mentoring, focused on refining your approach and boosting your confidence.

The purpose of these exercises isn't simply to complete them, they are designed to help you master the skills important to you, your client work and your business development objectives.

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## Examples of Assessed Exercises

The following represents a sample of the exercises available. As the programme evolves, additional exercises may be added to reflect new tools, methods, critical expertise and client-engagement scenarios.

### Technical & Operations Exercises

These exercises help you master the practical tools and frameworks used to deliver high-value **Advisory and Fractional CFO** work:

1. **LMS-Based Assessment**
  2. **Business Growth Model Exercise**
  3. **Business Development Plan — Targets & Projected ROI**
  4. **Business Data Model Exercise**
  5. **Non-Financial KPIs Exercise**
  6. **Client Discussion Model Exercise**
  7. **Strategic Planning Exercise**
  8. **Forecast Preparation Exercise**
  9. **Funding Proposal Preparation Exercise**
  10. **Creating a Complete Management Pack & Meeting Agenda**
  11. **Business Valuation — Multiples & Risk Adjustments**
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12. **Consolidation Exercise**

13. **Investment Appraisal Exercise (e.g., IP Strategy Options)**

### **Commercial & Lead-Generation Exercises**

These exercises are focused on developing the skills and processes needed to attract, engage, and retain **Advisory and Fractional CFO** clients:

1. **Identifying Potential Clients in Target Niches**
2. **Building a GDPR-Compliant Marketing List**
3. **Designing Drip-Feed Email & Social Media Automation**
4. **Critical Questioning & Fact-Finding Skills**
5. **Framing the Transformation You Deliver for Clients**
6. **Asking for Referrals with Confidence**
7. **Converting First Commercial Conversations into Paid Engagements**
8. **Managing Forecast / Funding Enquiries**
9. **Defining Scope & Negotiating Win-Win Commercial Agreements**
10. **Automating Professional Proposals for Efficiency & Consistency**
11. **Using IP Strategy as a Lead Generation Method**

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### **How to Get the Most from These Exercises**

- **Pick exercises that align with where you are today:** Focus on forecasting support if you're gearing up for a CFO engagement, or lead-generation workflows if you're building your sales pipeline.
- **Apply real examples:** Using anonymised real client data makes the time you invest in practicing immediately relevant to your work.
- **Feedback:** Bring your exercise outputs one-to-one mentoring and peer sessions to life by discussing the process and the challenges together, the feedback loop accelerates learning.
- **Revisit and refine:** Skills deepen with repetition; return to exercises as you grow and take on new client challenges.

## Building a Professional Services Referral Network

### Expert Ecosystem & Advisory and Fractional CFO Services Forum

To deliver comprehensive **Advisory and Fractional CFO** support, you will inevitably need to build your network of trusted specialists, those whose services complement your own.

These partners often serve similar markets and should become a lucrative source of **qualified referrals** ('Hot Prospects'), the quickest and most effective way to accelerate new client acquisition.

As part of the **Combined VFD Mastermind Group**, we host regular **Expert Briefings and Advisory Forums**. These sessions provide structured opportunities to:

- **Hear from trusted specialist partners** about what they do and how they add value.
- **Explore practical collaboration opportunities** that benefit you and your clients.
- **Share insights and feedback** to strengthen mutual understanding and teamwork.

These interactions help you build your referral ecosystem, increasing your visibility, credibility, and creating a steady flow of new client opportunities.

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### Mapping Expertise to Financial Value

One of the most practical skills you will develop is the ability to explain how specialist services translate into financial impact for a client's business. Using simple frameworks and templates, you will learn how to take partner offerings and express their 'value' in terms that matter most to business owners: Revenue, Profit, Cash Flow and Valuation.

This skill supports stronger conversations with both partners and clients and helps you stand out as a trusted advisor.

### Benefits of This Approach

1. **Demonstrates deep understanding**  
You show partners and clients that you truly understand how various services contribute to business and financial success for both parties.
2. **Connects services to financial outcomes**  
You convert general commercial benefits into clear financial terms business owners care about and want to be educated on, giving you more 'hooks' with which to start conversations.
3. **Elevates your credibility**  
Being able to articulate third-party value through a financial lens strengthens your professional authority.
4. **Encourages reciprocal referrals**  
Successful referral relationships are built on reciprocity, being able to identify and discuss ways in which your 'partners' can help owners, allows you to make referrals,

and the best we to get more referrals, is to make more referrals, (the Law of Reciprocity).

5. **Expands your *Advisory and Fractional CFO* services toolkit**

A growing set of financially grounded ideas makes it easier to open meaningful conversations and differentiate you and your practice.

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### **A Practical Advantage**

By combining financial insight with referral-network awareness, you create a clear professional advantage. You'll be equipped to engage business owners confidently, lead value-focused discussions, and build sustainable referral momentum without overly technical language or hard sell approaches.

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## Group Coaching, Peer Support & Outreach Support

**VFD Mastermind Group** sessions are designed to accelerate learning, build capability, and foster group collaboration and group learning. By working to help each other overcome challenges and learn from the mistakes of others, you further accelerate your commercial and technical prowess.

To support different aspects of your **Advisory and Fractional CFO** practice, we offer **four complementary types of group coaching and support**, all included within your Mastermind membership:

1. **Mastermind Insight Sessions:** Broad learning & shared knowledge
2. **Commercial Coaching & Peer Support:** Lead generation, sales skills & client engagement
3. **Technical Coaching & Peer Support:** **Advisory and Fractional CFO** service delivery & operational excellence
4. **Marketing Outreach Support:** Building your marketing automation systems and your sales pipeline

Each plays a supplementary role, helping you grow your skills and your practice, all are included in your Mastermind membership where relevant.

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### 1. Mastermind Insight Sessions – Shared Learning & Knowledge Transfer

These regular group sessions are open to all Mastermind members and provide:

- Opportunities to work with the key tools, frameworks, and concepts
- The chance to to share successes and challenges and learn from/with peers
- Reinforce understanding of key topics through repeated analysis and discussion
- Regular introduction of new material and perspectives to continually build expertise

Insight Sessions focus on **knowledge transfer and idea exchange**, ideal for building confidence and deepening understanding both commercial and technical areas. They provide the foundation for deeper, more tailored work in the focused, personalised one-to-one coaching sessions.

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### 2. Commercial Coaching & Peer Support – Client Acquisition in Practice

These 'Mastermind Group Members Only' group sessions are focused on **growing your **Advisory and Fractional CFO** practice by developing your client pipeline and your sales skills.**

Key topics are the same as those covered in the one-to-one commercial coaching and mentoring:

- **Generating Leads:** Building a database of qualified prospects.
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- **Initiating Client Conversations:** Making a great first impression – building credibility
- **Getting Paid to Sell:** Avoid giving too much value away for free
- **Clarifying Scope & Contracts:** Critical to controlling scope creep and maximising profit
- **Follow-Up & Momentum:** Minimise buyer remorse – driving rapid results
- **Managing Scope Creep Commercially:** Use scope creep to increase fee income

Commercial coaching sessions typically include:

- **Action Planning & Accountability**  
Tracking progress, refining strategies, and identifying key actions.
- **Hot Seat Peer Support**  
Cross-practice problem solving where shared challenges strengthen everyone's capability.

These sessions help you refine your client acquisition process and build confidence in commercial conversations.

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### 3. Technical Coaching & Peer Support – Delivery & Operational Excellence

As you secure each new **Advisory and Fractional CFO** client, delivery and client satisfaction are critical. Technical group coaching focuses on **how to deliver value consistently, retain clients, and scale your operations.**

Topics typically covered include:

- **Goal Setting & Strategic Alignment:** Ensuring shared share vision and priorities
- **Strategic Planning:** Translating client goals into structured, achievable plans
- **Financial Planning & Forecasting:** The three-way forecasts and scenario planning
- **Raising Capital:** Funding proposals and selecting the optimum funding solution
- **KPIs & Management Reporting:** Linking non-financial KPIs to financial results
- **Reporting & Meeting Cadence:** Effective MI and agendas for optimal effectiveness
- **Strategic Reviews:** The cadence of quarterly and strategic planning processes

Technical coaching sessions are also supported by:

- **Action Planning & Accountability**  
Reviewing progress and defining next steps for your delivery capability.
- **Hot Seat Peer Support**  
Collaborative problem solving around delivery challenges faced by peers.

These sessions strengthen your **technical and operational strengths**, ensuring you can scale and sustain your **Advisory and Fractional CFO** services work with confidence.

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#### 4. Marketing Outreach Support — Building Your Sales Pipeline

Mastermind also helps you implement your **marketing automation activities** to build your prospect database, maintain value adding, quality communication, engagement interest and awareness among your target audience. This includes:

##### Target List Building

We help you:

- define your **ideal client profile**, and
- build a database of potential clients (“suspects”) in your target market

A strong database lets you communicate consistently and build familiarity over time, increasing the likelihood that contacts engage when they are ready for **Advisory and Fractional CFO** support.

##### Outreach Activities

Outreach engages your target audience through deliberate communication. For example:

- Email and social media communications
- Content designed to raise awareness and demonstrate expertise
- Ongoing engagement to build trust without appearing overtly sales focused.

This approach recognises that most buyers go through an informal “buyer journey” from initial awareness through to purchase readiness, your marketing must support that progression with relevant, value-focused communication.

We help you define systems and processes to do this effectively, whether using your own tools (website, CRM and related tools) or partnering with **Growing Your Numbers (GYN)** to amplify your reach whilst minimising your upfront investment.

Marketing outreach is designed to complement your **commercial coaching**, helping you build a pipeline of prospects with whom you can engage, and when the time is right, sell to.

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##### How These Fit Together

- **Insight Sessions** build knowledge and shared understanding
  - **Commercial Group Coaching** translates knowhow into client acquisition success
  - **Technical Group Coaching** to deliver Advisory and Fractional CFO Service
  - **Marketing Outreach Support** identify and engage the right prospects over time.
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Together, these elements provide a **balanced support ecosystem** that strengthens your **Advisory and Fractional CFO** practice from first contact through to delivery and growth, all supported by structured mentoring, peer accountability, and practical tools.

### VFD Portal with the VFD Exit Success Practice Plan Functionality

As a **Combined Mastermind Group member**, you receive your own **VFD Portal** with powerful **Advisory and Fractional CFO** and business intelligence features included at no additional cost.

This gives provides a fully branded workspace to analyse client data, generate reports and start delivering high-value services immediately, without needing a separate subscription.

### Your Branded VFD Portal Includes:

- **Branded User Portal:** Your VFD Portal branded with your logo, colours and contact details so when clients logon, they enjoy a harmonised user experience
- **Branded Reports & Models:** All reports and models you generate for clients carry your practice branding, logo, colours and contact details
- **Business Intelligence Dashboard:** Quickly slice and dice your client's financial data in just a few clicks to pinpoint trends and opportunities quickly and confidently
- **Client Advisory Assessment Model (CAAM):** Use the CAAM analysis to identify advisory opportunities and plan service delivery
- **Grow & Exit Connection:** Your portal includes one **Grow & Exit** connection to use on your own practice or your first paying **Advisory and Fractional CFO** client\*  
*\* If you need additional connections, enjoy 30% discount off the regular price from day one.*
- **Unlimited Business Development & Business Overview Connections:** Use the Business Development and Business Overview connections with unlimited businesses

### How This Adds Value

This level of functionality should cost **£299 + VAT per month**. With your **VFD Mastermind membership** all this is included at no additional cost.

## Appendix 2: Continual Professional Development (CPD)

Continuing Professional Development (CPD) is a core requirement for accountants and finance professionals.

### CPD You Can Count On

Mastermind Membership offers multiple structured learning activities that constitute qualifying CPD reporting with all the major accountancy bodies:

- **VFD Mastery Training:** 28 hours of formal, structured, verifiable CPD, with defined learning outcomes. This training can be *repeated* as often as needed.
- **Mastermind Insight Workshops:** Up to 8 hours per month of facilitated peer learning and insight sessions - *up to 96 hours of potential CPD* over a year.
- **Technical One-to-One Coaching:** Approx. 1 hour per month of focused guidance on delivery and toolkit use - *up to 12 hours of CPD* per year.
- **Commercial One-to-One Coaching:** Approx. 1 hour per month of business-growth coaching, *up to 12 hours of CPD* per year.

**Maximum potential structured, verifiable CPD:** Up to 148 hours

All CPD activities are accompanied by **attendance certificates and clearly defined learning outcomes** to support submission to your professional body.

### Mapped to Professional Standards

The programme content is aligned with core expectations of major UK and international accountancy bodies, including:

- **ICAEW:** Supports CPD in Category 2 (Professional Skills) and Category 3 (Personal Skills), and contributes significantly to Category 1 (Technical Knowledge). *(Specific mapping guidance available upon request.)*
- **ACCA:** Exceeds the 21 hours of verifiable CPD normally required annually. The structured workshop and coaching hours provide clearly trackable evidence of learning.
- **CIMA:** Provides structured CPD across all four competency areas:
  - Technical competence
  - Business and commercial acumen
  - People and communication
  - Leadership and professional effectiveness

Certificates and learning outcomes from each component support submissions to all three bodies.

### Comprehensive Coverage — Beyond Compliance

The CPD content gained through **VFD Mastermind Membership** spans three dimensions of professional development:

- **Technical Competence:** Compliance essentials, management reporting, forecasting & modelling, valuations, and financial review.
  - **Professional Skills:** Effective client communication, facilitation of board-level financial discussions, commercial **Advisory and Fractional CFO** frameworks.
  - **Business & Leadership:** Operating as a Fractional FD/CFO, strategic planning, succession and exit support, funding strategy and business growth facilitation.
- 

### Practical Growth Tools — CPD That Counts for Business

Unlike generic CPD activities that are theoretical, the **VFD Mastermind Group** CPD is *practical*, directly applicable to client engagements and practice growth. Hours spent in the programme contribute to:

- **Delivering forward-looking financial insight** for clients
- **Improving client retention** through structured reviews and value-added services
- **Increasing fee income** by packaging and pricing **Advisory and Fractional CFO** engagements

In this way, your CPD becomes **an investment in your practice**, not just a compliance exercise.

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#### **Note on Ethics CPD**

*Most professional bodies require a minimum of **1 hour of Ethics CPD annually**. This is not included as a discrete module in the Mastermind programme but can be easily fulfilled using resources provided by your professional body (e.g., ICAEW or ACCA ethics modules).*

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