



virtual  
finance  
director

**CORE** Insights

# Turning Insights into **Conversations**

A practical guide to starting  
more meaningful conversations  
with your clients



# 1

## Five Simple Conversation Openers

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1

### **Business Performance**

*"I noticed a few changes in your recent results. Would it be useful to spend some time reviewing what may be driving them?"*

2

### **Cash Flow**

*"How confident are you in your cash position over the next six to twelve months?"*

3

### **Growth**

*"What are the biggest opportunities you're currently pursuing?"*

4

### **Challenges**

*"What's proving most difficult in the business right now?"*

5

### **Future Plans**

*"What would success look like over the next few years?"*

# 2

## Three Questions Every Business Owner Should Be Asked

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**These 3 questions help create clarity and open the door to deeper discussions.**

1

### **Where are you now?**

Let's understand how the business is performing today.

2

### **Where do you want to be?**

What are your goals and ambitions for the future?

3

### **What's stopping you getting there?**

What challenges, constraints or risks are holding you back?

# 3

## What to Listen For

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**As you have conversations, listen for clues that highlight opportunities or potential issues.**



### **Growth Ambitions**

"We want to expand."



### **Cash Concerns**

"We always seem to be short of cash."



### **Team and Capacity Issues**

"We don't have enough people."



### **Team Challenges**

"It's becoming harder to recruit."



### **Exit Thoughts**

"I don't know what the business is worth."



### **Lack of Direction**

"We're busy, but we're not really sure where we're heading."

***Each of these statements can lead to valuable future discussions.***

# 4

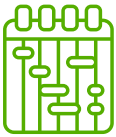
## When You Need a More Structured Approach

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Some opportunities require a more in-depth conversation and a clear action plan



Use the **Business Overview Report** to prepare and guide the discussion.



Consider a management review to set goals, track progress and create accountability.



Explore the **Mastery Programme** to build confidence in delivering advisory solutions.



Join a **VFD Mastermind** group to share ideas and learn from like-minded professionals.

CORE Insights helps you see the opportunity.  
Meaningful conversations help you deliver it

# 5

## Your Next Step

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### What Happens Next?

You've completed your CORE Insights Portfolio Review and explored ways to turn insight into conversation.

The next step is deciding where to focus your attention and what actions to take.

### Complete Your Portfolio Review Summary

Tell us what you discovered and we'll be happy to discuss your findings, answer questions and explore whether CORE Insights could support your firm on an ongoing basis.

**Complete Your Summary**



CORE Insights helps you see the opportunity.  
Meaningful conversations help you deliver it