



Read Me

Before leaping into innovation, read this document for a quick introduction to the AdviceTech Roadmap Toolkit and what you'll be doing.

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Welcome to the Netwealth AdviceTech Toolkit

Why is innovation important?

A smart business is open enough to be self-critical, and challenge current ways of working.

Truly exceptional businesses are brave enough to try new ideas, experiment with w offers, build new business models and value propositions to ensure they remain successful.

By completing this workshop we believe it will help you to think about your customer experience and your business in a different light.

What's in the toolkit

Workshop leader guide: A helpful guide to help you run the workshop smoothly and get the best out of your team. **It contains a checklist for setting up**, including what to purchase prior.

Workshop presentation: The primary reference point for the workshop, it outlines and explains all exercises and activities.

Templates: For the participants to use throughout the workshop – print these prior.

Pre-reading articles: To help the team get into the right frame of mind for the workshop.

The workshops

Part A: Examine the potential impact of AdviceTech

The aim of Part A is to examine how the different AdviceTech solutions can help your customer experience or your business.

It will also help you identify what changes in your business are required to implement the AdviceTech.

Part B: Prioritise AdviceTech

The aim of Part B is to help you prioritise the most important AdviceTech for your customer experience and your business.

This exercise involves a team discussion of the business value and implementation ease of the AdviceTech.

What to do next?

1. Decide on the timings and participants.
2. Send calendar invites for the team. The more people you invite the greater the number and diversity of thought.
3. Decide on a workshop leader, if this is not you. Their role is to make sure the workshop runs smoothly.
4. When selecting a workshop leader we recommend you take into consideration the following traits.

Openness: Great workshop leaders need to be open to the many ideas, opinions and ways of working of their team, holding judgement and being patient.

Great listeners: He or she must be able to actively listen, to and remember the many different perspectives in the room. They will need to repeat, sum up, or respond directly to what a speaker said to ensure the speaker's meaning was correctly understood by the group.

Tact: Sometimes the workshop leader must take uncomfortable actions or say awkward things for the good of the group. The ability to do so carefully and diplomatically is critical.

Sensitivity: Innovation workshops can be uncomfortable for many. The workshop leader needs to engender the trust and respect of the room quickly to build an atmosphere of bravery, broad-mindedness and collaboration.

Resourcefulness: A great workshop leader needs to be able to think on their feet and flex the activity based on the feeling in the room. They need to be able to re-frame an activity to help drive understanding and engagement.

A sense of humour: As in most human endeavours, even the most serious, a workshop leader's appreciation of life's ironies, ability to laugh at themselves, and to share the laughter of others enhances the experience for everyone.

5. Send the workshop leader the Workshop leader guide **to read at least 7 days before the workshop**. There may be things to be purchasedw.
6. Send pre-reading to the team at least 3 days before the workshop.
7. Start the workshop and begin innovating!