



Opportune | Training CPAs for Effective Client, Conference & New Business Meetings

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THE CHALLENGE

Opportune LLP, a global energy consulting firm, engaged Pierpont seeking guidance on developing their CPA groups to increase their company's effectiveness. The Opportune CPA group required training to deliver the necessary results to help the company succeed.

OBJECTIVE

Refine and strengthen Opportune CPA leader's presentation skills and create a corporate narrative for their clients to drive and nurture new business leads.

APPROACH

Pierpont curated a full day of custom training for 25 CPA members, aiding in articulating the company's corporate narrative and what value proposition members can offer to the firm's clients. Training focused on public speaking, networking at conferences, cross-selling at client events, and more. The session consisted of a 4-hour classroom course, separate 1:1 training with each participant and concluded with a full group discussion on lessons learned.

RESULTS

Pierpont enabled Opportune and its CPA groups to effectively organize, prepare presentations and supporting materials, practice for public speaking and networking to effectively share the company's value.