

B | I | R | D

BUILD • INNOVATE • REIMAGINE • DELEGATE

BIRD TBT

THE BIRD BUSINESS TRANSFORMATION WORKSHOP

THREE DAYS. TWELVE BLUEPRINTS.

A residential, hands-on workshop where MFDs turn SA.A.SS into their own written business blueprint.

5, 6 & 7 DECEMBER 2026 · CLUB CABANA, BANGALORE

WHERE TBT SITS

BETWEEN CLARITY AND EXECUTION.

TBT is not just about understanding SA.A.SS. It is where your ideas become **a documented plan**, written in your own words.

TBC

UNDERSTAND SA.A.SS

The clarity programme.

TBT

DESIGN YOUR BLUEPRINT

Three days, twelve written blueprints.

YOU ARE HERE

TBS

IMPLEMENT IT

Systems and courses: the operating system.



THE CORE OBJECTIVE

To empower MFDs and personal finance professionals to create and design their ultimate personalised SA.A.SS business plan and business blueprint.

TWO WAYS TO BUILD A BUSINESS.

Two very different results. The choice you make today decides the freedom and the value you create tomorrow.



WORKING “IN” IT

You are the doer. The business depends on you.

Founder dependent: everything revolves around you

Day-to-day operations: the diary runs the business

Instructions: you manage people, not systems

Income focus: too comfortable with trail income

Reactive: problems solved as they arise

Long hours: no time for strategy or growth

Limited value: the business is worth what you are

YOU OWN A JOB



WORKING “ON” IT

You build the system. The business grows without you.

System driven: processes run the business

Strategy and growth: you work on it, not in it

Leaders drive results: a team you build and empower

Value focus: scale, profit and value come first

Proactive: you design, plan and implement

Time freedom: time for what matters most

High value: worth more than you are

YOU OWN A BUSINESS THAT CREATES FREEDOM

TWELVE BLUEPRINTS. ALL YOURS, IN WRITING.

By the end of the three days, you will have written each of these for your own practice.



01

BUSINESS DIRECTION

- Your ultimate business vision
- Mission clarity
- Personal transformation blueprint



02

GOAL & GROWTH

- Clear business goals
- Target magic numbers
- Growth direction



03

CLIENT & SEGMENT

- Top three target customer segments
- Client profiles and P.A.I.N points
- Segment-based opportunity map



04

PRODUCTS & SERVICES

- Offering menu card
- Segment-based investment solutions
- Client value proposition



05

LEAD GENERATION

- Marketing direction
- Lead generation systems
- Weekly meeting targets



06

CLIENT RETENTION

- Retention strategies
- Client experience design
- Long-term relationship planning

THE BUSINESS THAT RUNS WITHOUT YOU.

Team, systems, risk, value, budget and policy: the six that make the practice an enterprise.



07

TEAM & HR

- Team recruitment plan
- Team development plan
- Retention strategy and appraisal structure



08

SYSTEMS & PROCESS

- Business systems
- SOP direction and process design
- Operational structure



09

RISK & COMPLIANCE

- Compliance plan
- Business risk management plan
- Protection framework



10

VALUATION & SUCCESSION

- Valuation multiplier blueprint
- Succession roadmap
- Exit strategy options



11

BUSINESS BUDGETING

- Cost planning
- Capacity building
- Investment in scale



12

HR POLICIES & INDUCTION

- HR policies
- Team induction
- Process blueprint

SCATTERED IDEAS BECOME A WRITTEN PLAN.

Thoughts	→ STRUCTURE
Ambition	→ NUMBERS
Clients	→ SEGMENTS
Services	→ OFFERINGS
Team needs	→ HIRING PLANS
Risks	→ PROTECTION PLANS
Trail income	→ VALUATION THINKING
Business dependency	→ SUCCESSION PLANNING

WHO SHOULD ATTEND

COME IF YOU ARE READY TO WRITE IT DOWN.

01 MFDs ready to design You understand S.A.A.S.S and want your own roadmap.	02 Finance professionals Planning a serious business transformation.	03 Practice owners Wanting clarity on scale, team, systems and succession.	04 Advisors with scattered ideas Who want a written blueprint instead.	05 Professionals in transition From a self-driven practice to an enterprise.
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FROM PEOPLE WHO HAVE BEEN IN THE ROOM.

“The energy was contagious, it helped us craft better strategies, we had tons of fun, and most importantly—we made a ton of friends!”

CHINTAN KAMDAR

“Thanks to NLE team to make us 3 days memorable this was a amazing experience with learning fun and thanks to all participants to share their experiences and solutions”

MADHUSUDAN GOYAL

Watch them tell it. Ravindra Deshmukh (Satara), Vikas Wani (Surat), Shifali Satsangee and Rohit Gyanchandani share their TBT experience on video at nlebird.com/tbt.



NEW AT TBT

A starter set of BIRD's HNI tools and Spiritual Finance tools, alongside the twelve blueprints.

START AT TBT. COMPLETE AT TBS.

At TBT you design the business. At TBS you build it, with the full toolkits and systems.

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RESERVE YOUR SEAT.

FORMAT

PHYSICAL

In person, not online

DURATION

3 DAYS, 2 NIGHTS

Residential

DATES

5, 6 & 7 DEC 2026

VENUE

CLUB CABANA Bangalore

THE WORKSHOP COVERS

- ✓ Complete three-day training
- ✓ Learning resources
- ✓ Three lunches, two dinners
- ✓ The BIRD Workbook
- ✓ Twin-sharing accommodation
- ✓ Two breakfasts and high tea

RESERVE YOUR SEAT

Three days to write the business you want to build. Scan the code or visit the page.

nlebird.com/tbt



Skill to scale. Build to last.