NAPO2027 Level Up
Titles and Suggested Objectives

NAPO has identified the following titles and suggested objectives to define each session's intended scope and level. Selected speakers will develop the final course description and revise measurable learning objectives to align with the suggested objectives.

Client Facing Track:

From Projects to Retainers Recurring-Revenue Client Models (Client Service)

Suggested Objectives: By the end of this session, participants should be able to:

- **Evaluate** their existing services and client base to identify opportunities for recurring revenue beyond traditional one-time organizing projects.
- **Compare** recurring-service models, including maintenance organizing, ongoing productivity support, seasonal services, memberships, retainers, and other repeat-engagement structures.
- **Design** a recurring service model with a clear scope, cadence, pricing structure, boundaries, and client value proposition.
- **Develop** a strategy for transitioning appropriate existing or past clients into recurring relationships without relying on continual reselling.
- **Assess** the operational and financial viability of a recurring offering, including capacity, profitability, client retention, and delivery requirements.

Virtual & Hybrid Organizing at Scale (Operations)

Suggested Objectives: By the end of this session, participants should be able to:

- **Evaluate** which client needs, organizing services, and stages of the client journey are best suited for virtual, in-person, or hybrid delivery.
- **Design** a repeatable virtual or hybrid service model with defined workflows, client expectations, technology, communication practices, and boundaries.
- **Adapt** virtual delivery beyond one-to-one sessions through approaches such as packages, group programs, ongoing support, or team-based delivery.
- **Identify and address** common friction points that affect the client experience or operational efficiency when virtual services expand.
- **Create** a plan for integrating virtual and hybrid services into an existing business in a way that supports capacity, consistency, profitability, and scale.

Inclusive & Accessible Service Delivery (Client Service)

Suggested Objectives: By the end of this session, participants should be able to:

- **Identify** potential physical, cognitive, sensory, communication, technological, cultural, and other barriers within their existing client experience.
- **Apply** inclusive design principles to consultations, communication, organizing sessions, recommendations, and follow-up without assuming that every client requires the same type of support.
- **Adapt** service delivery in response to individual client needs while maintaining appropriate professional scope, boundaries, and business sustainability.
- **Evaluate** organizing systems and recommendations for accessibility and usability based on the person who must actually maintain them.

- **Conduct** an accessibility review of their current client journey and identify specific changes that would reduce barriers to working with their business.

Brand Repositioning to a Premium Price Point (Sales & Marketing)

Suggested Objectives: By the end of this session, participants should be able to:

- **Assess** whether their current positioning, messaging, services, and client experience support the price point they want to command.
- **Differentiate** between selling time or organizing tasks and positioning professional expertise, implementation, transformation, and outcomes.
- **Identify** the changes to brand messaging, service structure, sales process, and client experience needed to support premium positioning.
- **Develop** a differentiated value proposition that communicates why an ideal client should select their business beyond price or hours of service.
- **Create** a repositioning plan that aligns pricing, messaging, offerings, proof of value, and client experience without alienating the business's intended audience.

Back-End Business Track:

Financial KPIs & Owner Dashboards (Finance)

Suggested Objectives: By the end of this session, participants should be able to:

- **Select** a focused set of financial and operational KPIs appropriate to their business model, size, and growth goals.
- **Calculate and interpret** measures such as revenue per service hour, utilization, gross margin, client acquisition cost, average client value, profitability by service, and other relevant indicators.
- **Distinguish** between useful decision-making metrics and data that creates reporting activity without meaningful business insight.
- **Build** a practical owner dashboard that provides an at-a-glance view of business health, trends, capacity, and performance.
- **Use** dashboard data to make informed decisions about pricing, staffing, marketing investment, service offerings, capacity, and growth.

Strategic Leadership: Deciding What's Next for Your Business (Business Leadership)

Suggested Objectives: By the end of this session, participants should be able to:

- **Evaluate** their current role in the business, including where their time goes and which work truly needs them.
- **Assess** new and existing opportunities against their financial, capacity, and strategic goals.
- **Determine** where their expertise adds the most value to the business and its clients.
- **Identify** what to stop, delegate, or change as the business moves into its next stage.
- **Create** a decision-making framework for choosing what to do next and what to deliberately not do.

Get Found in 2027: Paid Ads, Local SEO & AI-Search (GEO) (Sales & Marketing)

Suggested Objectives: By the end of this session, participants should be able to:

- **Evaluate** how prospective clients currently discover their business across traditional search, local search, paid search, and AI-generated recommendations.
- **Audit** their current digital presence to identify weaknesses affecting local search visibility and AI-search discoverability.

- **Implement** priority improvements to their website, Google Business Profile, content, authority signals, and other digital assets that influence discoverability.
- **Determine** when paid advertising is appropriate and distinguish between situations where improving organic/local visibility should take priority over ad spend.
- **Develop** a measurable search visibility plan that identifies what to change, where to invest resources, and which indicators to monitor over time.

AI & Automation for the Back Office

Suggested Objectives: By the end of this session, participants should be able to:

- **Map** their back-office workflows to identify repetitive, administrative, or data-driven tasks that are strong candidates for AI assistance or automation.
- **Determine** when a task should be automated, AI-assisted, delegated, simplified, or intentionally remain human-led.
- **Design** interconnected workflows that reduce manual handoffs across functions such as lead management, scheduling, onboarding, communication, documentation, invoicing, follow-up, and marketing.
- **Evaluate** AI and automation solutions based on business value, reliability, privacy, security, client experience, cost, and required human oversight.
- **Create** an implementation roadmap that prioritizes high-impact automations while establishing appropriate review points and safeguards.