

// Thank you for our recent business advisory training held in Adelaide. Your enthusiasm and energy along with your experience and expertise allowed the staff to gain and expand their knowledge. Not only are our staff benefitting from your system and processes but more importantly our clients are getting additional value from the services we currently offer. Peter Appleyard ~ appleyard+associates

Business Advisory Enabled



My experience is that accountants struggle with implementation, so I designed a service that by mentoring and coaching you, will ensure you successfully develop your business advisory service.

Mark Holton, Smithink Director

- » Is your firm adequately prepared to deliver business advisory services?
- » Do you have the right firm structure and infrastructure within your firm?
- » Have you created a business advisory implementation plan?
- » Have you created a plan and now need additional ongoing support to get there?
- » Do you need an external business advisory coach to drive success?
- » Do you need help profiling clients to find your first confidence building engagements?
- » Do you need help unlocking your clients' needs and creating an engagement process?
- » Do your staff need additional training on business advisory tools?

**Sign up and commit to an implementation program
to get your Business Advisory plan on target!**



Sign up and commit to an implementation program to get your Business Advisory plan on target.

**FREE EMAIL
& ONGOING
PHONE SUPPORT**

YOUR INVESTMENT:

Pricing is dependent on your firm size and will be \$2000 to \$3000 per month + travel costs.

This will be confirmed by Mark when you speak.

**Smithink membership
for the duration
of the program!**

HOW IT WILL WORK: Suggested program customised to your practice

Preliminary Teleconference Assessment

Have you considered the most common issues firms face when moving into this space?

Does your firm have the right structure and mindset to offer business advisory services?

Do you know what services you can offer successfully to clients to get them engaged?

Who are the right clients to start with to create success?

Do you currently have the ideal staff with the appropriate skill set to offer this service?

What risks and bottlenecks do you need to address?

From this process you will know where your firm is today and what it needs to do to achieve success in the future.

The first step in the Business Advisory Enabled process is to conduct a Business Advisory Implementation Planning Day.

This day is "in house" at your firm and follows a very structured process. The product of this day is a Business Advisory Implementation plan that the firm can follow to get the right systems, processes and people resources in place.

The day will cover:

- ▶ *Building the right structure in the firm to enhance business advisory services.*
- ▶ *Develop the services you can offer successfully to clients to get them engaged.*
- ▶ *Finding the right clients to start with and the right tools to create success.*
- ▶ *Who are the ideal staff to recruit or develop with the appropriate skill set to offer this service.*
- ▶ *Develop the right systems, processes and procedures to create efficient scalable advisory services.*
- ▶ *What business advisory software do I need and how to achieve a return on that investment.*
- ▶ *The process to fast track system to develop your business advisory services using a structured process of accountability.*

The cost for this PLANNING DAY is \$3000 plus GST and reasonable travel costs.

The next four stages include:

Full day onsite meetings

60 minute video conference to follow up actions and deal with any issues.

Follow up teleconferences to monitor progress between face to face meetings.

1st Quarterly

- Establish or critique your firms BA implementation plan.
- Getting your team on the bus – building commitment.
- Finding your first three confidence building clients.
- Agree on firm structure and infrastructure.
- Develop initial structured software plan.

2nd Quarterly

- Where are we at?
- Develop a capacity and resource plan.
- Training on key advisory tools.
- Setup real client consultation.
- Agree plan for client seminar.
- Agree on a client engagement and service delivery plan.

3rd Quarterly

- Where are we at?
- Real client consultation with constructive critique.
- Review of tools being effectively used.
- Assess future marketing activity.

4th Quarterly

- Client seminar presentation (day before meeting).
- Review and update implementation plan.
- Additional training as required.
- Establish next year's implementation, training and marketing plan.

IMPLEMENTATION COACH:

MARK HOLTON, Director.

For Marks' complete bio go online to **smithink.com**



Smithink

EXPERIENCE DELIVERS THE HOW

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