
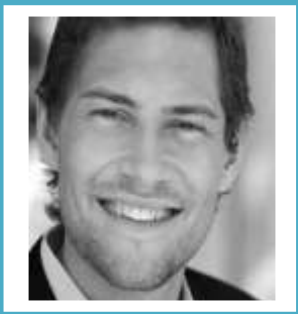

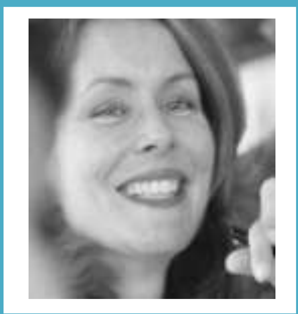

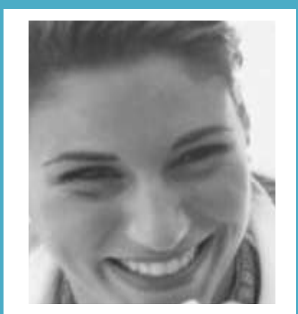


The Complete Advisory Solution

Suite Details

building advisory
gaining new clients
displaying proactivity

The Complete Advisory Solution

The Complete Advisory Solution was developed by accountants for accountants and has been successfully used with literally thousands of clients. It's made up of a comprehensive range of revenue-generating client engagement tools, arranged in four levels.

Discovery
Find the Gap Business Find the Gap Personal The Corporate Energizer The Business Energizer The Business Performance Energizer The People Energizer The Tax Energizer The Personal Energizer

Planning
The Strategic Planning Toolkit (SPT) The Annual Strategic Review The SPT for New Businesses The Annual Wealth Tracker The Entrepreneurial Wealth Tracker The Personal Wealth Tracker

Implementation
The Road Map The Management Meeting Toolkit The Business Success Process The Personal Success Process

Performance
The Profit Improvement Toolkit The Top Line Growth Toolkit The Key Performance Toolkit The Risk Management Toolkit The Team Engagement Toolkit The Innovation Toolkit The Culture and Brand Toolkit The Wealth from Business Toolkit The Personal Goals Toolkit

"Use of the Corporate Energizer has been hugely successful……major fees from advisory projects, referrals and happy clients"

Development Partner

The Complete Advisory Solution

The Complete Advisory **Solution**

Discovery

These holistic discovery tools enable you to better understand clients' and prospects' aspirations and business drivers. This displays proactivity and opens the door for advisory projects without a 'hard-sale', delivers value and impresses clients.

Find the Gap Business – is a discovery tool which enables you to consider client opportunities in your office before taking your proactive ideas to present to the client in an engaging and visually impressive way. Clients will be impressed and identifying their success gaps will provide you with agreement to next steps involving fee producing work.

Many licensees offer Find the Gap for free and it is unlikely to take any more than 45 minutes to an hour to complete both in the office and client modules.

Find the Gap Personal – is a discovery tool which enables you to consider client opportunities in your office before taking your proactive ideas to present to the client in a visually impressive way. Clients will be impressed and engage with their wealth creation, this will then provide you with agreement to next steps involving fee producing work.

Many licensees offer Find the Gap for free and it is unlikely to take any more than 45 minutes to an hour to complete both in the office and client modules.

The Corporate Energizer – is a holistic review of where a company is and what the key management team or owners want and need for the future to achieve greater success. You ask high quality questions about key performance areas in a 1 to 2 hour meeting with clients or prospects. The tool offers you the opportunity to gain a simple 'yes' to the follow-up and additional revenue producing work or to sign up a new client impressed by this differentiation.

The Business Energizer – is a holistic review of where an individual business owner feels they and their business is now. You ask high quality questions about key areas of success in a 1 to 2 hour meeting with individual clients. The tool offers you the opportunity to gain a simple 'yes' to the follow-up and additional revenue producing work.

The Business Performance Energizer – is a holistic tool for owner managed businesses. You ask high quality questions about key performance areas in a 1 to 2 hours meeting with clients. The tool offers you the opportunity to gain a simple 'yes' to the follow-up and additional revenue producing work.

The People Energizer – is a holistic tool for organizations or teams. It involves a review of the team or organization and what the team leader wants and needs for the future to achieve greater success and to gain a simple 'yes' to the follow-up.

The Tax Energizer – is a holistic tool that understands that tax is emotive. This involves a 1 to 2 hour fully facilitated session with an individual client that allows them to feel more in control of their tax affairs and you to have the opportunity for tax and financial planning work and to gain a simple 'yes' to the follow-up.

The Personal Energizer – is a holistic tool for individuals. It uses facilitation principles in a 1 to 2 hour meeting where clients or prospects can look at what they want more of and what they don't want in their lives and careers.

The Complete Advisory Solution

Planning

These strategic tools enable you to offer annual strategic reviews for business and individuals and these goals can then form the basis of a Road Map of implementation help.

The Strategic Planning Toolkit (SPT) – facilitates structured strategic development meetings with your clients. The tool is fully modularized and enables you to tailor to clients' needs. Clients love this approach because it offers them the opportunity to focus on their personal and business objectives, away from the 'heat of battle'. Invariably they need you to be involved, which means all manner of project work as you help them put their plans into action.

The Annual Strategic Review – enables you to run successful annual strategic meetings with existing advisory clients to maintain focus and momentum. This tool is at the core of an ongoing advisory role and positioned as a key annual event.

The Strategic Planning Toolkit for New Businesses – using the same principles as the SPT, this tool enables you to help prospective owner-managers plan for the business they really want. This is a particularly useful tool for attracting high-quality start-ups, so valuable to you.

The Annual Wealth Tracker – is an annual 'feel good' tool designed for individual clients. It enables you to offer your clients an annual strategic wealth review to plan for wealth generation over a 5 year period. It takes around 1½ to 2½ hours to complete and typically leads to tax planning and financial services work. This tool is at the core of an ongoing advisory role and positioned as a key annual event.

The Entrepreneurial Wealth Tracker – is a 'feel good' tool designed for individual business owners. It enables you to offer your clients a strategic personal plan for wealth generation over a 5 year period. A Wealth Tracker planning meeting takes around 1½ to 2½ hours to complete and typically leads to tax planning and financial services work.

The Personal Wealth Tracker – is a tool which enables you to offer your clients a strategic personal plan for wealth generation over a 5 year period. It is designed for use with individuals. A planning session takes around 1½ to 2½ hours to complete that leads to tax planning and financial service work.

"It's changed how we talk to clients and prospects and we are also having fun!"

Managing Partner

The Complete Advisory Solution

Implementation

These tools enable you to help clients implement their plans and encourage them to maintain momentum and stay on track and allow you to be regularly involved.

The Road Map – a program design tool to help you and a client agree the client's tailored process of advisory interaction. This gains agreement and buy-in to your advisory input and affirms your status as Most Trusted Advisor and includes a visual representation of the year ahead and importantly, your involvement.

The Management Meeting Toolkit – a structured and effective tool to help run quarterly meetings with clients, review results and monitor important performance areas that involve you in the on-going management and implementation of plans.

The Business Success Process – a coaching and review tool that helps keep clients on track with all their plans, maintain momentum and generate new actions in the short and medium term. The Business Success Process helps the client stay focused and refine and refresh their plans.

The Personal Success Process – a coaching tool that helps individual clients keep on track with their personal goals and development plans. This enables them to stay focused and motivated and refresh their plans.

"Over 40% of clients have requested additional, billable services as a result of its use"

Senior Partner

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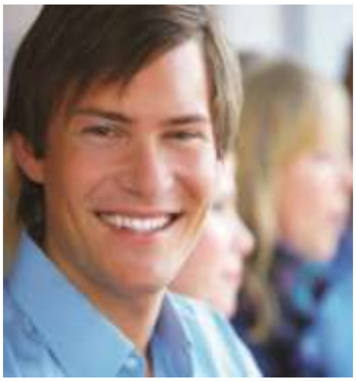
Performance

These tools drill-down to levels of performance and specific client needs, covering profit improvement, performance management, wealth generation, innovation, team and culture and personal goal setting.



The Profit Improvement Toolkit – enables you to offer your clients an innovative approach to improving their profitability. The various modules are usually conducted with management team members or business owners. It allows you to raise the right questions, with the right people and find the right solutions. The tool often naturally falls into several modular sessions and meetings.

The Top Line Growth Toolkit – enables you to facilitate structured planning meetings with your clients focusing on how to increase sales revenue. This is a meeting usually conducted with management team members or business owners. The tool looks at the key areas affecting top line growth from lead generation to sales processes and allows clients to focus on what's possible.

The Key Performance Toolkit – enables you to facilitate a greater understanding of your clients' key success factors. By drilling down to the objective driven key performance factors you can help them measure and manage their results, with a positive impact on success rates and business performance.

The Risk Management Toolkit – enables you to explore risk potential with your clients and help them plan to monitor, manage and mitigate risk. Likelihood and impact tools are built into the process to help you prepare achievable plans and generate an updated Risk Register. The result for clients is an increased sense of security.

The Team Engagement Toolkit – enables you to offer strategic planning to teams or departments in larger companies, other organizations or owner managed businesses and encourages them to affirm corporate goals, provide valuable feedback and work together to achieve these goals. The result is a new focus and vigor, which is shared by all team members.

The Innovation Toolkit – enables you to offer innovation planning to businesses and encourages them to explore innovative opportunities in their sales and marketing and how they do business.

The Culture and Brand Toolkit – is a culture planning tool where clients establish the need for improved business culture. The planning meeting focuses on internal and external matters with a strengthened and clear business brand.

The Wealth from Business Toolkit – is a tool which enables you to offer business owners the opportunity to assess the key drivers of wealth in their business and any exit and succession planning issues. This involves a 1½ to 2½ hours fully facilitated meeting.

The Personal Goals Toolkit – is a planning tool especially designed for ambitious individuals. The planning meeting takes about 1½ to 2 hours. At the end of the meeting you provide them with a high quality plan with goals. The tool offers ambitious or positive minded people an inspiring and highly focused process. Invariably, you build close relationships with these influential people.

Next Steps

What Happens Next Is Up To You

The Complete Advisory Solution is proven with use with literally thousands of clients and is a completely joined-up solution that clients love.

To find out more about a license and see how you can use this proven approach, please contact us and arrange a brief online demonstration or an exploratory meeting.

At your own pace and in a way that suits your firm, we can start helping and supporting you to:

- Truly differentiate your firm
- WIN quality new clients
- Engage with clients and increase client spend and added value advisory work

You choose the pace you integrate The Complete Advisory Solution into your firm and Returns on Investment start immediately.

"They regard professionalism, integrity and client satisfaction as the fundamental ways to do business"

Licensee Andrew Rhodes of Sobell Rhodes
UK Managing Partner of the Year 2012
British Accountancy Firm of the Year 2012

…on working with us

The Complete Advisory Solution