

The Truth About Offering Advisory Services

How to Use Advisory Services to Make This Your Best Year Ever.



CAPSTONE MARKETING



HAYDENROCK SOLUTIONS

WE HAVE THE HOW

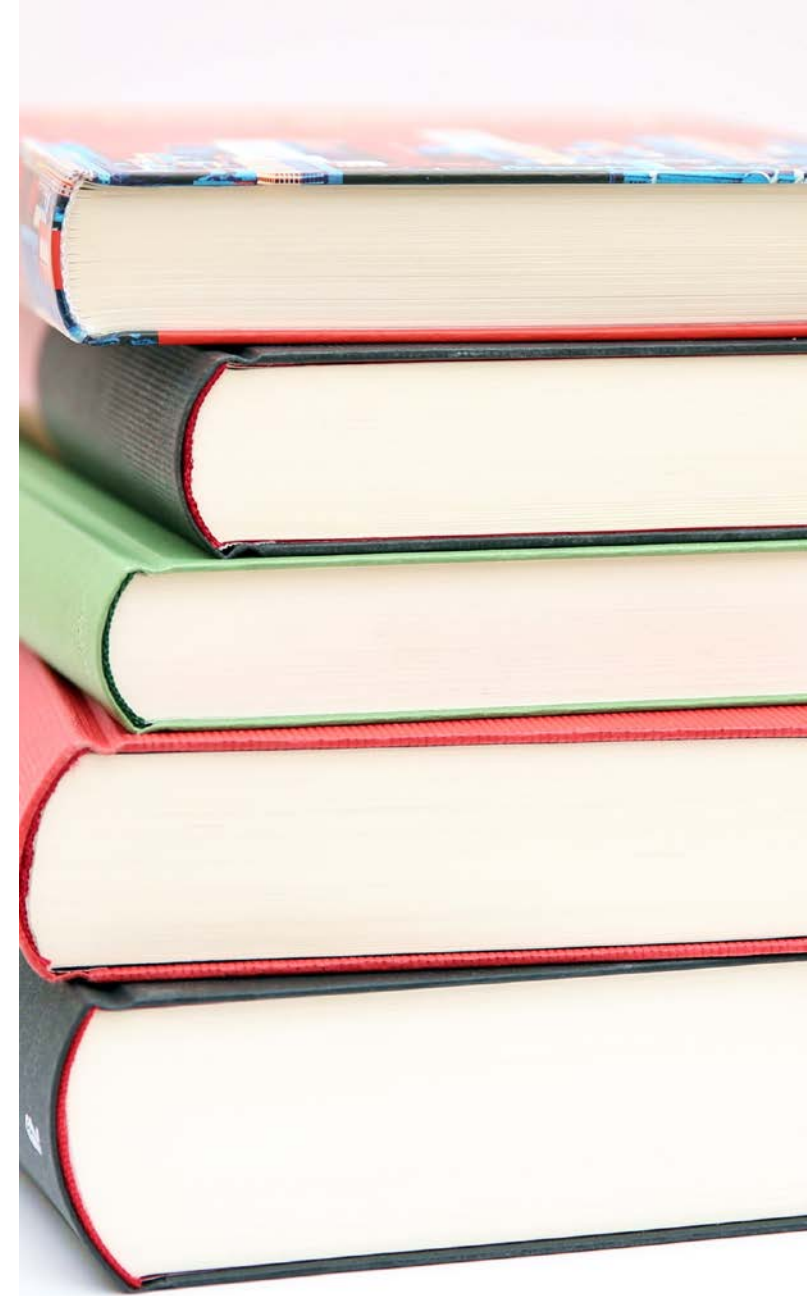
Course Overview

Part I: Why Today's Successful Firms are Offering Advisory Services

Part II: 4 Common Mistakes to Avoid & 4 Building Blocks to Success

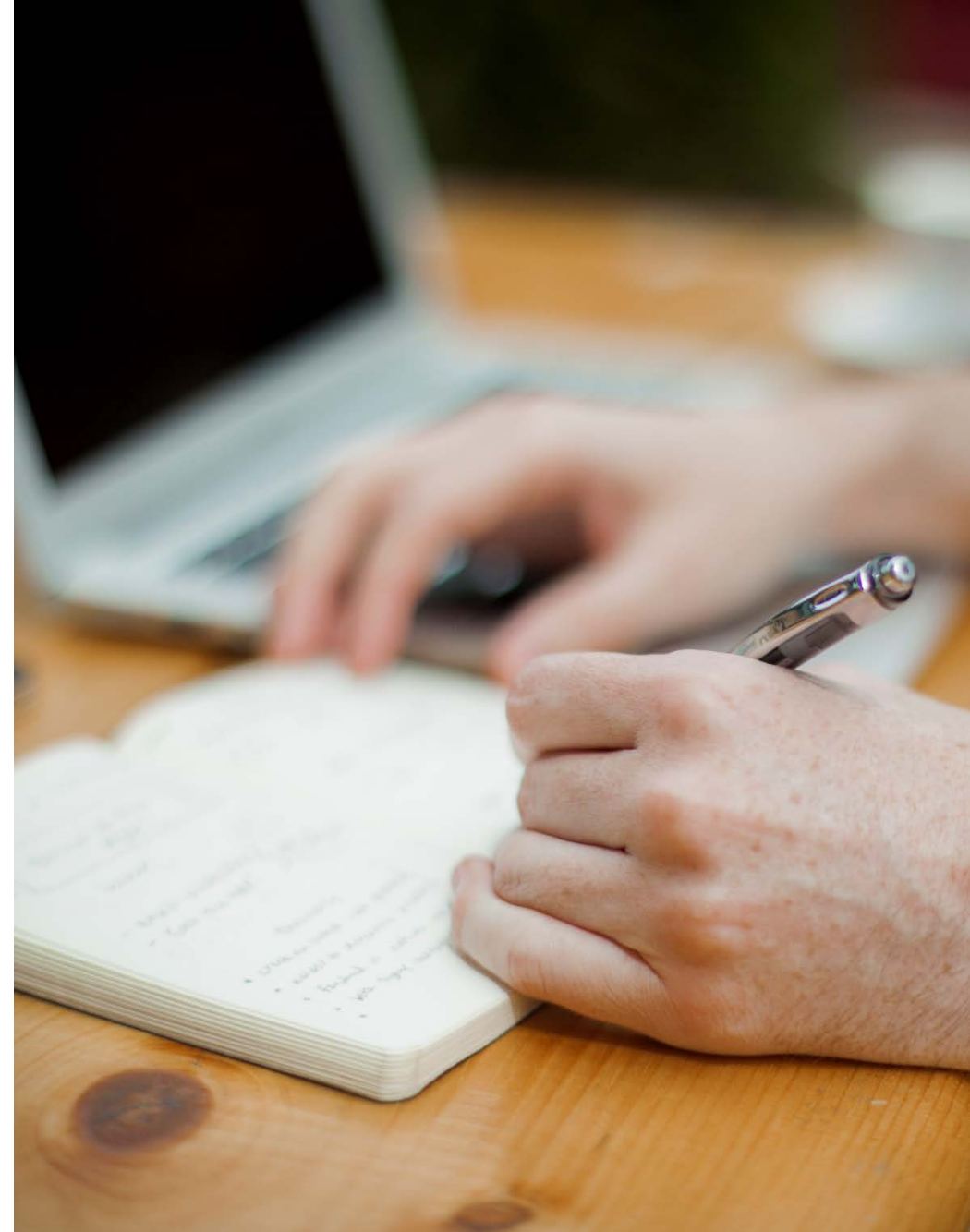
Part III: A Peek Into a Proven System to Help You Become Your Clients' Most Relevant Advisor

Part IV: Review/ Summarize and
How to Make 2018 Your Best Year Ever



Today's Agenda

1. 4 Common Mistakes to Avoid
2. 4 Building Blocks to Success
3. Details on Our Next Webinar: A Peek Into a Proven System to Help You Become Your Clients' Most Relevant Advisor



4 Common Mistakes to Avoid

1.) Ignoring diamonds in your backyard

Top 5 Concerns of CPA Firms

	Sole Practitioner	Under 10 People	11-50 People Firms	Large Firms
1	New Clients	New Clients	New Clients	New Clients
2	Understanding Technology options	Managing Workflow	Finding Competent Staff	Identifying opportunities for practice improvement and savings
3	Staying Informed on Technology	Finding Competent Staff	Identifying opportunities for practice improvement & savings	Finding Competent Staff
4	Identifying opportunities for practice improvement & savings	Staying Informed on Technology	Driving and implementing change	Offering value-added services over competition
5	Client Retention	Understanding Technology options	Understanding Technology options	Driving and implementing change

Source: Randy Johnston, *CPA Trendlines*

4 Common Mistakes to Avoid

- 1.) Ignoring diamonds in your backyard
- 2.) Waiting for the client to raise their hand

Cost segregation
Captive insurance
Charitable LLC

M&A Readiness
Vision Stitching
Recruiting

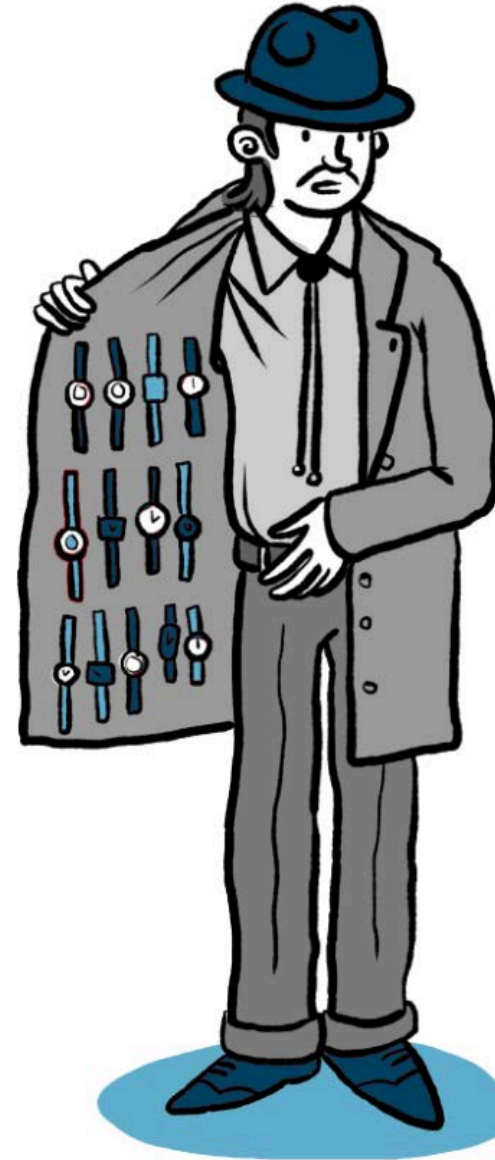
4 Common Mistakes to Avoid

1. Ignoring diamonds in your backyard
2. Waiting for the client to raise their hand
3. Determining direction on behalf of client



4 Common Mistakes to Avoid

- 1.) Ignoring diamonds in your backyard
- 2.) Waiting for the client to raise their hand
- 3.) Determining direction on behalf of client
- 4.) Selling watches



Psst . . .
want a
new watch
mate?

4 Building Blocks to Success

Look different

Separate traditional
services from value-
added services

Identify client needs

Access the
appropriate
expertise



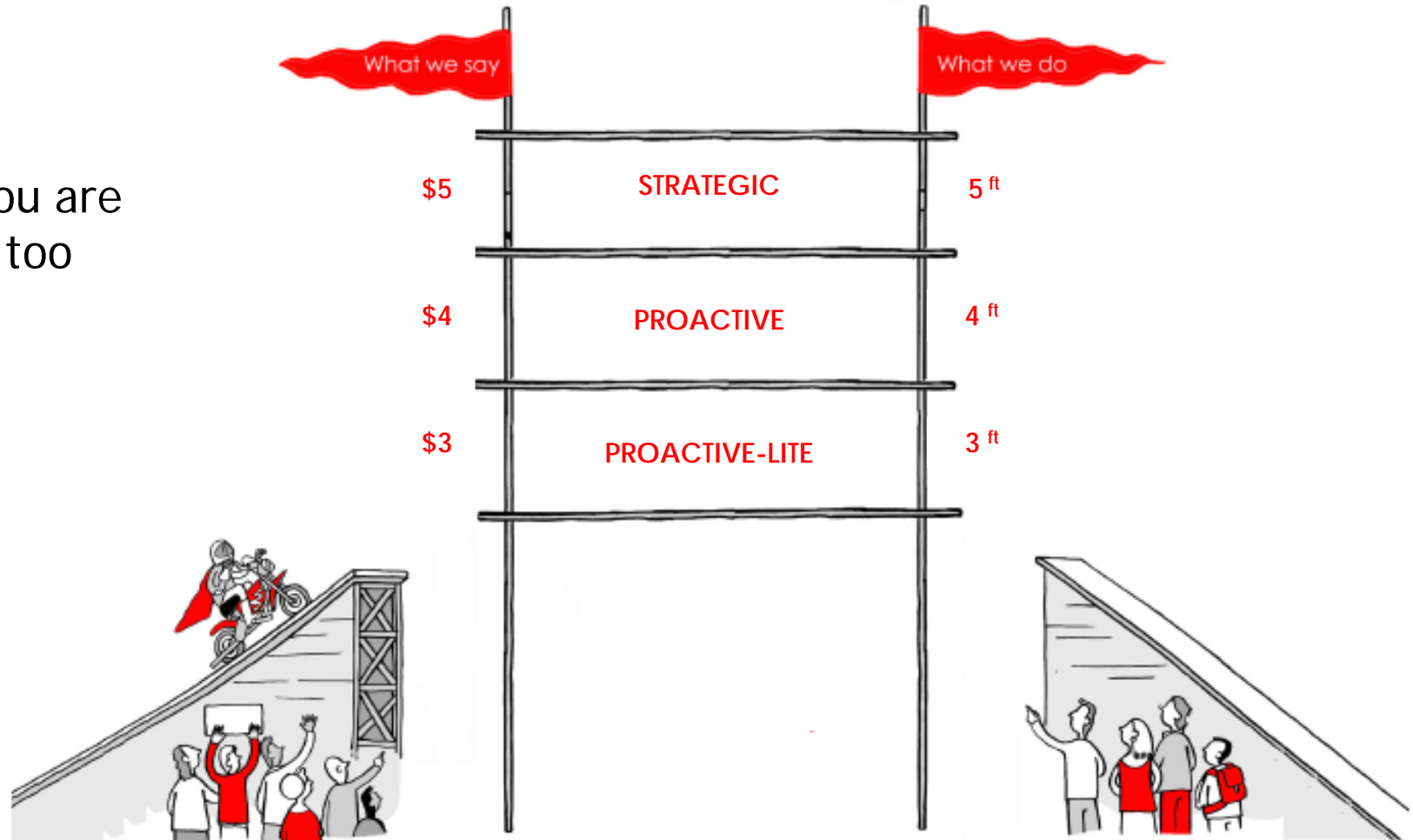
BUILDING BLOCK #1: Look Different

- His services are different
- His staff is different
- His clients are different
- His cash flow is different
- His life is different



BUILDING BLOCK #2: Separate traditional services from value-added work

- Separate services so that you are paid properly and don't do too much for the money!





How to Get Paid to be Proactive

THE BIG MINDSHIFT:
Go from “adding hours” to “adding value”

THE BEST WAY TO ADD VALUE
Become a Profit Center

Becoming a Profit Center

When you're making your clients more than they're paying you, it . . .

Changes how
they see you -
from a
'necessary cost'
to a 'valuable
asset'

Makes the fees
you charge
irrelevant

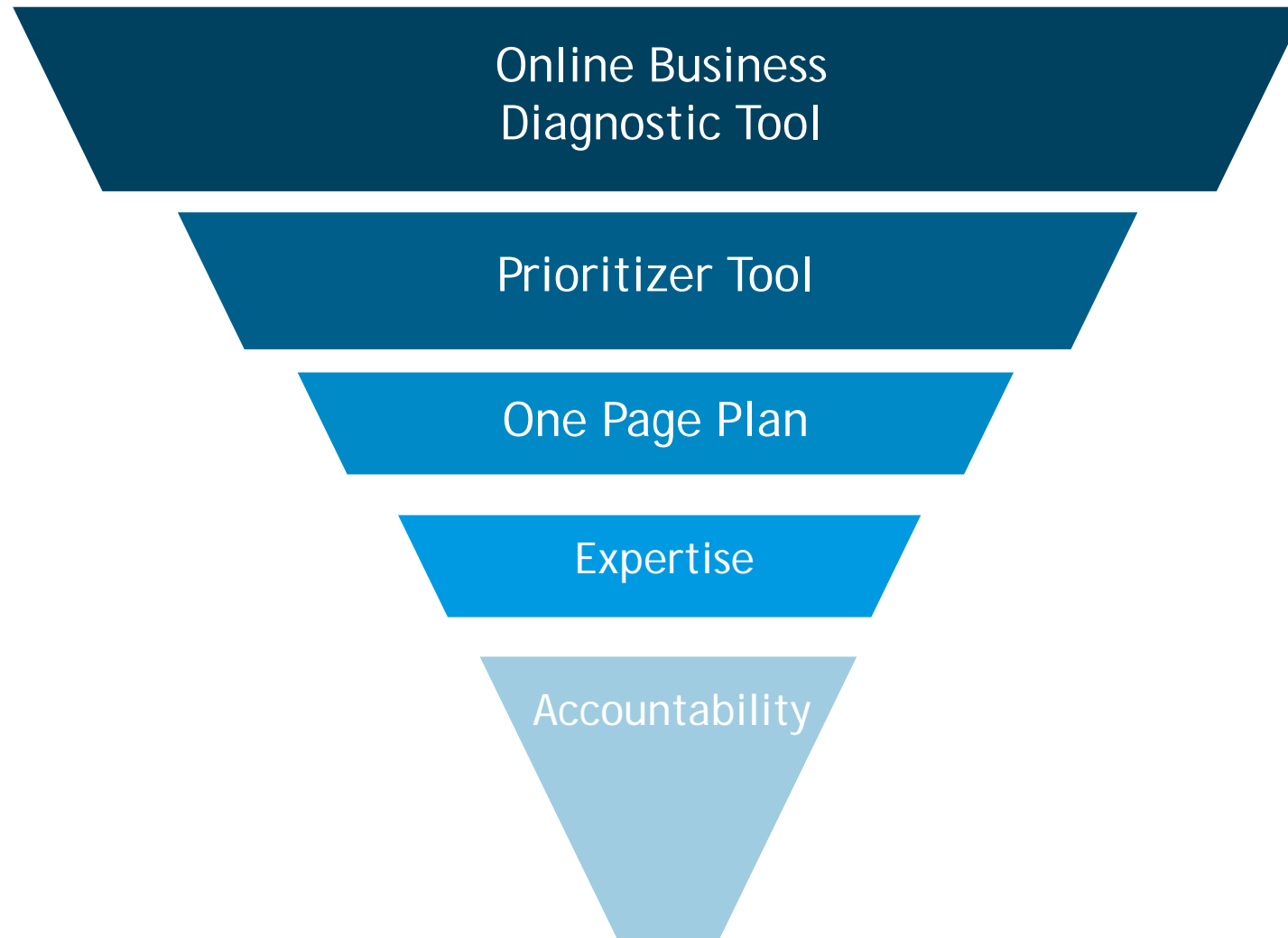
Improves client
'stickiness' and
boosts referrals



BUILDING BLOCK #3: Identify Needs via a Process

- A proactive process for finding the right solution
- Fills the pipeline with high margin work

The HRS Funnel



BUILDING BLOCK #4: Access to Experts

- Broadens your ability to solve problems
- Generates a 2nd revenue path
- Scalable



4 Building Blocks to Success

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Separate traditional
services from value-
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Identify client needs

Access the
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THANK YOU!



HAYDENROCK SOLUTIONS
— WE HAVE THE HOW —

Please Join Our Remaining Webinars at 2:00 p.m. Eastern

January 24:

A Peek Into a Proven System to Help You Become Your
Clients' Most Relevant Advisor

January 31:

How to Make 2018 Your Best Year Ever



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