

Our webinar will begin shortly.

Dial-in information:

800.832.0736

Room *9516215#

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

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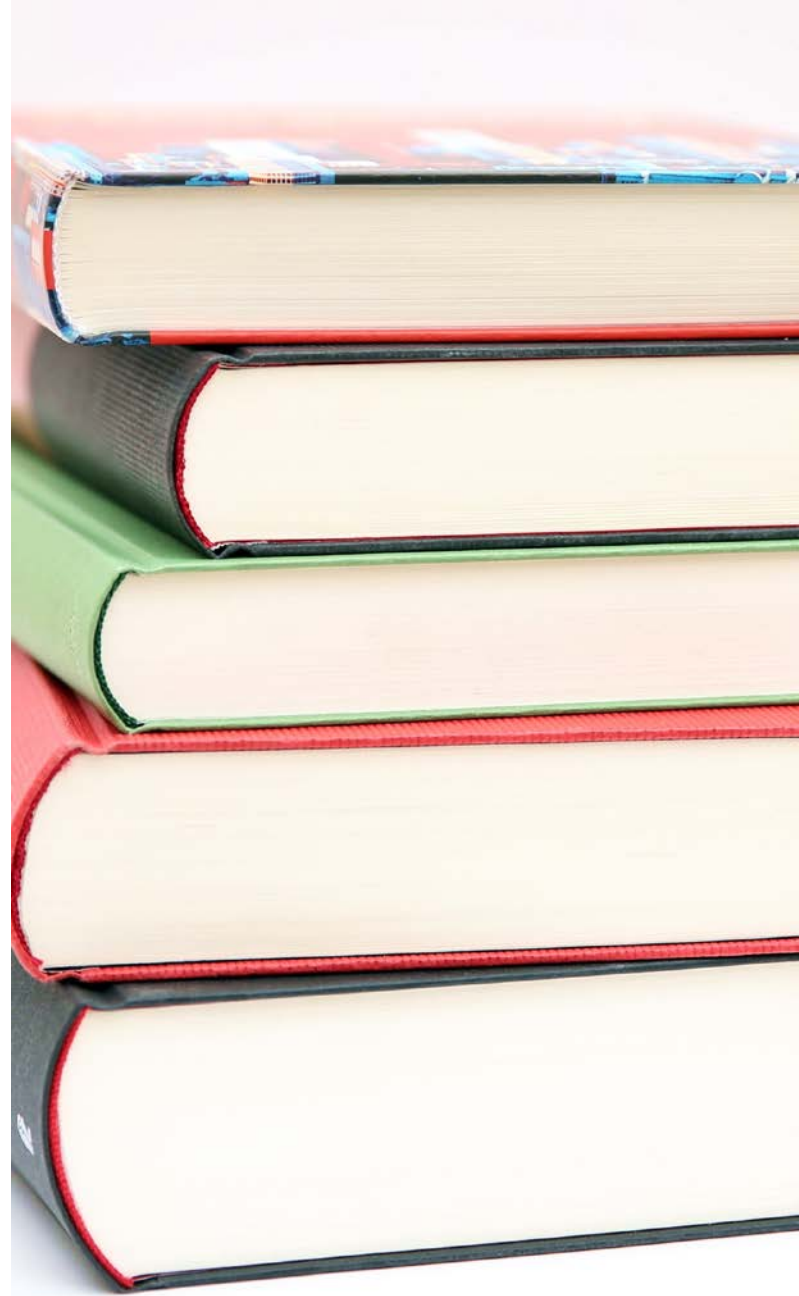


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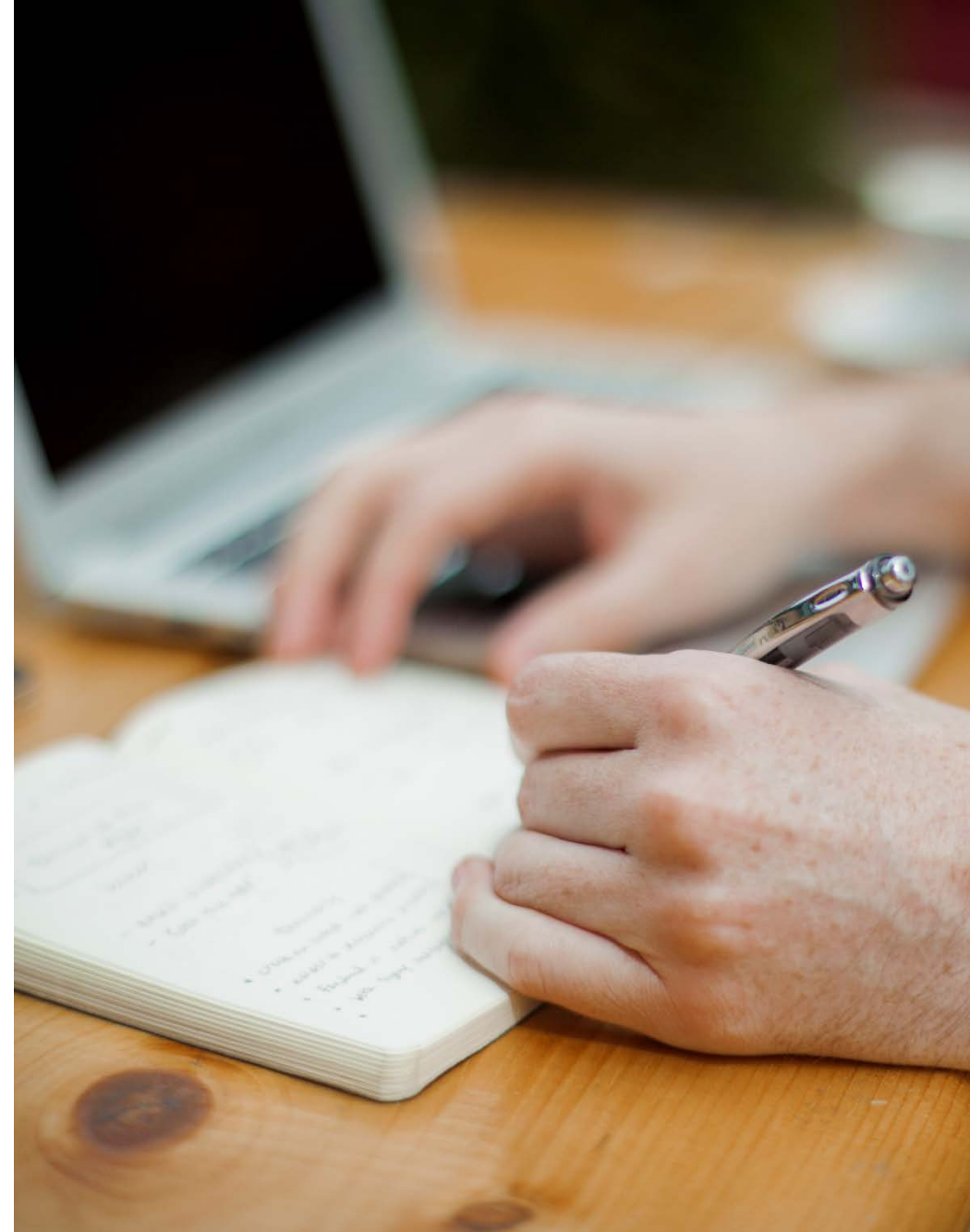
Course Overview

- 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. Week One Overview
2. 4 Common Mistakes to Avoid
3. 4 Building Blocks to Success
4. The HaydenRock System™ - Demo
5. Typical CPA Concerns
6. Next Steps
7. Questions



Week One Overview

Four Seismic Shifts driving accounting today

- Trend 1: Generating Tomorrow's Revenue
- Trend 2: Staffing Tomorrow's Accounting Firm
- Trend 3: Satisfying Tomorrow's Clients – The Business Model is Changing
- Trend 4: Building Tomorrow's Professional Service Firm

Estimated % of Advisory Revenue VS. Desired % of Advisory Revenue

AI & Blockchain

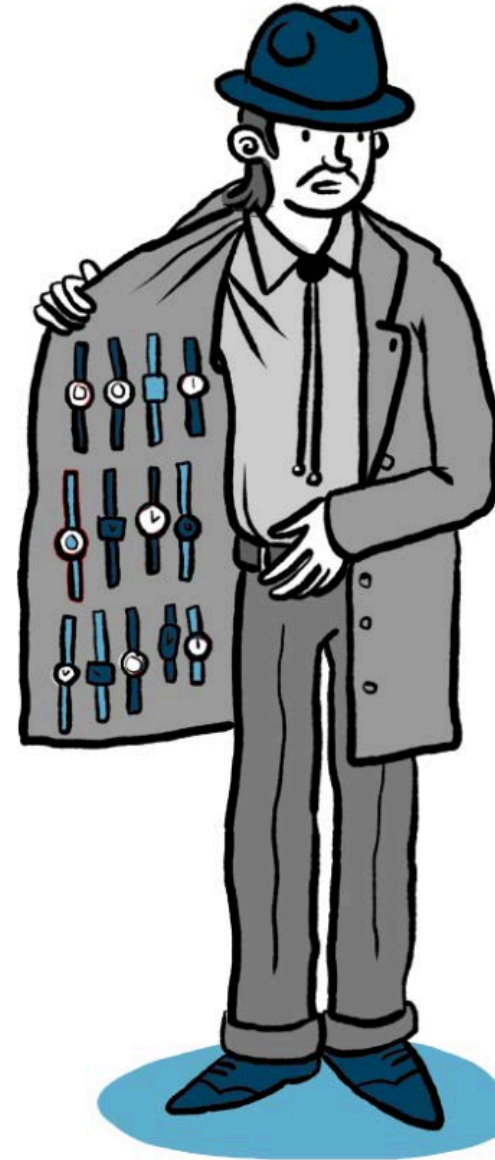
Revenue Potential

What types of Services



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

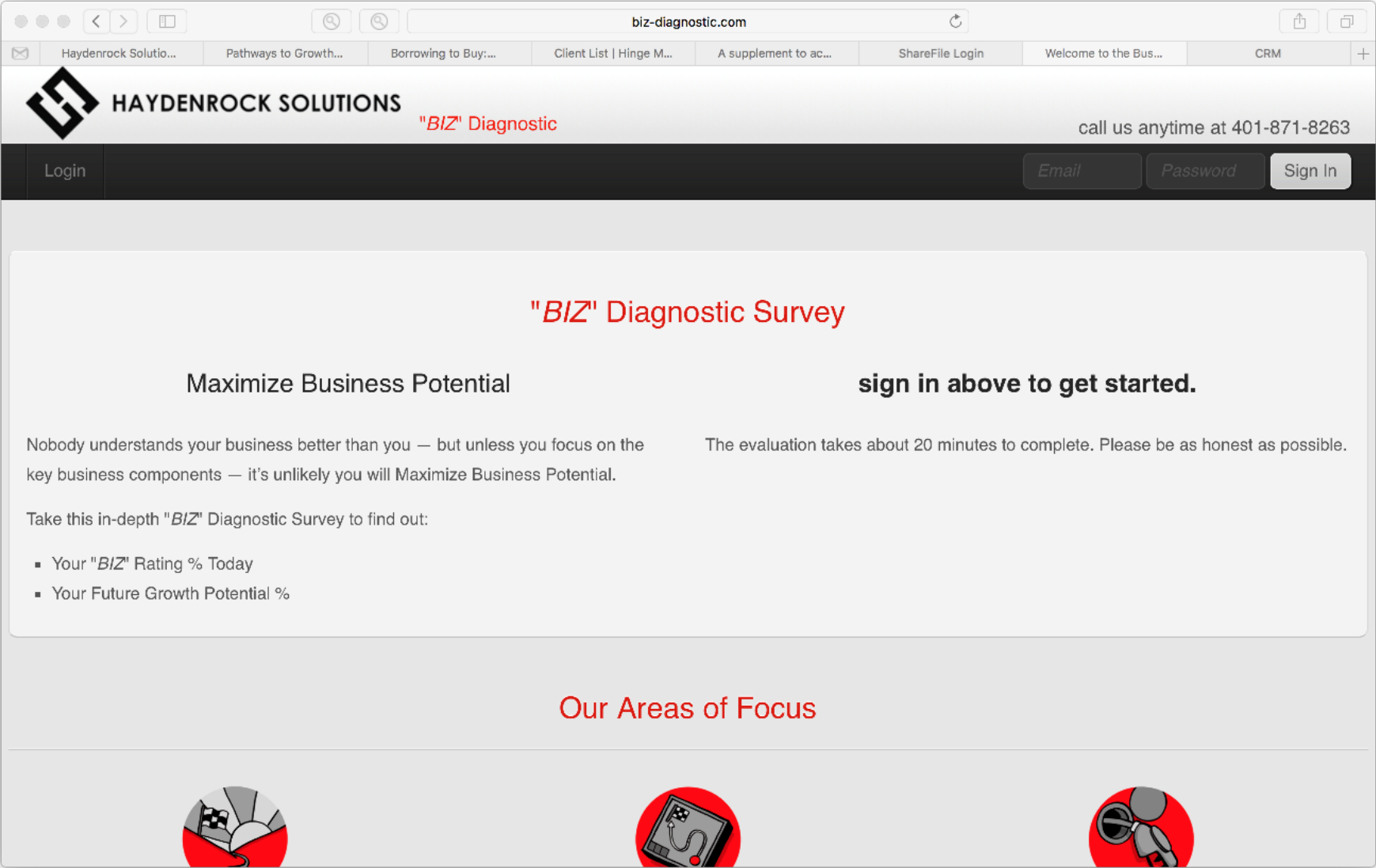
Separate traditional
services from value-
added services

Identify client needs

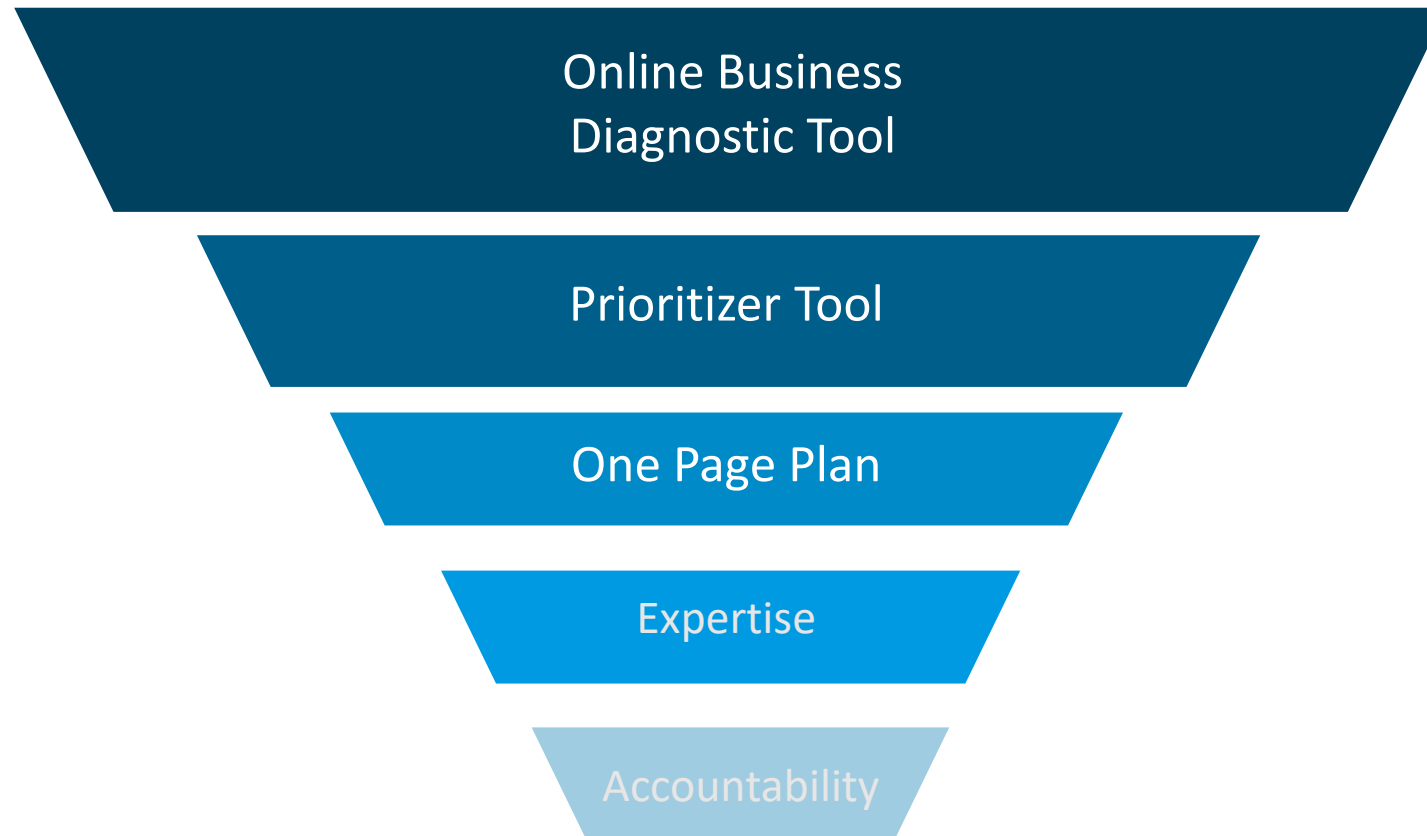
Access the
appropriate
expertise



The HaydenRock System™ - Demo



The HRS Funnel



Typical CPA Concerns

- I don't like change!
- Not sure I have the time – to train or execute?
- Sounds great – but will I be able to afford the cost?
- Do I have the right type of clients?
- Do I have skills/capabilities to provide advisory services?

Definition of insanity! . .

You keep doing the same things and expect something different to happen!

If you want your business to improve . . .
- you must make some changes happen
- but **change is not easy**



Next Steps

If you would like to schedule a demo to learn more please reach out to Capstone Marketing.

Jean Caragher

Capstone Marketing

[727.210.7306](tel:727.210.7306)

jcaragher@capstonemarketing.com



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THANK YOU!



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