

Using Compliance Work to Uncover Business Improvement Opportunities

The Challenge

The gap between value created and value captured

Your clients' perception of service value

You may be your biggest problem

The Opportunity

The industry value curve – where do you want to be on it?

What clients get versus what clients want

Moving from expert-for-hire to a business partner: assume the role of outsourced CFO

The 5 critical functions of a CFO that most SME's aren't getting

Why tax season + a tough economy give you a “perfect storm” opportunity

A strategic path to differentiate your firm

It all starts with a conversation

How to communicate to make a difference

We know you can talk, can you listen?

Killer questions to build empathy

What gets measured gets managed – are the right things being measured? Are the things being measured, being managed?

Conversation Starters

Oh I see! An elegant framework for helping your clients achieve results

The 4 ways to grow a business: a powerful tool to initiate conversation and provoke thought

How to review a set of annual financial reports in a way that actually makes sense to a business manager

Financial management 101: the course you should teach to all your business clients

Converting your conversation to a service solution offering: Your next step