

Advisory Services Playbook for Accounting Firms

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Quick Start Guide

DELIVER ADVISORY INSIGHTS IN 10 SIMPLE STEPS

Here's a concise **Quick Start Guide** to help you get up to speed with using **FinAnalytics** for delivering powerful advisory services. These 10 steps are designed for ease and clarity so you can start providing high-value insights to clients immediately.

1. Log In & Set Up Your Account

Go to the [FinAnalytics login page](#) and log in with your credentials. Set up your profile and preferences.

2. Add a New Client

Go to **Clients > Import from Xero** to select your Xero clients or **Clients > + Add Client**

Enter basic details: client name, location, industry, financial period, year-end, business description and size.

3. Upload Client Financial Data

From the selected client, go to **Financial Statements** then either **Import from Xero** or **+ Upload Statement**.

You can import/upload P&L and/or Balance Sheet

4. Enter Business Context

Fill in qualitative inputs:

- What significant events happened in the business during the period of the financials?
- Were there any key challenges?
- What are the client's strategic goals

The more information you give the AI, the better the insights generated.

5. Generate the Report

From the selected client, go to **Reports > Create Report** then select the report(s) you want to create for this client.

Your draft report will be ready in minutes.

Tip: The more reports you choose, the longer it will take to generate the report, so only select the ones you need.

6. Review & Customise Output

Review the report. You can:

- Add comments or notes
- Remove irrelevant insights
- Include your own recommendations

Tailor it for your client's needs.

7. Export & Share the Report

Download the report as a PDF and add your own branding (e.g. edit the PDF in Adobe Acrobat Pro).

8. Book the Advisory Meeting

Schedule a meeting with your client to present the report.

Use this session to:

- Walk through insights
- Discuss next steps
- Offer implementation support or ongoing advisory services where relevant

9. Record Actions & Follow-Up

Log any agreed actions, timelines, or next check-ins in your CRM. Set reminders.

10. Track Progress & Re-Analyse Regularly

Re-run the analysis quarterly or after any major business event. Track improvements and refine advice over time to build ongoing advisory relationships.

CONGRATULATIONS! YOU'RE READY TO ADVISE

In just a few steps, you've gone from compliance to confident advisory delivery, backed by data, confidential AI insights, and a straightforward client-focused process.

More Assistance

For more assistance in moving from compliance to advisory services within your firm, including templates you can copy and modify to suit, refer to the other chapters of this Playbook.



1. Introduction

PURPOSE OF THE PLAYBOOK

The purpose of this playbook is to help accounting firms confidently and consistently build a profitable advisory practice. It provides a clear, practical guide to identifying, selling, and delivering advisory services that go beyond traditional compliance work.

Whether you're a sole practitioner looking to grow your income or a mid-sized firm aiming to scale high-value services, this playbook is your roadmap for turning data into decisions, and decisions into results.

WHY ADVISORY SERVICES MATTER NOW MORE THAN EVER

The accounting profession is undergoing a profound shift. Technology has streamlined traditional compliance work, such as tax returns, bookkeeping, and payroll. Clients increasingly expect more. They want proactive insights, strategic advice, and support in navigating uncertainty.

By offering advisory services, firms can:

- Deliver deeper value to clients
- Build stronger, longer-term relationships
- Diversify revenue streams beyond compliance
- Improve job satisfaction and team retention by focusing on problem-solving, not just data entry

In a rapidly changing business environment, clients need advisors who understand their numbers and what those numbers mean for their future. This is your opportunity.

SHIFTING FROM COMPLIANCE TO VALUE-DRIVEN CLIENT RELATIONSHIPS

Advisory services help reposition your firm as a trusted partner in your client's growth. Instead of only interacting at tax time, you can build continuous relationships centred on insights, not inputs.

This shift transforms conversations:

- From “What was your profit last year?”
- To “Here's how you can improve profitability going forward.”

It also changes your role:

- From the service provider
- To the strategic advisor

This shift doesn't mean abandoning compliance work. Rather, it's about layering advisory insights on top of compliance and using FinAnalytics to make that easy, efficient, and scalable.

HOW THIS PLAYBOOK HELPS YOU GROW REVENUE AND CLIENT IMPACT

This playbook gives you the tools, language, and structure to start and grow your advisory services with confidence. It will show you how to:

- Identify clients who need help (and are willing to pay for it)
- Use data to surface opportunities and drive conversations
- Package and price your services effectively
- Systematise delivery so it's not reliant on one key person
- Build a scalable advisory workflow using FinAnalytics

By following this guide, your firm can strengthen its competitive advantage, deepen client relationships, and unlock new income streams, all while positioning your team for long-term success in a rapidly evolving profession.



2. Understanding the Opportunity

MARKET TRENDS: FROM COMPLIANCE TO STRATEGIC VALUE

The accounting profession is experiencing a structural transformation. The increasing automation of compliance tasks (e.g. bookkeeping, tax lodgement, BAS preparation) is driving down margins and reducing the perceived value of these services. At the same time, business owners are facing unprecedented uncertainty: rising costs, labour shortages, inflation, supply chain disruptions, and digital disruption.

This creates a new opportunity: **accountants as interpreters of business reality**. Clients don't just want reports ... they want answers. They want someone to tell them:

- What's working and what's not
- Where the risks lie
- What actions to take

Advisory services deliver precisely that.

THE VALUE PROPOSITION OF ADVISORY WORK

Unlike compliance work, advisory services are:

- **Proactive:** Based on real-time data and forward-looking insights
- **Personalised:** Tailored to each client's unique challenges and goals
- **Strategic:** Helping clients make better decisions, not just stay compliant

Advisory services build stickier, more profitable client relationships. They move your firm from transactional interactions to ongoing, high-trust partnerships where clients turn to you not just for tax returns, but for guidance, direction, and support.

THE EVOLVING ROLE OF THE ACCOUNTANT

Traditionally, accountants have been seen as record-keepers or “historians” of financial activity.

But technology, including AI tools like FinAnalytics, enables accountants to take on a new role:

- **From:** Technician → **To:** Translator
- **From:** Data compiler → **To:** Insight generator
- **From:** Reactive responder → **To:** Proactive advisor

This new role is more impactful, more satisfying, and more profitable. It positions you as indispensable to your client’s business success.

COMMON ADVISORY SERVICES TO OFFER

Advisory services come in many forms. You don’t need to be a management consultant; you just need to help your clients understand their numbers and take action.

Some common services include:

- **Financial Health Reviews**
Analyse key ratios, compare to benchmarks, and highlight areas for improvement.
- **Cash Flow Forecasting**
Help clients avoid cash shortfalls and plan for investments or debt repayments.
- **Scenario Planning & What-If Analysis**
Model the financial impact of growth plans, staffing changes, price adjustments, or cost pressures.
- **KPI Reporting & Monitoring**
Build simple dashboards to track business performance and flag early warning signs.
- **Strategic Planning Support**
Guide clients through business planning, growth strategies, or succession planning.

All of these services and more are identified, assisted, and streamlined by FinAnalytics, which turns raw financial data into actionable insights quickly and reliably.

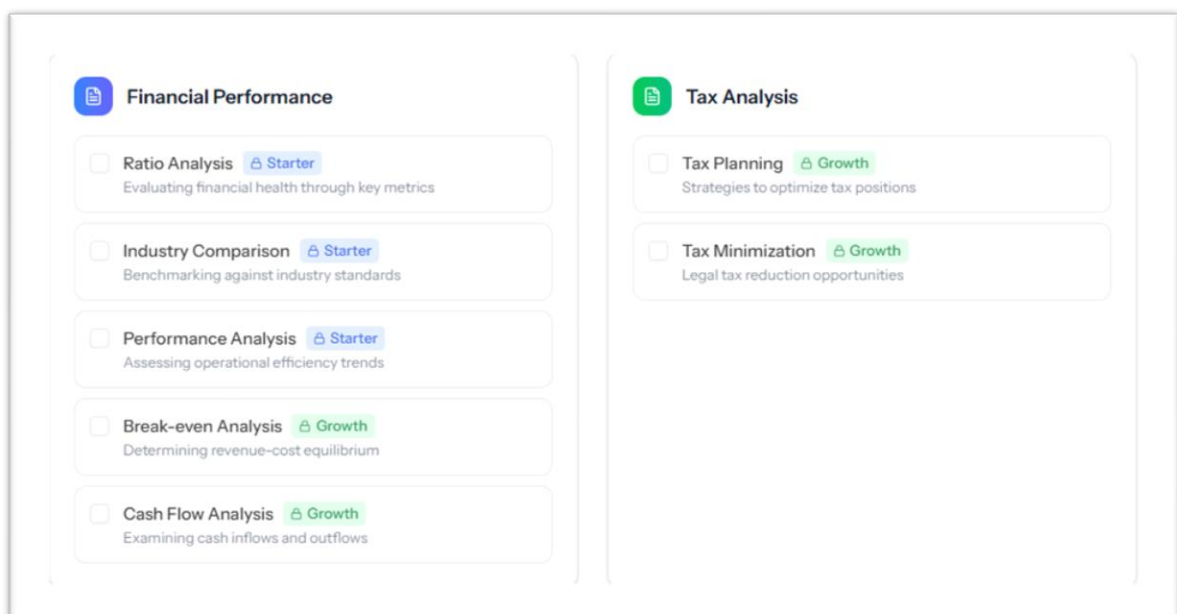


Figure 1: A few of the reports FinAnalytics generates in minutes



3. Identifying Advisory Opportunities in Your Client Base

One of the fastest ways to grow your advisory revenue is to identify which clients already need help ... and are most likely to pay for it. Instead of trying to offer everything to everyone, this section helps you pinpoint the best-fit clients and services using a structured approach.

SEGMENTING YOUR CLIENT BASE STRATEGICALLY

Start by segmenting your clients into meaningful groups based on characteristics such as:

- **Business size** (micro, small, medium)
- **Industry** (retail, construction, professional services, etc.)
- **Growth stage** (startup, scaling, mature)
- **Advisory readiness** (based on previous discussions or responsiveness)

Use these segments to determine where your firm can have the greatest advisory impact. For example:

- Small businesses often need help with cash flow forecasting.
- Scaling businesses benefit from KPI dashboards and scenario planning.
- Stagnant or declining clients may require a financial health check.

This simple segmentation helps prioritise effort and messaging.

USING DATA TO SPOT ADVISORY TRIGGERS

Your client's financial data contains powerful clues about where advisory services can make a difference. Here are common triggers to watch for:

Trigger	Potential Advisory Service
Declining gross profit margin	Pricing review, cost analysis
High accounts receivable	Debtor management and cash flow forecasting
Rapid sales growth	Scenario planning, resource planning
Unused borrowing capacity	Capital planning or reinvestment strategy
Negative working capital	Working capital improvement advice
Large inventory build-up	Inventory management consulting
Frequent cash shortfalls	13-week cash flow forecasting

FinAnalytics' reports surface these triggers in your clients' reports, saving hours of manual review and helping you start proactive conversations.

FINANALYTICS: A SMART ASSISTANT FOR OPPORTUNITY SPOTTING

FinAnalytics acts as your advisory radar, analysing client financials and highlighting:

- Key performance trends
- Benchmark gaps vs. industry norms
- Risk indicators (e.g. excessive leverage or deteriorating liquidity)
- Suggested discussion points tailored to each client
- Suggestions on new products and services your client may want to consider

The system also generates marketing prompts to help position these insights as services, creating a natural and value-driven upsell path.

CREATING A CLIENT WATCHLIST

Use your CRM or a simple spreadsheet to maintain a **Client Advisory Watchlist**. Include:

- Client name
- Triggered advisory opportunity
- Potential service offering
- Assigned team member
- Last contact date
- Follow-up action

Review this list monthly in team meetings to keep your advisory pipeline moving and build firm-wide awareness of where value can be added. See the example at *Appendix A: Client Advisory Opportunities Template* on page 37 below.

QUICK WINS: TARGETING LOW-HANGING FRUIT

For fast impact, start with:

- Clients you've already helped informally: formalise it as a paid advisory service.
- Clients asking lots of questions: they're signalling interest in more than just compliance.
- Clients in distress: they're likely to value support and may become long-term advisory clients if helped through a tough patch.

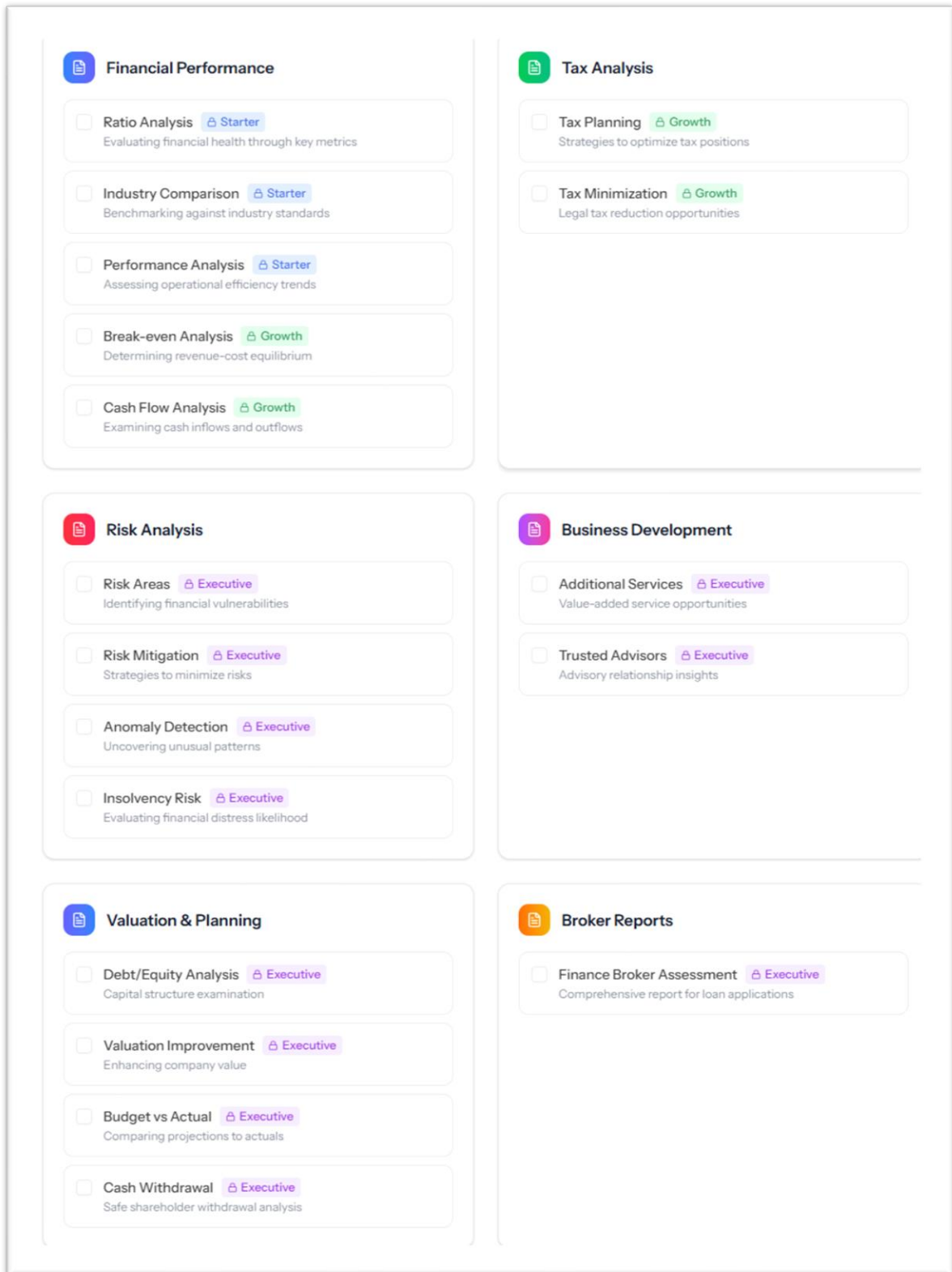


Figure 2: FinAnalytics provides a comprehensive range of reports that you can use to develop your advisory practice



4. Creating an Advisory Services Offering

Once you've identified advisory opportunities, the next step is to design structured, sellable offerings. Many accountants offer advice informally and ad hoc, but the goal here is to formalise those services into packages that clients understand, value, and are willing to pay for.

DESIGNING YOUR ADVISORY PACKAGES

Advisory services can be delivered in different formats depending on client needs and your firm's capacity. Consider structuring offerings into these common models:

1. One-off Advisory Reports

- Delivered when specific issues arise (e.g. cash flow crisis, declining margins)
- Use FinAnalytics to generate insight-rich reports and recommendations
- Charge a fixed fee or bundle with compliance services

2. Monthly or Quarterly Review Packages

- Scheduled meetings supported by regular reports
- Helps clients stay accountable and track performance
- Use FinAnalytics as the foundation to help you build recurring advisory revenue

3. Virtual CFO Services

- High-touch offering for growing businesses
- Includes forecasting, budgeting, strategic advice, and regular decision support
- Ideal for mid-sized clients who need financial leadership but can't justify a full-time hire


4. Business Improvement Programs

- Structured programs (e.g. 3-6 months) focused on specific outcomes like increasing profit, improving cash flow, or preparing for exit
- Delivered via a series of sessions and actions, backed by analytics

PRICING YOUR ADVISORY SERVICES

Pricing advisory services doesn't have to be complicated. Here are some simple approaches:

- **Value-based pricing:** Link fees to the value you're providing (e.g. helping save \$50k in cash leakage)
- **Tiered packages:** Bronze / Silver / Gold levels with increasing touchpoints and depth
- **Bundling:** Combine advisory reports with compliance services and other helpful resources (e.g. templates, guides, newsletters, reports etc that are valued at \$X. You'll include these only if the client signs up by [date]). These increase the value to the client, provide a reason to get started, distinguish your offer from other accountants so there's less competition, and also increase the fees you generate.
- **Fixed fees:** Provide clarity and remove fear of "bill shock"
- **Consider Offering a Guarantee:** e.g. "Try your first report risk-free. If you don't find at least 3 valuable insights that could improve your business performance, you won't pay a cent. We believe in outcomes, not just outputs." Guarantees are a great way to reduce the risk from the client's perspective.

 *Tip: Use FinAnalytics to quickly generate insights, allowing you to maintain strong margins while delivering high value.*

COMMUNICATING THE VALUE TO CLIENTS

Advisory services can feel abstract to clients. Use these tools to make your offering tangible:

- **Client-centric language:** Focus on outcomes like "improving cash flow" or "planning for growth" instead of technical jargon
- **Visual reports:** Use the graphics and commentary from FinAnalytics to help clients see what's happening in their business
- **Client stories or examples:** Show how similar businesses have benefited from your advice

TEMPLATES FOR STANDARDISED OFFERINGS

To streamline delivery and reduce friction, prepare templates for:

- Advisory service descriptions (for your website or proposals)
- Pricing menus or tiered options
- Proposal documents with scope, outcomes, and fees
- Advisory report cover letters or summaries

Standardisation allows you to scale advisory services without reinventing the wheel every time.

EXAMPLE

See an example of what this could look like in the Appendices below. Feel free to modify these to suit your firm.

Executive Overview

1. Report Overview

1.1 Executive Summary

Lendlease has achieved a remarkable financial turnaround in FY2025, delivering a \$225m profit after tax compared to the devastating \$1.5 billion loss in FY2024. This transformation reflects successful execution of the company's strategic restructuring and asset disposal programme, though operational challenges persist that require ongoing management attention.



Key Financial Metrics:

Figure 3: Sample output from FinAnalytics

Note that all reports can be customised: colours, fonts, logos etc. Everything can be matched to your own branding and style guidelines.



5. Selling Advisory Services

Even the most valuable advisory offering won't make an impact unless it's successfully communicated and adopted by clients. This section helps you move from opportunity to revenue by providing a structured, confidence-building approach to **selling advisory services** ... without ever feeling "salesy".

HOW TO START THE CONVERSATION

Often, clients don't realise they need advisory services until you point out the risks or opportunities hidden in their numbers. You can initiate the conversation by:

- **Using insights from FinAnalytics:** Let the numbers speak. Start with, *"We've run your latest figures through a diagnostic tool, and a few things stood out..."*
- **Relating to a client question:** *"You mentioned you may want to retire soon ... we have a tool that we can use to show you how an external investor would look at your company ... in minutes."*
- **Asking future-focused questions:** *"What are your growth goals for the next 12 months?"*
"Do you know what's driving your profit margins?"

The key is to start with genuine curiosity and a problem-solving mindset ... not a sales pitch.

USING DATA FROM FINANALYTICS AS A SALES TOOL

FinAnalytics helps you shift advisory conversations from guesswork to evidence. It equips you with:

- **Clear visuals:** Graphs and charts that make financial concepts easy to understand
- **Industry benchmarks:** Show how clients compare to others in their sector

- **Commentary prompts:** AI-generated insights that highlight financial red flags or opportunities

Use these elements in your meetings, reports, and emails to demonstrate value instantly.

OVERCOMING OBJECTIONS AND POSITIONING VALUE

Clients may hesitate to pay for advice they used to get for free. Address this with confidence by:

- **Linking advice to outcomes:**
“This service helped another client increase their net profit by 8% in six months.”
- **Framing it as future protection:**
“Think of this like insurance against nasty financial surprises.”
- **Highlighting ROI:**
“For \$1,200 per quarter, we’ll help you identify and act on opportunities that could return ten times that.”
- **Offering a test drive:**
“Let’s do a one-off Financial Health Review. If it’s not valuable, you don’t have to go any further.”

SCRIPTS AND CONVERSATION STARTERS

To help you get going, here are a few ready-to-use prompts for different scenarios:

- **Cash Flow Focused**
“We’ve noticed some irregularity in your cash cycle ... have you considered a forecast to prevent shortfalls?”
- **Growth-Minded Client**
“You’re growing quickly ... let’s model your best- and worst-case scenarios so you can plan ahead.”
- **Underperforming Business**
“Your gross profit margins are below industry benchmarks. Let’s have a closer look at what’s going on.”
- **Year-End Discussion**
“As we wrap up this year, it’s a perfect time to identify where you can improve performance next year. We can help with that.”

INTERNAL ROLE-PLAYING AND TEAM ENABLEMENT

To help your team get comfortable with advisory conversations:

- **Hold monthly internal training** with role-playing using real client data (anonymised)
- **Create cheat sheets** with common triggers, objections, and response prompts
- **Encourage a mindset shift:** remind staff that you’re not selling, you’re helping clients succeed

The more familiar your team becomes with these conversations, the more natural and effective they’ll be.

See the sample guide at *Appendix H: Advisory Conversation Cheat Sheet* below.

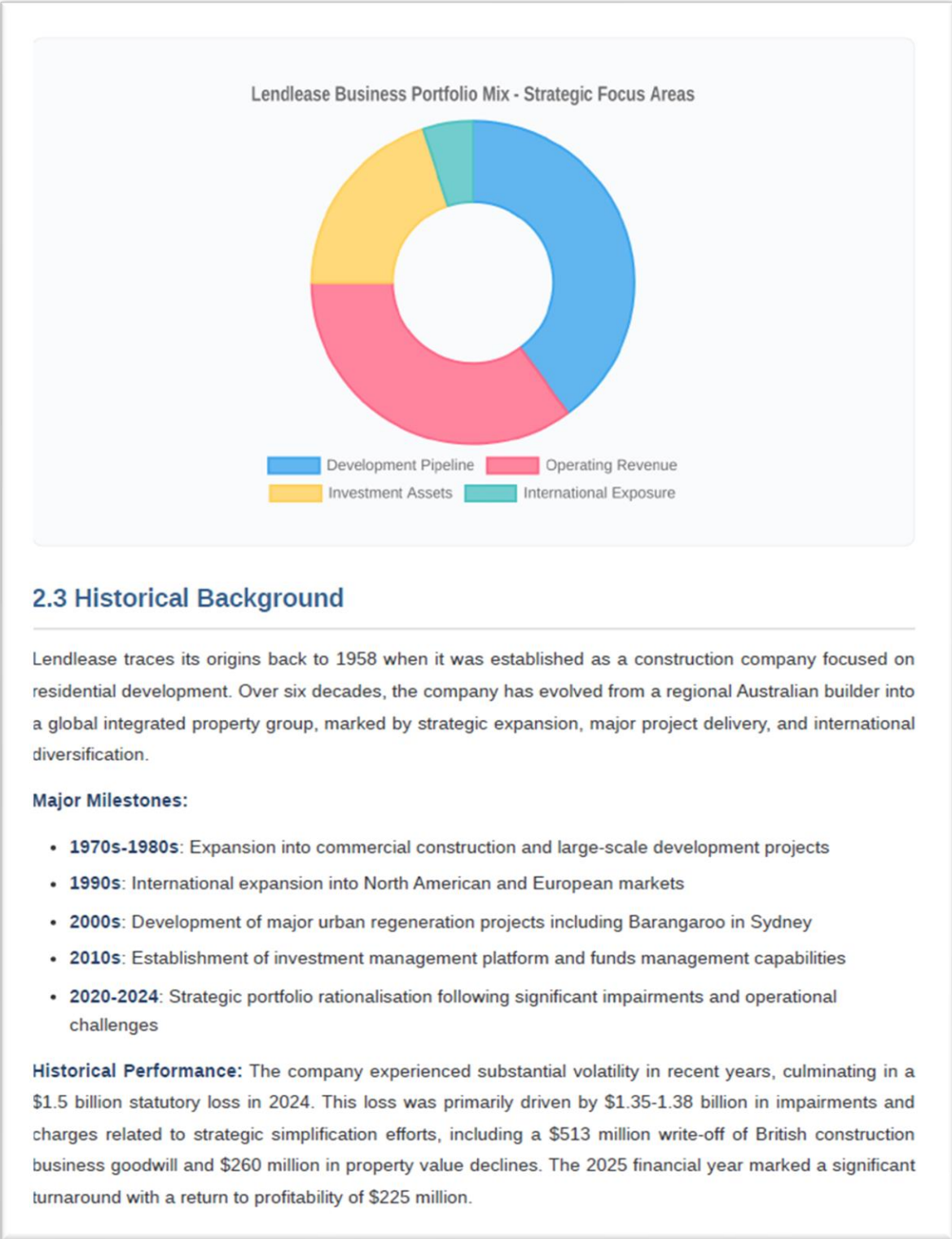


Figure 4: Each page in FinAnalytics is crafted by AI but remains editable by you



6. Delivering Advisory Services Efficiently

A common challenge for accounting firms is delivering advisory services in a way that's scalable, repeatable, and profitable ... without draining senior staff time. This section helps you build efficient workflows to deliver high-value advice while keeping costs and time under control.

ADVISORY WORKFLOWS: FROM INSIGHT TO ACTION

Delivering great advisory services is about more than just generating reports ... it's about creating a repeatable process that turns numbers into insights and insights into actions. A simple workflow looks like this:

1. Data Collection

- Pull financial data from Xero, QuickBooks, or Excel.
- Supplement with business context (e.g. changes in operations, market challenges).
- Use FinAnalytics to simplify and speed this process.

2. Automated Analysis

- Run the data through FinAnalytics to identify key trends, risks, and opportunities.
- Review the AI-generated commentary and tailor it for the client.
- Add your own commentary using the knowledge you have about the client.

3. Interpretation and Recommendations

- Prioritise 2–3 actionable recommendations per meeting/report.

4. Client Communication

- Deliver the insights through a report, video summary, or live meeting.
- Use visuals and benchmarks to make insights easy to understand.

5. Follow-Up and Accountability

- Schedule regular reviews to track progress.
- Use these meetings to upsell or expand into additional advisory services.

USING FINANALYTICS TO STREAMLINE DELIVERY

FinAnalytics dramatically reduces the time it takes to:

- Analyse financial data
- Write commentary
- Prepare reports
- Generate conversation starters

With FinAnalytics, your team can go from raw numbers to comprehensive, ready-to-deliver insights in minutes ... freeing up time to focus on interpretation and client relationships.


Benefits:

- **Consistent delivery quality** across the firm
- **Standardised language** that can be customised
- **Scalable reporting** even with limited advisory staff

STRUCTURING ADVISORY MEETINGS FOR IMPACT

Whether virtual or in-person, advisory meetings should be focused, efficient, and valuable. Use a simple structure:

1. **Recap:** Review what was discussed or implemented last time.
2. **Review:** Present the latest report or analysis.
3. **Discuss:** Invite questions and explore root causes.
4. **Advise:** Offer 2–3 recommended actions.
5. **Assign:** Clarify who's doing what by when.
6. **Schedule:** Lock in the next meeting and follow-up.

 *Tip: Provide a one-page summary with key findings and actions after each session to keep clients engaged and accountable.*

TEMPLATED DELIVERABLES TO SAVE TIME

Build a library of reusable templates to streamline delivery:

- Financial Health Review template
- One-page Executive Summary
- Advisory meeting agenda
- Follow-up email with actions
- Proposal templates for deeper work (e.g. 3-month improvement plans)

Standardising delivery improves efficiency and creates a more consistent client experience.

Analysis Summary

Analysis Summaries

Overview of Analyses

This section provides easy-to-understand summaries of the following analyses:

- **Industry Comparison:** Key insights about Lendlease's industry comparison
- **Break-even Analysis:** Key insights about Lendlease's break-even analysis
- **Cash Flow Analysis:** Key insights about Lendlease's cash flow analysis
- **Debt/Equity Analysis:** Key insights about Lendlease's debt/equity analysis
- **Risk Mitigation:** Key insights about Lendlease's risk mitigation
- **Risk Areas:** Key insights about Lendlease's risk areas

Each summary highlights the most important findings and business implications in clear, non-technical language. For detailed analysis including charts and technical details, please refer to the corresponding detailed analysis in the index section.

Summary Highlights

Below are the key takeaways from all analyses:

Lendlease Financial Analysis Highlights

Key Performance Summary

- **Remarkable Turnaround:** Lendlease recovered from a devastating \$1.5 billion loss in 2024 to achieve \$225 million profit in 2025, demonstrating strong operational resilience
- **Cash Flow Concerns:** Despite profitability recovery, the company faces significant cash flow challenges with an \$820 million decline in operating cash flow, creating liquidity pressures
- **Industry Position:** Outperforming construction industry peers in profitability recovery, though still operating below optimal efficiency levels
- **Capital Structure:** Successfully improved debt-to-equity position following the turnaround, but debt management remains critical for sustained recovery

Figure 5: Let AI do the hard work so that all you need to do is review & finesse



7. Scaling Your Advisory Practice

After establishing your advisory services and building confidence with a few clients, the next step is to **scale** your offering into a consistent, firm-wide revenue stream. This section focuses on how to embed advisory into your business model, empower your team, and grow sustainably.


TRAIN AND EMPOWER YOUR TEAM

Scaling advisory work requires more than just tools ... it requires people. Your entire team should:

- Understand the value of advisory services
- Know how to spot opportunities
- Feel confident in having initial conversations with clients

Action steps:

- Run internal training on how to read FinAnalytics reports and translate findings into advice.
- Create quick-reference guides or “cheat sheets” with talking points and common recommendations.
- Encourage junior team members to bring advisory opportunities to partners.

 *Tip: Involve the whole firm ... admin staff, bookkeepers, and junior accountants often have close client relationships and can be great sources of insight.*

BUILD REPEATABLE ADVISORY PROCESSES

Create standard operating procedures (SOPs) for:

- Onboarding clients to advisory services

- Scheduling regular advisory check-ins
- Using FinAnalytics for all your client reviews
- Assigning team members based on service complexity

Templates to prepare:

- Advisory engagement letters
- Implementation checklists
- Client follow-up email templates

Standardisation ensures quality, consistency, and efficiency ... even as your advisory workload grows.

EMBED FINANALYTICS INTO CLIENT WORKFLOWS

Use FinAnalytics as a default part of:

- Annual review meetings
- Mid-year health checks
- BAS review periods
- Tax planning sessions

Position it not as an extra, but as a **value-adding layer** on top of your existing services.

Examples:

- “We include a complimentary financial health check every year using FinAnalytics.”
- “Your quarterly review includes benchmarking to help you stay ahead of the competition.”

This builds client expectations and makes advisory part of your firm’s brand.

CREATE A TIERED ADVISORY OFFERING

Structure your services into **scalable tiers** that match different client needs and budgets:

Tier	Ideal For	Includes
Lite	Micro businesses	Annual review, basic FinAnalytics report
Standard	Small-to-medium businesses	Quarterly meetings, full advisory reports
Premium	Growth-oriented clients	Monthly insights, forecasting, virtual CFO service

This helps systematise your offering and provides a clear upgrade path for clients.

USE TECHNOLOGY TO DELIVER AT SCALE

Automation is key to scaling. Use:

- **FinAnalytics** for report generation and opportunity spotting

- **CRM tools** to manage advisory pipelines
- **Meeting booking apps** for regular advisory sessions
- **Document templates** for proposals, plans, and summaries

The less time spent on admin, the more time you have for high-value conversations.

SET FIRM-WIDE ADVISORY KPIS

Track and review metrics such as:

- % of clients receiving advisory services
- Advisory revenue per client
- Average advisory fees per quarter
- Client satisfaction scores
- Team participation in advisory delivery

Discuss these in partner meetings to maintain focus and momentum.



Figure 6: FinAnalytics allows you to scale your advisory business by producing consistent results



8. Measuring Success

To build a sustainable and profitable advisory practice, it's essential to track the right metrics. This section outlines how to measure your success, identify areas for improvement, and demonstrate the tangible value of your advisory services to clients and your firm.

WHY METRICS MATTER

Tracking the right data allows you to:

- Evaluate the effectiveness of your advisory services
- Justify your fees to clients by showing real outcomes
- Monitor team performance and accountability
- Inform decisions about pricing, staffing, and service expansion
- Improve client retention by demonstrating consistent value

KEY ADVISORY KPIS TO TRACK

Metric	What it Tells You
% of clients receiving advisory services	Your penetration rate: how well advisory is adopted across your base
Advisory revenue per client	The average advisory value being delivered
Client satisfaction or Net Promoter Score (NPS)	How clients perceive the value of your advisory work
Client retention rate	Whether advisory work is strengthening loyalty and engagement

Uplift in client performance (e.g. profit margin, cash flow)	Tangible improvements that justify your advice
Time spent vs. revenue earned	Your efficiency and the profitability of delivery
Team participation in advisory	Engagement of staff across the firm in advisory work

 *Tip: Track these KPIs quarterly and discuss them in your partner or leadership meetings.*

TOOLS FOR TRACKING RESULTS

- **CRM and job management software**
Use tags or custom fields to track which clients are receiving advisory services, frequency of contact, and revenue earned.
- **Client surveys**
Short post-service surveys can help track satisfaction and uncover new needs.
- **Internal review sheets**
After each advisory engagement, conduct a quick debrief: What went well? What could improve? Were goals met?
- **Power BI dashboards**
Monitor client performance improvements, benchmarks, plus all the items above over time using Power BI. This provides a great way to demonstrate ROI.

DEMONSTRATING VALUE TO CLIENTS

Don't assume clients remember or understand the impact of your work. Reinforce value by:

- Including “before vs. after” comparisons in reports
- Sharing KPIs (e.g. improved debtor days or margin growth)
- Scheduling an annual “value meeting” to reflect on results and plan next steps

Position yourself not just as a service provider, but as a partner in their success story.

USING INSIGHTS TO IMPROVE AND GROW

Once you're tracking the right data, you can use it to:

- Refine your service packages
- Adjust pricing based on real delivery costs
- Focus marketing on your most successful services
- Train your team to deliver better outcomes, faster

CELEBRATE WINS

Make advisory results visible inside the firm:

- Share client success stories at team meetings
- Highlight wins in internal newsletters or dashboards
- Recognise team members who've helped grow advisory income

This builds a positive culture around advisory work and keeps everyone focused on adding value.

Recommendations

Recommendations and Action Plan

Key Findings Summary

Lendlease has achieved a remarkable turnaround, returning to \$225m profitability after the devastating \$1.5b loss in 2024. However, this recovery masks critical operational challenges that require immediate attention. The company faces a dangerous liquidity position with negative \$820m operating cash flows, a deteriorated current ratio of 0.82, and compressed margins at 7.1%. While strategic simplification and asset disposals have stabilised the balance sheet, fundamental operational weaknesses threaten sustainable growth.



Figure 7: Insert your own recommendations alongside the AI

- Comments

Refer example at *Appendix A: Client Advisory Opportunities Template* on page 37 below.

Advisory Proposal Template

A professional, editable document to present your advisory offering to clients, including:

- Executive summary
- Introduction
- Identified issues
- Proposed solution
- Assumptions and exceptions
- Outcomes/benefits/value to the client
- References/examples of prior work
- Scope of services
- Investment, ROI & next steps

Refer example at *Appendix C: Advisory Proposal Template* on page 41 below.

Financial Health Review Report (Editable)

Standardised layout with:

- What is currently going well
- What risks should the organization be aware of
- Top 3 action recommendations
- Key ratios
- Benchmarks and performance analysis
- Break-even analysis
- Cash flow analysis
- Options for cash withdrawal or dividend payments (if applicable)
- Tax advice
- Suggestions for new products and services
- Commentary, advice and analysis from FinAnalytics

Use the output from FinAnalytics, then add your branding plus other firm-specific content, such as partner profiles and contact information, to create this.

Meeting Agenda & Summary Template

Structure your advisory meetings with consistency:

- Pre-filled agenda with talking points to send to your client in advance
- Space for action items
- Summary email text to send clients after meetings (consider using AI notetakers such as Otter.AI, Read.AI, Fireflies.AI or Teams Copilot to automate this)

Refer examples at *Appendix D: Meeting Agendas* on page 44 below.

New Advisory Client Onboarding Checklist

Ensure no step is missed when setting up an advisory relationship. Includes:

- Data access & integrations
- Initial assessment
- Proposal sent & accepted
- Kick-off meeting booked

Refer example at *Appendix E: New Advisory Client Onboarding Checklist* 48 below.

CONVERSATION SCRIPTS & PROMPTS

Discovery Questions Cheat Sheet

Starter questions to uncover client pain points, such as:

- “What’s keeping you up at night financially?”
- “How are you measuring success in your business?”
- “If you could change one thing about your finances, what would it be?”

Refer example at *Appendix F: Discovery Questions for New Advisory Clients* on page 49 below.

Call Scripts, Email Starters and Newsletter Announcements

Sample language for:

- Introducing advisory services
- Following up after an advisory discovery meeting
- Upselling additional services

Refer examples at *Appendix G: Phone & Email Scripts* on page 51 below.

MARKETING COLLATERAL

Advisory Services Brochure Copy

Text you can adapt for your website, email campaigns or proposal documents, outlining:

- What’s included in your advisory services
- How it benefits you
- Different tiers available e.g. startup, growth, full-service
- Case study or testimonial (if available)

FinAnalytics Report Examples

Samples of anonymised reports with your branding showing:

- Plain English commentary about improvement suggestions, risks, and opportunities
- Performance analysis
- Industry benchmarking visuals
- Cash/dividend payment analysis
- Finance applications and/or valuations

TRAINING RESOURCES

Internal Training Deck

Editable slides to use in firm training sessions, covering:

- Why advisory services matter
- How to use FinAnalytics
- Advisory workflows & where FinAnalytics fits in
- Sales conversation framework

Onboarding Video Scripts [Optional]

For internal or client-facing videos explaining:

- How advisory services work
- What to expect during a Financial Health Review

- How to prepare for advisory meetings
- Example video of a client advisory meeting

BONUS TOOLS (OPTIONAL ADD-ONS)

- **Advisory Services Pricing Calculator (Excel)**
- **Client ROI Tracker**
- **Quarterly Advisory Progress Tracker**



10. Wrap-Up & Next Steps

You've now worked through a comprehensive framework for launching and growing a high-impact, scalable advisory practice.

Whether you're just getting started or ready to scale firm-wide, this section helps you consolidate your approach and move forward with confidence.

RECAP OF KEY STEPS

- 1. Understand the Shift**
Advisory services meet a growing market need and reposition your firm as a proactive, high-value partner.
- 2. Identify Opportunities**
Use client data and FinAnalytics to pinpoint where you can add value and provide tailored recommendations.
- 3. Design Your Offering**
Structure, package, and price your services clearly and consistently.
- 4. Sell with Confidence**
Leverage client insights and clear communication to position your services as must-haves, not nice-to-haves.
- 5. Deliver Efficiently**
Standardise your workflow, use the automation built into FinAnalytics, and your advisory work profitable.

6. **Scale Strategically**

Empower your team, systematise your approach, and track performance using KPIs.

7. **Measure & Refine**

Continuously improve using data, client feedback, and internal reviews.

NEXT STEPS FOR YOUR FIRM

Here's how to put this playbook into action:

Run an internal planning session

Pick 3 clients you'd like to trial an advisory engagement with. Use the templates to prepare and approach them.

Start small, deliver value, and build

Even one Financial Health Review per week can build confidence, generate results, and grow revenue.

Train your team

Share this playbook internally. Use the meeting agenda and training deck to upskill your team.

Track and celebrate wins

Every successful advisory engagement is a story worth sharing. Capture client feedback and use it to refine and grow your services.

YOUR ADVISORY PRACTICE, POWERED BY FINANALYTICS

FinAnalytics is designed to make this entire process faster, easier, and more impactful. With just a few clicks, you can:

- Upload client financials
- Generate a comprehensive report with commentary and benchmarks that you can use as the basis for an informed, in-depth, insightful conversation with your clients
- Identify actionable insights
- Engage clients in strategic conversations

It's the easiest way to transition your firm from reactive compliance to proactive advisory ... without hiring more staff or adding more hours to your week.

HIRE A BUSINESS COACH

If the process of getting started in advisory seems daunting, it could be a great opportunity to hire a business coach to support your journey.

They can help you to navigate the opportunity and ensure that you are maximising the return for both you and your clients.

We recommend meeting with a few different business coaches to see which suits you and your business best. Asking the business owners of your best clients who they use for their coach could be a great place to start.

It can be a fantastic way to help you transition to advisory services and take your business to the next level.

Appendix A: Client Advisory Opportunities Template

Client name	Financial red flags or opportunities	Suggested advisory service	Assigned team member	Contact status & follow-up date	Comments

Create a simple spreadsheet like this in Excel or setup a new opportunity type in your CRM.

Appendix B: Sample Advisory Services Website Text

Adapt the text below to suit your firm.

UNLOCK THE FINANCIAL POWER OF YOUR BUSINESS

Stop Guessing. Start Growing with [FirmName] Advisory Services

STILL RELYING ON YOUR P&L TO GUIDE BIG DECISIONS?

Most business owners don't realise how much money they're leaving on the table.

They're stuck:

- Chasing cash flow instead of controlling it
- Guessing instead of forecasting
- Paying for compliance, not advice

That ends now!

INTRODUCING: FINANCIAL CLARITY ADVISORY

Powered by AI + Our Expertise

We combine cutting-edge technology and decades of advisory experience to give you clarity, control, and confidence in your business decisions.

What You'll Get:

✓ AI-Powered Financial Health Report

Uncover blind spots, risks, and untapped potential in minutes.

✓ Industry Benchmarking

See how you compare to similar businesses and where you can outperform.

✓ Actionable Insights & Growth Plan

No jargon. Just clear recommendations with real dollar value.

✓ Quarterly Check-Ins with Your Advisor

We help you track results and stay accountable for implementation.

✓ Done-for-You Reporting Pack

Branded, easy-to-read reports to share with stakeholders, boards, or lenders.

BONUSES (INCLUDED FREE FOR A LIMITED TIME)

◆ Cash Flow Acceleration Pack (valued at \$X)

Tools, templates and proven strategies to reduce debtor days and smooth out your cash flow.

◆ Growth Levers Cheat Sheet (valued at \$X)

Customised for your business: 7+ growth tactics you can apply immediately.

◆ **XYZ Report/Guide (valued at \$X)**

A comprehensive report on [subject] that helps you achieve your business goals faster and easier.

◆ **Tax Minimisation Strategies (valued at \$X)**

Our one-page guide that ensures you claim every tax deduction you're legally entitled to. Don't pay more tax than you need to!

100% SATISFACTION GUARANTEE

Try your first report risk-free. If you don't find at least **3 valuable insights** that could improve your business performance, you won't pay a cent.

We believe in outcomes, not just outputs.

THE OFFER

Tier 1: Essentials – Financial Health Snapshot

Perfect for: Business owners who want a one-time check-up to identify risks and opportunities.

Features:

- Upload + analysis of 12–24 months of financial data
- Access to our AI-generated advisory report of business performance
- Industry benchmarking insights
- 30-minute strategy meeting
- Action checklist

💰 **Price:** \$X

📅 **One-time service**

Tier 2: Growth Partner – Quarterly Advisory

Perfect for: Clients ready to make financial performance an ongoing priority.

Features:

- Everything in **Essentials**, plus:
- Quarterly AI analysis + updated reports
- Quarterly 60-min advisory meetings
- Custom KPI dashboard
- Progress tracking & accountability support
- Email access for ad-hoc questions

💰 **Price Range:** \$X/month

📅 **12 month minimum commitment**


Tier 3: Virtual CFO – Premium Strategic Advisory

Perfect for: Fast-growing businesses needing proactive, data-driven financial leadership.

Features:

- Everything in **Growth Partner**, plus:
 - Monthly reporting & review meetings
-

- Scenario planning & what-if analysis
- Strategic forecasting & budgeting support
- Quarterly board-ready presentation pack
- Unlimited email + phone access for financial guidance
- Optional: team training or workshops

 **Price Range:** \$1,500–\$3,000/month

 **6-month minimum engagement recommended**

Optional Add-Ons (Across All Tiers):

- Tax planning session
 - Cash flow improvement implementation
 - Custom reporting build
 - Succession planning support
-

Is This for You?

This service is ideal for:

- Businesses earning \$500K–\$20M per year
 - Owners who want to grow, not just survive
 - Anyone who wants clarity before making big decisions
-

Ready to Make Smarter Business Decisions?

Click below to book your **no-pressure Discovery Call** and see what's possible with your numbers.

 **[Book My Discovery Call]**

Not Just Accountants. Strategic Growth Partners.

With FinAnalytics and our advisory expertise, we help you unlock more profit, reduce risk, and gain real financial clarity ... without the fluff.

Appendix C: Advisory Proposal Template

Prepared for: [Client Name]

Prepared by: [Your Name]

Date: [Insert Date]

Version: [Insert Version Number]

EXECUTIVE SUMMARY

This proposal outlines how [Your Firm Name] will assist [Client Name] in achieving improved business performance through targeted financial analysis and advisory support.

By leveraging data-driven insights and proven advisory frameworks, we aim to help you identify key performance opportunities, reduce inefficiencies, and strengthen long-term profitability.

Our engagement is designed to provide actionable recommendations, measurable outcomes, and ongoing support to ensure sustained business improvement.

INTRODUCTION

[Your Firm Name] specialises in financial modelling, analysis, and advisory solutions that empower business leaders to make informed, confident decisions.

Our experience working with clients across multiple industries allows us to identify growth opportunities, improve efficiency, and build financial resilience through data-driven strategies.

This proposal has been prepared in response to your interest in improving [specific area e.g. cash flow management, forecasting accuracy, or profitability] using our structured advisory methodology assisted by AI.

IDENTIFIED ISSUES

Based on our discussions and initial review of your financials, we have identified the following key issues or challenges:

- [Issue 1 – e.g. inconsistent cash flow or low liquidity]
- [Issue 2 – e.g. declining gross profit margins]
- [Issue 3 – e.g. limited visibility into future financial performance]

These issues present both risks and opportunities for improvement, which our proposed solution addresses directly.

PROPOSED SOLUTION

We recommend a structured advisory engagement that combines financial analysis, scenario modelling, and strategic guidance to address the issues identified above.

Our approach will include:

- Conducting a comprehensive AI-assisted financial health review
- Benchmarking your business performance against industry standards
- Identifying key drivers of financial performance
- Providing specific, actionable recommendations
- Delivering a clear implementation roadmap with measurable outcomes

This engagement can be delivered as a one-off analysis or as part of an ongoing advisory relationship with quarterly or monthly check-ins.

ASSUMPTIONS AND EXCEPTIONS

This proposal is based on the following assumptions:

- You will provide accurate and complete financial data within agreed timeframes.
- Access will be granted to relevant systems or files (e.g. accounting software, spreadsheets).
- Recommendations are based on information provided and market conditions at the time of engagement.

Exceptions:

- This engagement does not include tax, audit, or legal advice.
- Implementation of recommendations is at the client's discretion unless otherwise agreed.

OUTCOMES / BENEFITS / VALUE TO THE CLIENT

The key outcomes of this engagement include:

- Improved visibility into business performance and key financial drivers
- Enhanced decision-making through better forecasting and analysis
- Identification of cost-saving or profit-improvement opportunities
- Strengthened business resilience and planning confidence
- Access to AI-driven insights and benchmarking
- Increased firm valuation through sustainable financial improvement

REFERENCES / EXAMPLES OF PRIOR WORK

[Your Firm Name] has delivered similar projects for clients across various sectors, including:

- **Client A:** Increased operating profit by 12% through cost structure optimisation.
- **Client B:** Reduced debtor days by 35% via improved cash flow forecasting.
- **Client C:** Implemented forecasting and advisory workflows that improved client retention by 40%.

References or case studies can be provided upon request.

SCOPE OF SERVICES

Our advisory engagement will include:

1. **Data Collection & Analysis** – Reviewing financial data and performance metrics.
2. **Performance Analysis Report** – Analysis, benchmarking, advice and recommendations.
3. **Findings & Recommendations Workshop** – Discussion of insights and action plan.
4. **Implementation Support** – Optional support to implement recommendations.
5. **Follow-Up Review** – Tracking progress and measuring impact.

Deliverables:

- Financial Analysis Report
- Recommendations Summary
- Advisory Meeting & Action Plan

INVESTMENT, ROI & NEXT STEPS**Investment:**

- [Insert pricing structure: fixed fee, tiered package, or retainer option]

Estimated ROI:

Typical clients achieve returns of [X-Y]% through revenue growth, cost reduction, and/or efficiency improvements identified during the engagement.

NEXT STEPS:

1. Confirm acceptance of proposal.
2. Provide access to financial data and systems.
3. Schedule onboarding and project commencement.

We look forward to partnering with you to deliver actionable insights and measurable improvements to your business performance.

Appendix D: Meeting Agendas

FIRST ADVISORY MEETING

Client: [Client Name]

Date/Time: [Insert Date and Time]

Location: [In-Person / Zoom / Teams Link]

Prepared by: [Accountant's Name]

1. Welcome & Meeting Objectives (5 mins)

- Quick introductions and welcome
- Purpose of the meeting: to explore key financial insights and identify opportunities for improvement
- Set expectations for the session and outcomes

2. Business Snapshot & Recent Developments (10 mins)

- Ask the client: “What’s been happening in the business lately?”
- Discuss recent changes, challenges, or goals
- Align understanding of business context with data

Prompts:

- Is there anything you’d specifically like to know or discuss today?
- Have you seen any recent shifts in revenue or costs?
- Any plans to grow, hire, or restructure?
- What keeps you up at night financially?
- What changes have you seen in your industry recently?

3. Financial Overview Using FinAnalytics (15–20 mins)

- Present financial analysis prepared using FinAnalytics
- Highlight:
 - Red flags and strengths
 - Simplified financial report
 - Key ratios (profitability, liquidity, efficiency), ensuring you explain what these mean in plain English
 - Benchmark comparisons (vs. industry peers)
 - Other reports e.g. cash/dividend withdrawal analysis, valuation, financing etc

Tip: Use visual graphs and plain-English commentary to keep it clear and engaging.

4. Key Insights & Recommendations (10 mins)

- Present 2–3 actionable recommendations:
 - Operational improvements
 - Cost-saving opportunities
 - Growth strategies
- Explain the rationale behind each and the potential impact

5. Discussion & Client Priorities (10–15 mins)

- Invite feedback on recommendations
- Ask:
 - Which opportunities resonate most with you?
 - Are there other issues you'd like help addressing?
 - What would success look like 12 months from now?

6. Next Steps & Engagement Options (5–10 mins)

- Present options for follow-up or ongoing advisory services:
 - One-off improvement project
 - Quarterly advisory package
 - Virtual CFO service
- Discuss scope, pricing, and timing

7. Close & Follow-Up (5 mins)

- Summarise:
 - Key findings and agreed actions
 - Next steps (e.g. send proposal, book next meeting)
- Thank the client and confirm follow-up date
- Gain their permission to follow-up e.g. “Is it OK if I call you in 2 weeks time to check how you’re going with everything?”

✔ Post-Meeting Follow-Up

- Send:
 - One-page summary report or FinAnalytics output
 - Engagement proposal (if applicable)
 - Book follow-up call or meeting

FOLLOW-UP ADVISORY MEETING AGENDA

Client: [Client Name]

Date/Time: [Insert Date and Time]

Location: [Zoom / In-person / Teams]

Facilitator: [Accountant's Name]

1. Welcome & Purpose of the Meeting (5 mins)

- Welcome and rapport building
- Briefly revisit the goals of the initial engagement
- Explain that this session will review progress, reassess priorities, and explore new advisory opportunities

2. Review of Past Recommendations (10–15 mins)


- Recap of key insights and actions from the last meeting
- Discuss which recommendations were implemented and what the outcomes were
- Review any roadblocks or changes since the last meeting

Prompts:

- Is there anything you'd specifically like to know or discuss today?
- What changes have you made since our last session?
- Were there any wins or challenges following implementation?
- Did any new issues arise?

3. Updated Financial Review (15–20 mins)

- Present updated FinAnalytics reports using current data
- Focus on changes in:
 - Key ratios and metrics (e.g. profitability, cash flow, efficiency)
 - Benchmark comparisons
 - Improvements or areas still underperforming

 *Tip: Use charts or visuals to highlight trends over time.*

4. New Opportunities & Strategic Discussion (10–15 mins)

- Identify any emerging issues or new goals for the business
- Discuss possible new advisory needs:
 - Expansion plans
 - Staff or cost management
 - Pricing strategy
 - Succession or exit planning

Prompts:

- What's your top strategic priority this quarter?
- Are there any major business changes ahead?

5. Recommendations & Action Plan (10 mins)

- Present 2–3 new or revised recommendations
- Outline specific next steps for the client to take
- Discuss timeline and how your firm can support implementation

6. Review Ongoing Engagement (5–10 mins)

- Discuss value received from previous advisory work
- Present options for continued or upgraded engagement
 - e.g. Quarterly reviews, forecasting, strategic planning
- Confirm interest and next steps

7. Summary & Next Steps (5 mins)

- Summarise:
 - Key findings from this session
 - Agreed actions
 - Timeline and responsibilities
- Confirm date for next review or check-in
- Thank client and close the meeting

Follow-Up Deliverables

Post-meeting, send:

- Updated FinAnalytics report
- Summary of insights and recommendations
- Proposal or engagement letter for any additional services

Appendix E: New Advisory Client Onboarding Checklist

1. Data Access & Integrations

- Confirm client's accounting software (e.g. Xero, MYOB, QuickBooks, etc.)
- Request access credentials or API integration (via secure portal)
- Request recent financial reports:
 - Profit & Loss (last 12–24 months)
 - Balance Sheet
 - Cash Flow Statement (if available)
- Upload or connect financial data to FinAnalytics
- Collect qualitative business information:
 - Business model overview
 - Key revenue drivers
 - Known challenges or priorities
 - Recent changes
- Test integration and confirm data import is successful

2. Initial Assessment

- Run preliminary financial analysis using **FinAnalytics**. Select all relevant reports.
- Identify key financial risks, performance trends, and advisory opportunities
- Document 2–3 key insights or advisory focus areas
- Prepare preliminary client summary report (for internal review)

3. Proposal Sent & Accepted

- Ensure signed proposal has been received
- Create client and project in practice management system
- Add client to advisory services schedule
- Add client to marketing lists

4. Kick-Off Meeting Booked

- Schedule initial advisory meeting (in-person or virtual)
- Prepare meeting agenda:
 - Review of current financials
 - Discussion of key insights
 - Recommendations & advisory roadmap
 - Customise FinAnalytics output (add commentary, visuals, summary)
 - Confirm meeting time and send calendar invite
 - Send pre-meeting email with any prep instructions (optional)

Optional: Internal Readiness

- Assign client to lead accountant/advisor
- Log engagement details in CRM
- Notify team of new advisory client onboarding
- Add to Client Watchlist and/or Advisory Revenue Tracker

Appendix F: Discovery Questions for New Advisory Clients

1. Business Context & Vision

- Can you tell me about your business and how it started?
- What's your vision for the business over the next 1–3 years?
- Who are your key customers or target markets?
- What do you see as your main competitive advantage?
- What keeps you motivated in the business?

2. Current Challenges

- What are your biggest business challenges right now?
- What's preventing you from fixing these?
- How much are they costing you (or what's the impact of these on the business)?
- Are there areas where you feel uncertain or lacking visibility?
- Are you happy with your current profitability and cash flow?
- Is there anything that's causing stress or frustration financially?
- What would you like to improve but haven't had time to address?

3. Financial Goals & Performance

- What financial goals have you set for this year? Are you on track?
- Do you regularly review reports like P&L, Balance Sheet, or Cash Flow?
- Are you comfortable interpreting the financials, or do they feel overwhelming?
- How do you currently make financial decisions (e.g. budgeting, investments, hiring)?

4. Growth & Strategic Direction

- Are you planning to grow, expand, or invest in any new areas?
- Do you have any plans for funding, hiring, or equipment purchases?
- Are you considering succession, exit planning, or restructuring?
- What are your biggest opportunities over the next 12 months?

5. Existing Financial Processes & Tools

- What accounting software are you using? Are you happy with it?
- How do you currently track KPIs or measure business performance?
- Are you using forecasting, budgeting, or scenario planning tools?
- Do you feel like your current accountant/adviser provides proactive insights?

6. Decision-Making & Support

- Who else is involved in key business decisions?
- Do you have a business coach, CFO, or internal finance person?
- How confident do you feel when making financial decisions?

7. Desired Outcomes from Advisory

- What would you like from an advisory relationship?
- What does “great financial advice” look like to you?
- If we were to work together, what would success look like in 3-6 months?


Tips for Using These Questions

- Use these as a guide, not a script ... adapt based on the client’s personality and responses.
- Focus on *listening more than talking* during this phase.
- Take structured notes to help with proposal follow-up and personalisation.
- With the client’s permission, consider using an AI notetaker to make sure you don’t miss anything, then feed the transcript into a LLM with the following prompt:

We are an accounting firm with X partners and Y staff, operating in [location]. We are developing an advisory practice and recently met with a new client that provides [x y z] services/products. Using the discovery meeting transcript below, provide your suggestions on how we can help this client. Be specific with your suggestions. Meeting transcript: [transcript]

Appendix G: Phone & Email Scripts

PHONE CALL: INTRODUCING ADVISORY SERVICES

 **Goal:** Introduce the firm's new advisory services, create interest, and schedule a meeting or demo.

Opening / Greeting

"Hi [Client's First Name], it's [Your Name] from [Firm Name]. How are things going with you and the business?"

(pause for response and engage briefly)

"I wanted to give you a quick call because we've recently launched something new at our firm that I think could be really valuable for your business and I'd love to get your thoughts on it."

Transition to the Offer

"We've introduced a new advisory service that goes beyond tax and compliance. It's focused on helping business owners like you get better visibility into your numbers, make smarter decisions, and ultimately improve profitability and cash flow."

"We're using AI to confidentially and securely analyse your business data, benchmark it against your industry, and identify specific opportunities to improve. This allows us to provide you with a clear report that has plain English commentary and practical suggestions ... not just a pile of numbers."

Make It Relatable

"For example, we've helped some clients discover where they're leaking cash, where margins are too low, or how they can plan for growth more confidently. It's especially useful if you're looking to make decisions around hiring, pricing, or investing in the business."

Create Interest / Low Commitment Ask

"There's no commitment. We'd just like to show you what's possible using a sample report about your business, and then you can see if it's something that you'd find useful. Could we arrange a meeting to go through this with you?"

(pause and respond based on interest)

If Yes – Lock It In

"Great! How's your availability next week for a quick Zoom or face-to-face chat? I'll send you a calendar invite and we'll prepare a free sample using your latest financials."

If Unsure – Reassure

"No problem at all. Even just seeing the insights might spark ideas or help with decision-making down the track. I'll follow up with a quick summary email, and you can let me know if the timing works later on."

Close

"Thanks again [Client's Name], really appreciate your time, and looking forward to showing you what's possible."

EMAIL NEWSLETTER INTRODUCING ADVISORY SERVICES

Subject Line Ideas:

- "Exciting News: A New Way We're Helping You Grow Your Business"
- "Introducing Our New Business Advisory Services"
- "From Compliance to Confidence – Discover Our Newest Service"

Header:

 **Helping You Make Smarter Business Decisions – Not Just Meet Deadlines**

Body:

Hi [First Name],

At [Your Firm Name], we've always been committed to helping you stay compliant, up-to-date, and in control of your finances.

Now, we're going a step further.

We're excited to introduce our **new Business Advisory Services** that are designed to give you more than just numbers.

We provide **insights, strategy, and forward-looking advice** in plain English to help you:

- Understand what's really driving your profitability
- Benchmark your business against others in your industry
- Spot risks and opportunities before they appear on your P&L
- Plan for growth with confidence

These services are powered by our new AI-enhanced platform that confidentially and securely turns your financial data into clear, actionable insights: quickly, intelligently, and visually.

What You Can Expect

- ✓ A fresh Financial Health Review that helps you improve your business
- ✓ Clear recommendations you can act on
- ✓ Regular advisory check-ins (if you'd like ongoing support)
- ✓ The tools to get control of your business and become truly future-focused

Let's Chat

If you'd like a no-obligation chat to see how this might benefit your business, simply click below and choose a time that suits you:

 [Insert Booking Link or CTA Button: *Book a Discovery Call*]

We're looking forward to helping you build a stronger, smarter business!

EMAIL FOLLOW-UP AFTER DISCOVERY MEETING

Subject: Great to Connect – Here's What's Next

Hi [Client's First Name],

Thanks again for meeting with me earlier. I really enjoyed learning more about your business and the direction you're heading. I hope the conversation gave you some useful insights and clarity around how we could help support your growth.

As discussed, we identified a few areas where there may be opportunities to improve financial performance and decision-making, particularly around:

- [Insert brief summary of key opportunity #1]
- [Insert brief summary of key opportunity #2]
- [Optional: mention any red flags or risks uncovered]

I'll now put together a tailored proposal outlining how our advisory services (powered by our AI platform) could help you address these areas with practical, measurable outcomes.

What You Can Expect Next

- A short proposal document covering scope, timing, pricing, and expected benefits
- A sample report or dashboard based on your current numbers (where available)
- An option to schedule a follow-up meeting to walk through the plan together

Let me know if there's anything else you'd like us to consider in the meantime, or if you have any specific timing preferences for moving forward.

Looking forward to continuing the conversation!

Warm regards,
[Your Name]

Appendix H: Advisory Conversation Cheat Sheet

Here's a practical **internal cheat sheet** your accounting firm can use to help staff feel confident identifying advisory opportunities and handling client conversations.

ADVISORY CONVERSATIONS CHEAT SHEET

For Internal Use – Accounting Team

1. Common Advisory Triggers (What to Look For)

Trigger	What It Might Mean	Advisory Opportunity	Conversation Starter
Declining profit margins	Pricing issues, rising costs	Profit improvement review	“We’ve noticed your margins have dropped ... have you looked into what’s driving that?”
Cash flow stress	Poor timing of inflows/outflows	Cash flow forecasting	“Would it help to map out your cash flow over the next few months?”
Rapid growth	Scaling risks, capacity pressure	Scenario planning	“Growth is great ... have you modelled what this means for your cash and resources?”
High debtor days	Slow collections	Working capital improvement	“There may be an opportunity to free up cash by tightening debtor processes.”
Large tax bill surprises	Lack of forward planning	Tax planning + forecasting	“We can help you avoid surprises like this going forward.”
Client asking frequent questions	Underlying uncertainty	Ongoing advisory support	“It sounds like you’d benefit from more regular financial guidance.”
Business owner uncertainty	Lack of clarity or confidence	Financial health review	“Would it help to get a clearer picture of how your business is really performing?”
Significant change (hiring, expansion)	Strategic inflection point	Planning & modelling	“Before you make that move, we can model the financial impact.”

2. Common Client Objections & How to Respond

Objection	What They Really Mean	Suggested Response
“I can’t afford it”	Unsure of value	“That’s fair ... most clients find the insights identify opportunities worth many times the cost. We can start small if you prefer.”
“I already get reports”	Don’t see difference	“Absolutely ... this builds on that by translating your numbers into clear actions and opportunities.”
“I don’t have time”	Overwhelmed	“That’s exactly why we do this ... we do the heavy lifting and present only what matters.”
“I’ll think about it”	Needs more clarity or urgency	“No problem ... was there anything in particular that you’d like me to clarify?”
“Things are going fine”	Not aware of hidden risks	“That’s great ... this is often most valuable when things are going well, so we can optimise and stay ahead.”
“I’ll just wait until year-end”	Reactive mindset	“We often find the biggest wins come from acting earlier ... would it be helpful to look at a quick snapshot now?”

3. Simple Advisory Conversation Flow

Use this structure to guide discussions:

Step 1: Start with Insight (Not a Sales Pitch)

“We’ve been reviewing your numbers and a few things stood out...”

Step 2: Highlight Opportunity or Risk

“There may be an opportunity here to improve [profit/cash flow/etc.]...”

Step 3: Ask a Question

“Is that something you’ve been thinking about or looking into?”

Step 4: Offer Help (Low Pressure)

“We can run a quick analysis to explore this further if you’d like.”

4. Go-To Phrases (Easy Wins)

These help make conversations feel natural:

- “Would it be helpful if we...”
- “What we’re seeing in your numbers is...”
- “One thing that stands out is...”
- “We often see businesses like yours benefit from...”
- “There’s a potential opportunity here to...”

5. Confidence Reminders for Your Team

- You are **not selling** ... you are helping clients make better decisions
- Clients already **trust you** ... this is a natural extension of your role
- You don’t need all the answers ... just **start the conversation**
- Use **FinAnalytics insights** as your foundation ... let the data lead

6. Quick Daily Habit

Each time you review a client file, ask:

👉 “Is there one insight here that could help this client make a better decision?”

If yes ... start the conversation.