

# Covid to Advisory

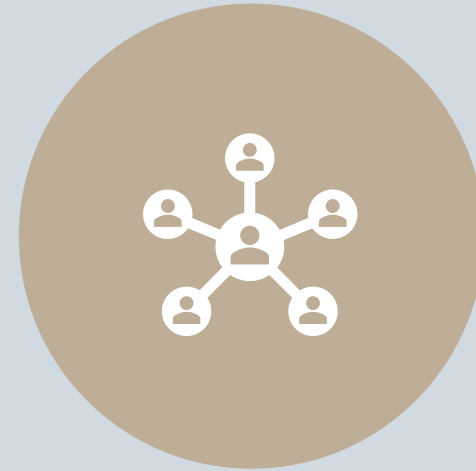
HOW TO BUILD ON THE LAST 2 YEARS TO GO BEYOND COMPLIANCE

# About this discussion

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WHY ARE WE **STILL** TALKING  
ABOUT THE SHIFT INTO  
ADVISORY?



WHAT'S THE COVID  
CONNECTION?

# Conversations during 2020/2021

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1. Jobkeeper, cash boost, and grants
2. Business continuity
3. Emerging from COVID - the new normal

# What is advisory work?

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- Cashflow management
- Forecasting
- Financial analysis
- Financial software and technology
- Investment decisions
- Strategic planning
- Acquisition
- Succession planning
- Risk management

# DISCUSS

What are the benefits of providing advisory services to clients?

*Consider the benefits for your firm and your clients*





CONSIDER HOW YOU'VE  
HELPED CLIENTS IN THE  
LAST 2 YEARS



IDENTIFY ISSUES THAT  
CLIENTS FACE



IDENTIFY ADVISORY  
SERVICES YOU COULD  
PROVIDE



DECIDE WHERE TO  
START



TALK TO SOME CLIENTS

# Five steps to increase advisory billings

# How have you helped clients in the last 2 years?

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What issues have your clients dealt with because of the Covid pandemic?



Over the last 2 years what advisory work have you done for clients?



# Identify issues your clients will face

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*The only way to make a sale is when  
you're able to help solve a client's  
problem.*





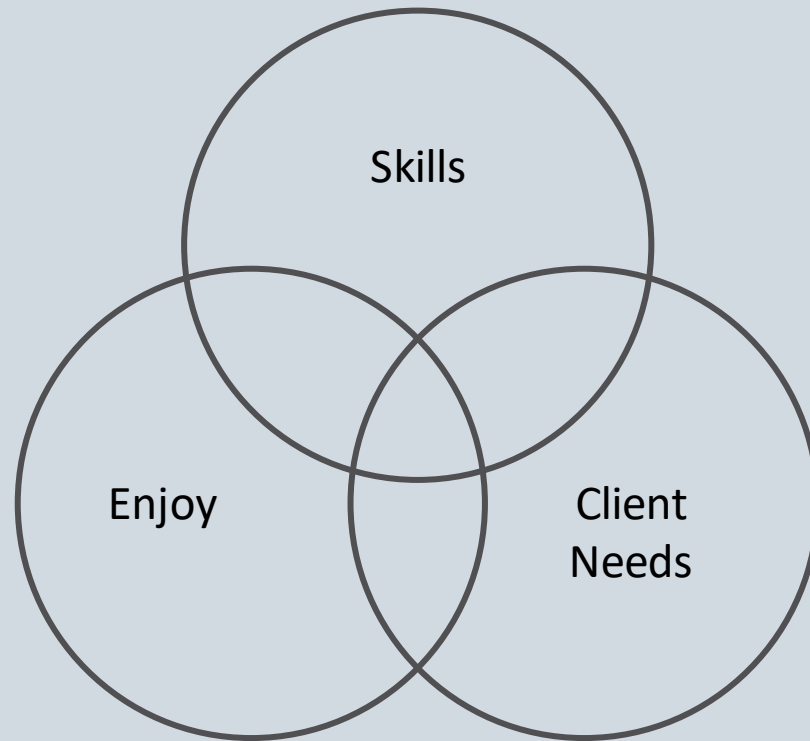
# Which advisory services are relevant?

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- Cashflow management
- Forecasting
- Financial analysis
- Financial software and technology
- Investment decisions
- Strategic planning
- Acquisition
- Succession planning
- Risk management
- Other?

# Decide where to start

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# Talk to some clients

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- Have something to talk about
- Ask them about their goals and concerns
- Listen for areas you might be able to help
- Follow up with an email
- Continue to let them know about your new services

# Top 3 Tips

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1. Don't try to do it all. Choose one or two advisory areas to focus on.
2. Focus on client needs. Be aware of the issues your clients will face over the next 2 years
3. When you call clients, be interested not interesting. Your initial call is to discover, not to sell something!

Thank You