

**FUTURE FORWARD SEPTEMBER 2023**


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Advisory, Analytics, and AI



# Advisory Isn't A Four-Letter Word: Part Two, Defining And Delivering Your Services.

Kellie Parks, CPB



Today is about actional steps to define what your “advisory” services can be.

*Starting with simple to implement ones and how to deliver them in a scalable way.*



Advisory is not all about making your clients need you.

*Advisory is about empowering them with knowledge and information to appreciate you.*



Advisory is not telling your clients stuff.

*Advisory is about listening to your clients,  
engaging with them on their wins and woes  
and discovering how to help them.*

# Agenda



- How to define your advisory services
- Examples of simple to-implement advisory services
- Scalable processes for the delivery of advisory services



**I'm Kellie Parks, CPB**

Founder, Calmwaters Cloud Accounting

I want every accounting professional to love running a cloud based firm as much as I do, so I sell cloud accounting templates to take the pain out of creating processes and systems.

*Proud member of the Intuit International Trainer Writer Network and the LeaderBean of The Financial Cents Ambassador Programs.*



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Future Forward 2023

Previously  THOUGHT LEADER CREATIVE.





Great advisory starts with great  
financials.





# Defining your advisory services.


- 
- What do you love to do?
  - What do you do well?
  - What are your clients asking for more help with?



Do you have a niche or common set of problems among your clients that you can help alleviate?




Simple to-implement advisory services.


- 
- Create report groups that they can access anytime, anywhere
  - Create reports they can understand
  - Create custom reports that relate to their business



And reports they don't even know they need!




Keep an ongoing, collaborative document that covers what their year looks like.



Scaling processes for the delivery of advisory services.



- 
- Become an educator
  - Partner up
  - Create a FAQ library
  - Create process and systems that you can implement for SMBs

# Summary



- Define your advisory services
- Implement simple advisory services
- Create scalable (non-CAS) processes for the delivery of advisory services



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To value you.

To pay you more.

# Questions?





Thank you for joining me :-}