

THE BENEFITS OF CLIENT ADVISORY SERVICES

The accounting industry is seeing a shift from compliance-based, transactional services to more proactive, value-added advisory services. These types of services, which can include anything from cash flow forecasting and budgeting to technology implementation and process change, can stand to benefit your clients as well as your firm.

Providing advisory services offers a chance for year-round touch points with your clients and the opportunity to bill on a value platform rather than hourly. Advisory services are also a way to build trust and strong relationships with your clients which has proven vital for client retention.

Advisory services offer benefits to the client as well. By outsourcing services an internal accountant or CFO would handle, many small business owners save time and money on these necessary tasks. They also receive an outside evaluation of their business from an impartial expert who can help improve cash flow, operational processes and aid in implementing change. The infographic to the right provides additional benefits of client advisory services.

For Your Firm



Provide valuable guidance and support to clients



Effectively meet client needs and expectations to strengthen client relationships



Provide a year-round revenue stream, driving firm growth



Ability to hire employees with diverse specialties and expertise on different subject matter

For Your Clients



Outsourced CAS services save time and money



Evaluation of business operations can improve efficiency and productivity organization-wide

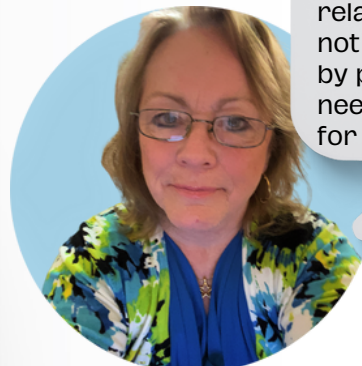


Proactive planning can prevent crisis situations



Improved financial and cash flow management, better forecasting and smart financial strategizing

Business owners are looking for guidance on different aspects of their companies. Partnering with their accountant or advisor builds on an existing relationship. It's a perfect way to not only help serve your clients by providing what they want and need, but to help drive revenue for your firm.



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