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# The session

## EXPLORING ADVISORY SERVICES WITHIN YOUR FIRM

Marnie Stretch

@marniestretch

# The speaker



**Marnie Stretch, CPB**

**Accounting Loft**

# CPD Credits

## In order to receive CPD credits,

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

# Agenda

- What are advisory services?
- Why provide these services?
- How can I get started?
- How do I price it?
- What apps can help me with this?
- Questions

# A TALE OF TWO SISTERS

Marnie & Tamra  
1969





## 70's TYPING CLASS

I don't remember any boys  
in my class....



## EXEC-U-MAIL

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- 7. Set Up/Customize
- 8. Use Tutorials
- 9. Register QuickBooks
- E. Exit

# QUICKBOOKS The Early Days

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F1-Help

← Sele

A TALE OF TWO  
SISTERS

Marnie & Tamra  
2013





What are advisory services?





SINCE 1828

JOIN MWU | GAMES | BROWSE THESAURUS | WORD OF

advisory

DICTIONARY

THESAURUS

# advisory adjective

ad·vi·so·ry | \ əd-'vīz-rē , -'vī-zə-\

## Definition of *advisory* (Entry 1 of 2)

- 1 : having or exercising power to advise  
*// an advisory council*
- 2 : containing or giving advice

# A VERY SHORT LIST

Recommendations

Ratios

KPIs

Cash Flow

Reports and Review

Financial Analysis

Business Coaching

Technology Advisory

Analyze/Analysis

Education

Financial Literacy

Projections

Business Process Transformation

Automation

Budgeting

Industry specific file architecture

App integrations

Financial coaching

Customized workflows

Pricing Strategies

Financial management consulting

Profit First



Any service where the Human Element can be reintroduced, reinvented or reprioritized in a meaningful way. Less about a specific output & more about personalizing the process to provide growth/empowerment opportunities.

- *Chata.ai*

Why provide these services?





Remain  
Relevant



Prepare for  
Retirement



Increase your  
Pricing



Change  
Lives

How can I get started?



1. Get clients on QBO

2. Set up workflow

3. Real-time books





Try Zoom!



Clients should not be gaining insights from you without a price being attached to that value.

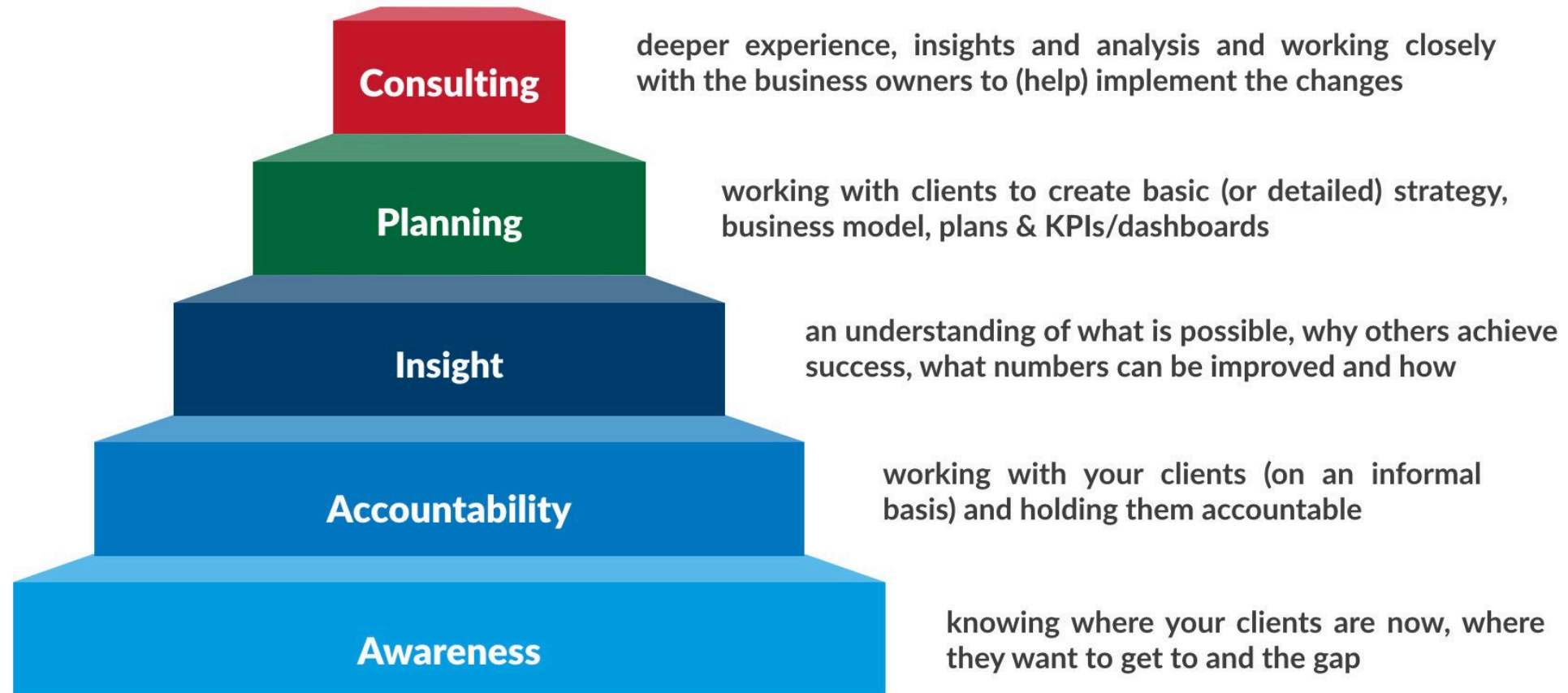
- *Jason Blumer*

# Insight Moments....

1. Have a beginning and end time, and are on a particular date
2. Are sold beforehand
3. Have a name
4. Are performed in human to human situations
5. May review and noticed patterns about business results
6. Force the realization of value
7. Take place with empathy and care

Source: <https://www.firmofthefuture.com/content/7-insight-moments-to-sell-advisory-services/>

# the five levels of advisory



Source: Aynsley Damery, CEO & Founder of Clarity-HQ

How do I price it?





What apps can help me with this?





**Fathom**



YOUR PRACTICE

Clients

Team

ProAdvisor

Work

Pro Tax NEW

Apps

YOUR BOOKS

Dashboard

Banking

Sales

Expenses

Employees

Reports

Benefits Training

Schedule support calls for a time that's best for you



Enhance your knowledge

Getting Started with QuickBooks Online Accountant webinar



Training and certification



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Software and services

QuickBooks Online for your firm



Payroll for your firm





CHATA.AI



The challenge in getting to next generation advisory is understanding the true value to (our) clients is a process of empowerment that enables financial literacy, insights generation, and allows firms to stand out from others by creating an elevated level of client experience and loyalty.

This places more importance on the relationship advisors have with their clients than the data they keep.

*- Kelly Cherniwchan, Chata.ai*

**REVIEW** your list of  
services. What will  
you offer to  
differentiate?

**OFFER to do a Profit  
& Loss and Balance  
Sheet review with one  
of your customers.**

**CHOOSE one of the  
apps to test drive.**



## Key Learnings

- You first need to get clients on QBO and their data up to date
- You may already be providing several advisory services!
- Take your *Chopsticks* and turn it into *Chopin*! Invest in ONE app.

Please complete the session survey online:

[www.surveymonkey.com/r/firmservice](https://www.surveymonkey.com/r/firmservice)

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# Questions?

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