

**Consultants Training to Deliver**

**Business Advisory Services**

Hello, I’m Peter Towers, Managing Director of ESS BIZTOOLS and ESS BASIP. Welcome to Accountants Minute.

Consultants’ training to deliver business advisory services is very important if you’re going to meet the challenge of being able to deliver outstanding new products and services for your clients ‘beyond taxation’.

There is an old saying – *‘There is no gain without pain’*. This is very true when it comes to examining how you’re going to go about delivering business advisory services.

The subject that I want to talk to you about today is the training material that is available within the ESS BIZTOOLS’ Gold Package to assist you to prepare your team to be able to deliver a vast range of very interesting corporate and commercial products that your clients want you to produce for them.

To start the ‘journey beyond taxation’, our recommendation is that firstly you appoint a facilitator for this process. This could be a partner, a manager or an external consultant. The team that is going to be involved in the delivery of business advisory services; your accountants; your marketing people (if you have them) would then meet once a week for three months for 1-2 hours to work their way through the training material to prepare them for this challenge of performing, what is often called, ‘chief financial officer services’.

Where do we start? The first couple of modules are basic introduction; the team training introduction to your team as to what business advisory services is all about. They then move into leadership, because understanding leadership principles is very important for your accounting team as they undertake this wider range of professional responsibilities.

Part of this process will be the identification of industry “champions”. Those accountants within your team who are going to know a bit more about a particular industry that is one of the key industries of your clients.

Product “champions” are also very important. Who is your debtors’ “champion”? Your business plan “champion”? Your succession plan “champion”? The person within your team who understands the capital raising opportunities that are now available for small/medium businesses?

The training would then move on to an appreciation of the SME Needs’ Analysis. This is a vital document because it identifies, for your client, the type of services that you’re able to provide, ‘beyond taxation’.

Marketing tactics are very important because many of your clients will not have an appreciation that your accountancy business is able to deliver a wider range of services. This might be because, for the last ten years, that client has only talked to you about taxation and they might think that is all you can do.

Professional selling skills are also very important and we have a module on professional selling skills to assist you in this unfamiliar area.... for most accountants, ‘professional selling’.

The training material has a presentation seminar whereby we suggest that the industry “champions” make presentations at a series of small seminars (no more than 10 client businesses at a time) whereby your ‘champions’ can give an overview of the type of services with which they’re now very familiar.

We then have training material on the one-on-one consultation because this is very important. This is where the ‘rubber meets the road’; where the accountant can talk to the client about the type of services that your firm is able to provide, obtain a commitment from the client, proceed with the proposal and quotation and then, the all-important, request for the order so you can proceed with the work.

This whole process is all about developing confidence in your accounting team members to be able to confidently talk to your clients about ‘matters beyond taxation’. They are then able to deliver a wider range of services, which are also part of the training program:

* Chief Financial Officer services
* Personal Property Securities Register Due Diligence
* Debtors’ Management
* Business Plans
* Director’s Duties and Corporate Governance, as it applies to a small/medium enterprise
* Succession Planning
* Capital Raising for small businesses – we’re in this exciting era of now being able to use Early Stage Innovation Companies and Crowd-Sourced Funding Companies (from 29th September 2017)

Within ESS BIZTOOLS we have a series of material, in Mentoring & Coaching, which will assist you to educate your clients on the types of services that you’re now able to provide. Your team members will need to go through that training process.

* Starting a Business
* An Intermediary Training Program
* Advanced Management Training
* Exporting
* Dealing with Banks
* Identifying Government Grants

All this training material is delivered with training notes, webinars, videos and mentoring sessions to help your team become very familiar and very confident in their ability to ‘talk the talk’ to your clients so they can deliver this wider range of services.

Whilst there is no ‘gain without pain’, the gain will be very appreciated by your clients, by your team members (who will be doing new and exciting work) and I’m sure also, by your firm.

We have a **25% discount** available to you as part of our New Financial Year celebrations. This special promotion expires on the **31st August 2017**. Please go to our website – [www.essbiztools.com.au](http://www.essbiztools.com.au) and click on “[Subscriptions](http://www.essbiztools.com.au/index.php?option=com_content&view=article&id=43&Itemid=53)” to subscribe to take advantage of this special 12 months, 24/7 subscription per office of only **$2,227.50** (incl GST).

We have a special webinar on **Monday 14th August 2017** at 12.30pm titled “Consultants Courses Within ESS BIZTOOLS”. ([Click here](https://register.gotowebinar.com/register/5797499797597328130)) to register for this free webinar. Please put it into your diaries now and I look forward to speaking with you more at that time.

If you have any questions or comments on any aspect of how you might go about using ESS BIZTOOLS’ Gold Package to assist you to deliver outstanding value-adding services to your clients, please don’t hesitate to contact us.

Have a great day.

Peter Towers

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