

Transform
Seize Opportunity
Grow Perfect





SPOTLIGHT

REPORTING

APP PARTNER
OF THE YEAR





**Compliance
doesn't
change lives.
Our work
does.**



Seizing Opportunity

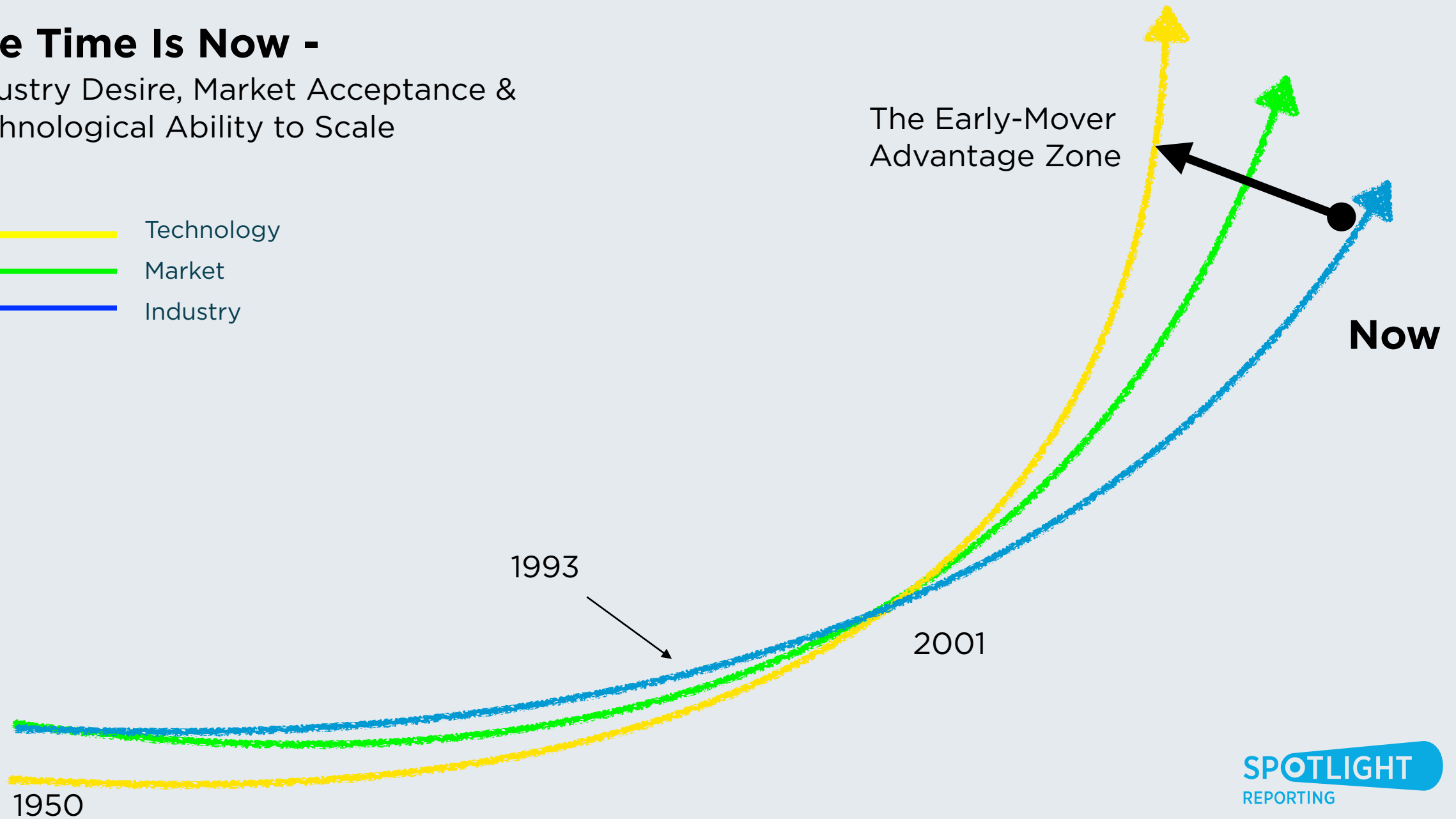
The Time Is Now
You're the Roadblock
Start Tomorrow

May you live in interesting times...

The transformation that is taking place offers **fantastic opportunities** for new entrants to the industry and for those prepared to reinvent themselves. It also promises slow and steady decline for those unwilling or unable to adapt.

The Time Is Now -

Industry Desire, Market Acceptance &
Technological Ability to Scale



The Time Is Now!

The technology of today provides
the perfect environment for
scalable, cost-effective value-add.

But...

The Time Is Now!

Advisory Services in the Cloud require a very
human commitment
to investment in time, money and effort,
to fresh thinking, discipline and
an unwavering perseverance...

#ban_excuses

Don't be this dick!



I'm too busy

My team don't get this

What, I have to spend money!!??

It's hard

My clients don't get this

It's too soon

Tax season!

Compliance is our priority for now



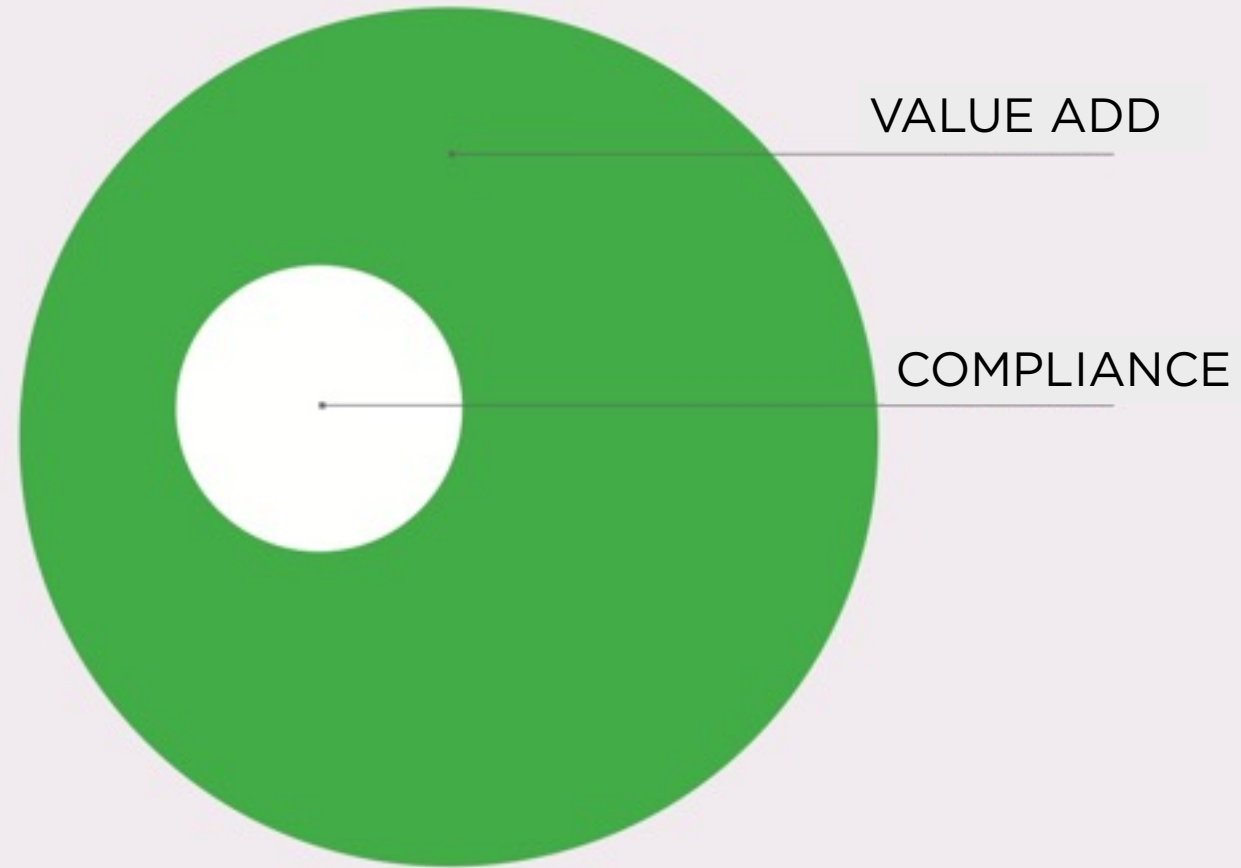


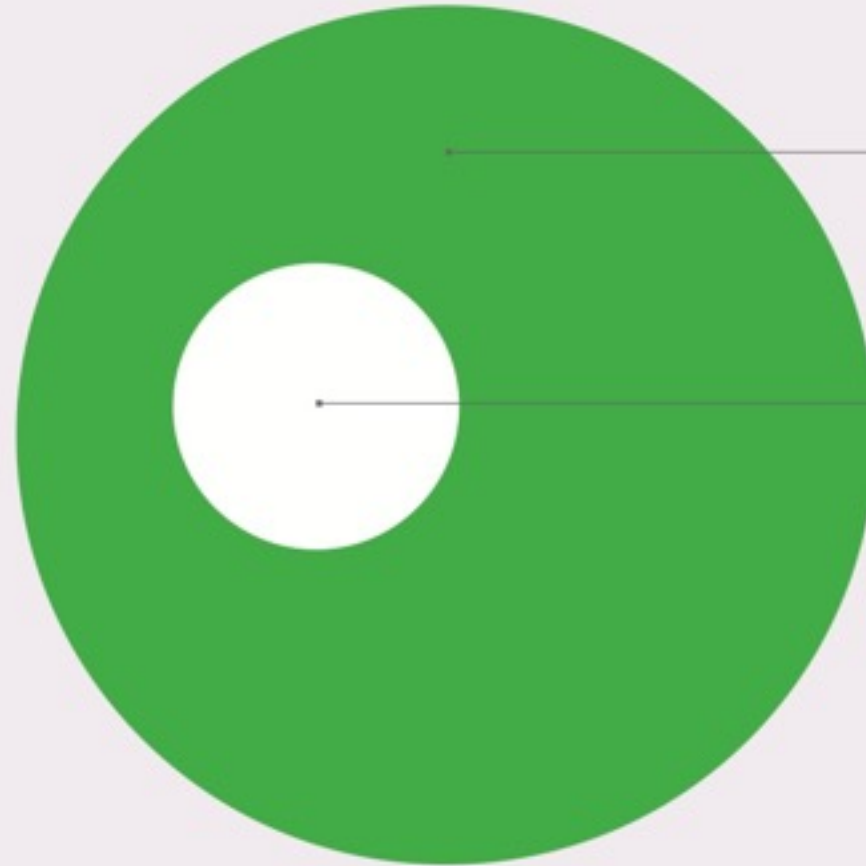
Plan Your Race
Train Smart
Focus Energies
Run Hard & Fast
Generate Impact

- Small organisation can have a disproportionate impact
- Shape, momentum and trajectory determine the ripple you create



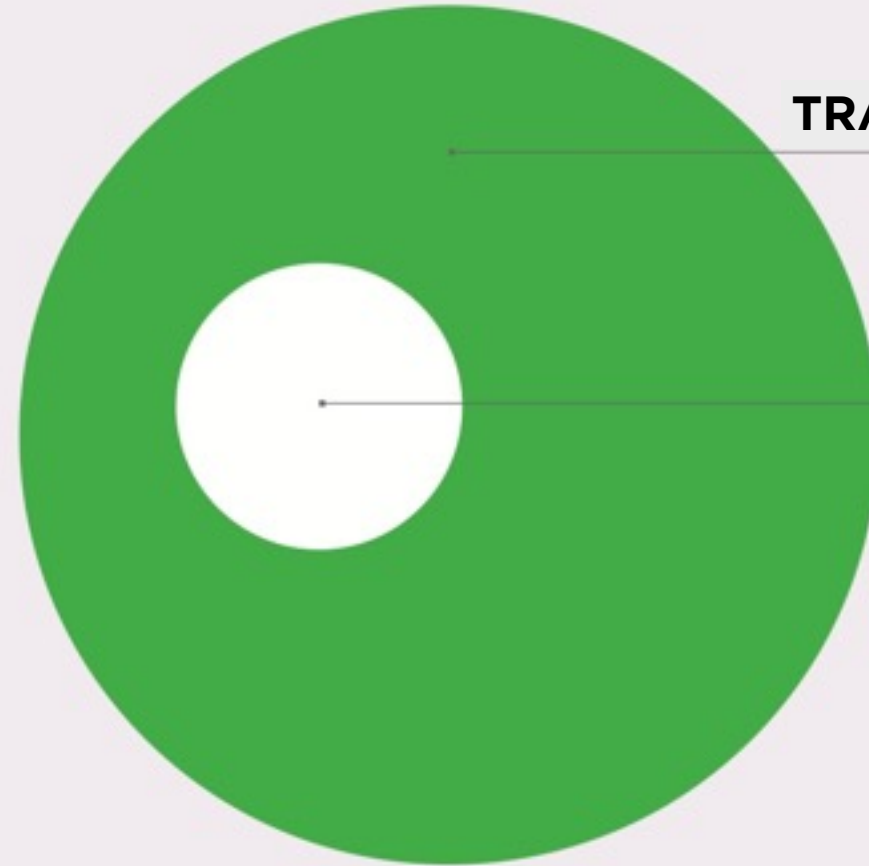
Grow Perfect





DREAMS

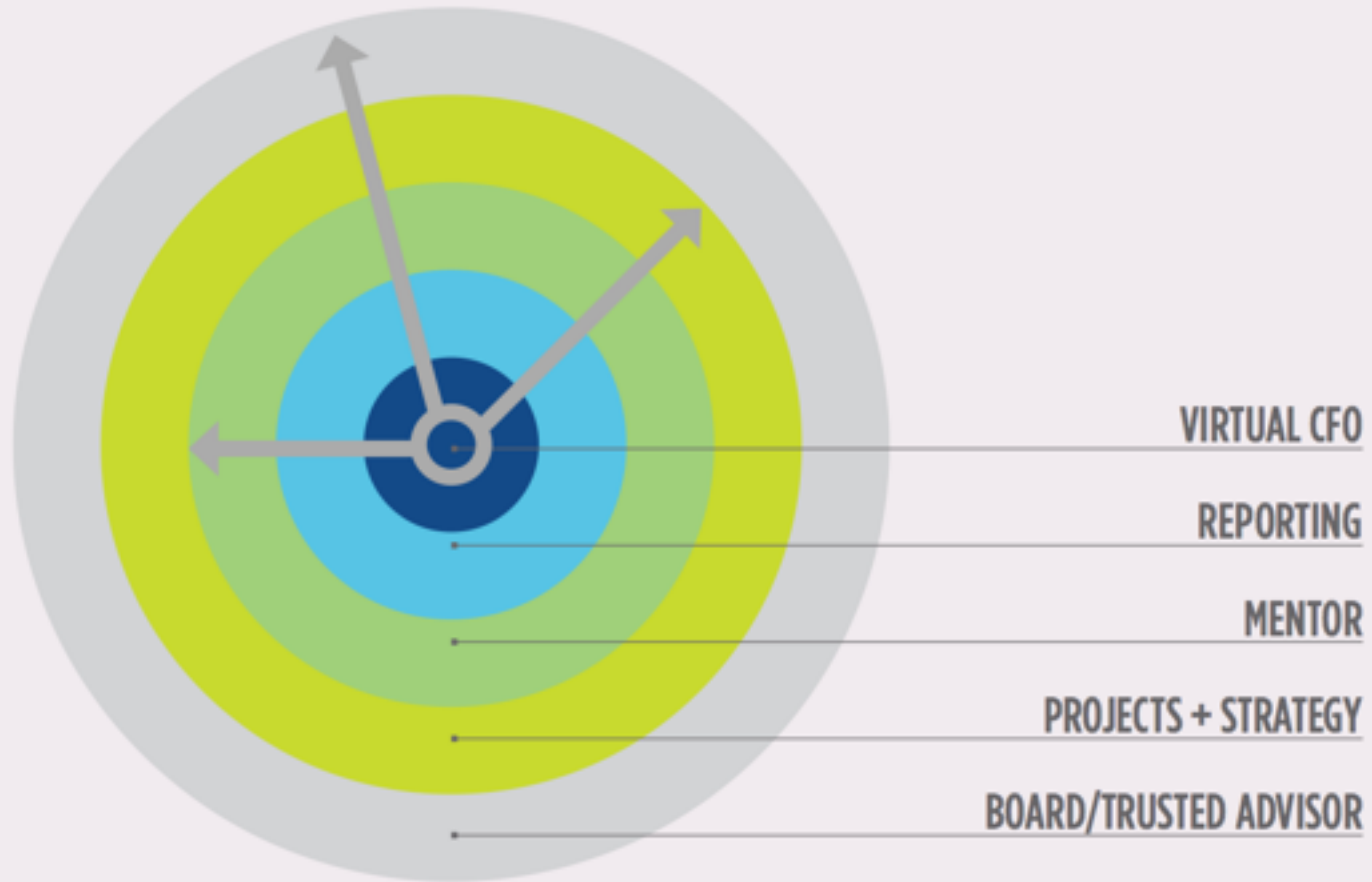
YAWNS



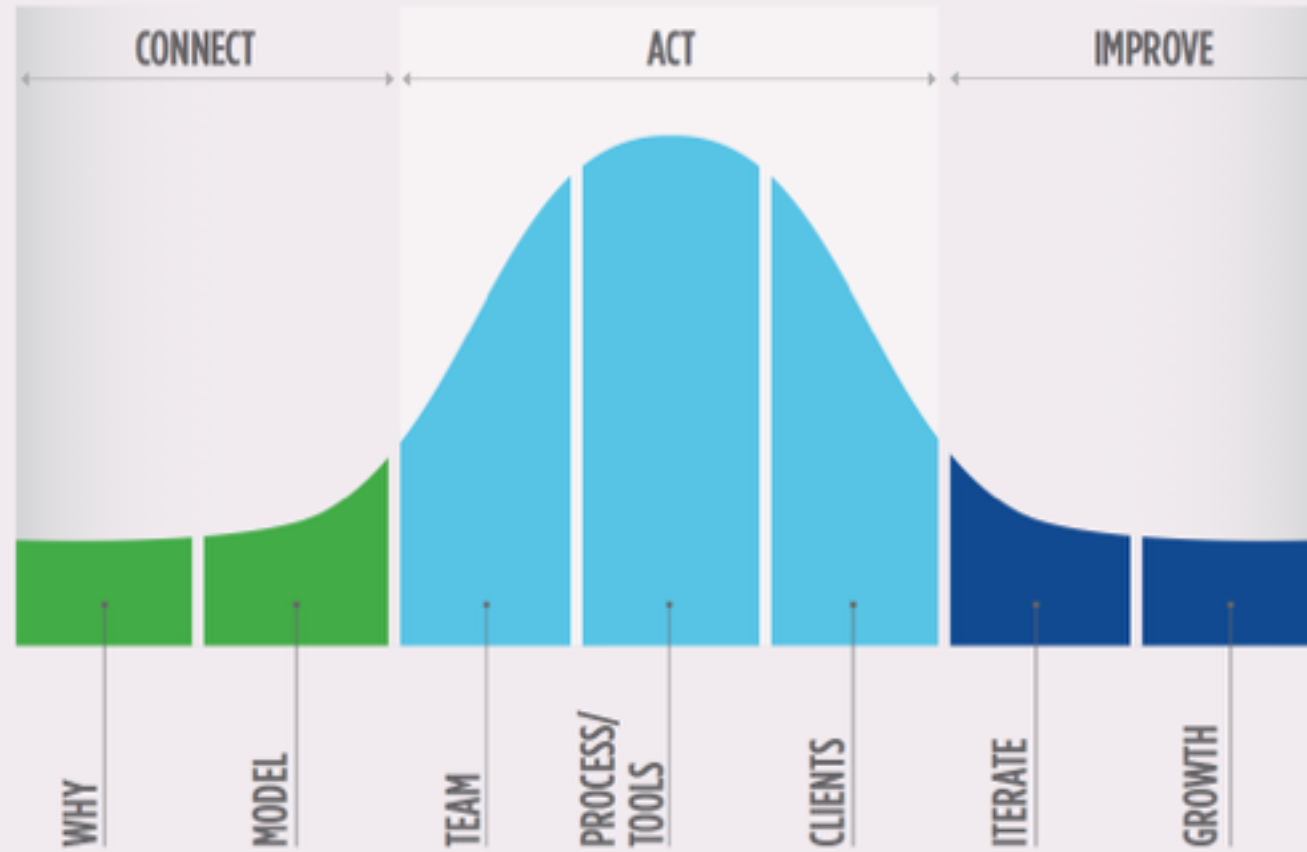
TRANSFORMATION

STATUS QUO

Perfect Advisory Services



VALUE-ADD CURVE



Grow Perfect - 7 Tips

1. **Select well** - have an up-front acceptance and resignation process
2. **Super clear** - you are “different” as a service-provider
3. **No boundaries** - business, financial and personal are on-topic
4. **Compelling** services - a menu or bundled package, upsold
5. Set the **cadence** - you will interact on cycle X using process Y
6. **Shock and awe** - do more, be available and deliver delight
7. **Grow trust** - aim for that heady mix of high ARPU and client NPS!

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REPORTING

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DASHBOARD

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FORECASTING

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MULTI





Transform your firm, your outcomes

Transform client outcomes,
change lives!

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REPORTING

Thank You!

Slides shared via Dropbox

