



## Complimentary Client Review - Outline

### Why we developed this service.

It's extremely important to work **on** your business, not just **in** it. Taking time out to discuss what's happening in your business is essential to give you clarity about your future and vision to enable us to support you in the most appropriate ways.

A Complimentary Client Review is an ideal opportunity to meet us on a complimentary, obligation free basis to discuss any of the following:

- Your goals for your business and how you plan to achieve them
- How your business goals tie in with your personal and lifestyle goals
- Issues and challenges you're facing in your business e.g. growth, profitability, cashflow, succession, etc.
- How you can work with us to address these

### Who should have a review?

If you want to improve your business performance and financial results, and minimise any risk in your investments, schedule a Complimentary Client Review. We're not just advisors on your rear-facing tax matters - we want to help you achieve your future business goals.

We'll review and discuss your current situation at no cost. It's an opportunity for us to check in with you that we are giving you all the assistance that you need. For example, we might be able to help you with some strategies to help you grow and protect your assets or improve your efficiency and effectiveness.

### What is involved?

You'll meet with a senior team member for a 60 minute session, reviewing your current situation and discussing how we can support you to resolve your burning issues. We will send you a copy of the Meeting Minutes documenting your business and lifestyle goals and all agreed actions.

If required, we will also prepare a proposal for you including upfront prices of our services for any additional support work that we identify during the meeting.

### When should I get a review?

We want to stay in touch regularly to ensure your business and personal goals are being met. We have set aside time for this meeting to happen after your financial statements have been completed. Of course, you don't have to wait until then; you can contact us any time to set up a catch up.



## Benefits of a Complimentary Client Review

- Clearly discuss and document your business and lifestyle goals
- Gain clarity of the actions you need to take to achieve your goals
- Stimulate strategic discussion around the current and future direction of your business and investments
- Identify your burning issues, opportunities, and challenges so you can set actions to respond effectively
- Gain a better understanding of your business
- Access the collective wisdom of our firm
- Assess the current structure of your business
- Potentially identify greater tax efficiencies
- Gain a better understanding of the ways we can support you

**Call us now on +64 21 2644673 to book your Complimentary Client Review**

## Business Planning - Outline

### Why we developed this service.

Success is about planning; we want to help you achieve success.

- Do you have a current Business Plan?
- Have you set realistic and measurable goals?
- Do you have clear strategies to achieve your goals?
- Do you regularly review your goals in regard to changing circumstances?

A Business Planning session will require you to take time out from day-to-day activities in the business to focus on the business. Together we will review your past performance and clarify future direction. You will set solid and realistic business goals and define strategies for achievement. At the end of the session, you will have a one page Business Plan which will act as a guide map to ensure you are on course for success.

### Who should have a Business Planning session?

Every business should have a Business Plan. Would you like:

- To increase the level of growth, profitability and cashflow in your business?
- Support to unlock your business potential?
- A clear outline of what you need to do to unlock this potential?
- A document against which to measure your progress?

### What is involved?

You attend a four-hour planning session facilitated by Advisory Plus. Together, we will:

- Discuss and set personal and business goals for the next 12 months
- Discuss and agree on an action plan with strategies to support achievement of goals
- Identify Gross Revenue Targets and Key Performance Indicators
- Identify opportunities and vulnerabilities in your business that need to be managed
- Establish a 90 Day Action Plan to address immediate critical issues

We'll provide you with pre-work, which you will need to complete prior to the Business Planning session to ensure you identify any issues that need to be discussed. That way we can prepare any information required prior to the session.

### When should I have a session?

Any time is a good time to develop a Business Plan if you don't have one, however it is particularly relevant at the start of a new financial year. If you are contemplating a major change in an existing business or starting a new venture, a Business Plan is crucial. You'll require a Business Plan to support any financial applications.

## Benefits of a Business Planning session

- Review and set the direction of the business
- Eliminate procrastination
- Identify common goals amongst a number of directors (if applicable)
- Identify and prioritise your key goals
- Create strategies to achieve your goals
- Identify what you will need to achieve your goals
- Set timeframes for achieving your goals
- Develop a tool to communicate your business goals and vision with your team
- Divide your goals into short term and long term - quick wins vs. key projects
- Develop a template to review actual performance against targets
- Create a platform to develop Financial Forecasts
- Use your Business Plan as a basis for you to set team members' individual goals / targets

**Call us now on +64 21 2644673 to discuss the preparation of your Business Plan**

## Financial Awareness Coaching - Outline

### Why we developed this service.

The better you understand your business, the easier it will be to make more money. Management decisions rely on a sound understanding of the financial implications for a business. We have developed this service to enable business owners to fully understand and interpret their numbers, so they have a strong foundation on which to grow their business.

### Who should attend?

We recommend this service to you if you are passionate about your business and want to better understand your numbers, so you can answer questions like:

- How much profit have I made this year?
- Why has my profit increased but I have no cash?
- Is my cash level increasing or decreasing?
- What is affecting my cash level?

### What is involved?

You will attend meetings with us every two months to discuss your financial results. The focus of each meeting will change and progress depending on your needs and objectives. You will:

- Develop an understanding of your key financial reports
- Gain knowledge of key accounting concepts
- Learn how to report on cashflow and profit
- Begin to produce your own customised reports on a monthly basis
- Understand how to better manage your debtors and creditors
- Learn how to monitor income and expenses throughout the year
- Find ways to save time on admin tasks that could be automated
- Identify weaknesses / areas to work on between meetings to get better results
- Iron out any existing errors (formats, coding, analysis, timing differences, etc.)
- Understand what other information you should capture monthly and how (e.g. stock, debtors, creditors, etc.)

### When should I begin Financial Awareness Coaching?

Any time is a good time to start understanding your financial reports in order to improve business performance. The sooner you start Financial Awareness Coaching, the better your understanding of financial results and their implications, and the more control you will have over outcomes.

## Benefits of Financial Awareness Coaching

- Enables you to better understand your business
- Iron out any existing errors to ensure accuracy in your financial reports
- Better manage and monitor your cashflow
- Customise your reports to ensure you capture the right information
- Format your reports in a way that makes decision making easier
- Gain better understanding of the financial implications of decisions
- Make better informed decisions
- Access regular independent financial advice
- Review your reports and record actions to be achieved before the next meeting
- Be held accountable to achieve progress between meetings
- Identify any burning issues that need to be addressed
- Access the collective wisdom of our accountants, systems, products, and services
- Phone support to address any burning issues between meetings

**Call us now on +64 21 2644673 to further discuss  
Financial Awareness Coaching**

## Quarterly Coaching - Outline

### Why we developed this service.

- At times as a business owner do you feel alone and unsupported?
- Do you struggle to make time to work on your business rather than in your business?
- Are you keen to find new strategies to improve performance and overcome business challenges?
- Would you like an independent coach to discuss your burning issues and opportunities with?

We appreciate that owning your own business is hard work; the purpose of Quarterly Coaching is to provide you with accountability and support to keep you on target towards achieving the goals you have set in your Business Plan. We will ensure your Business Plan remains a living, working document, and a filter through which all decisions are made.

### Who should attend?

If you're passionate about your business performance and want to achieve your goals, then we recommend this service to you. Quarterly Coaching gives you dedicated time to make better business decisions, using the best information and with support from your coach. We will hold you accountable for your actions and ensure that you reach your targets.

### What is involved?

This coaching programme consists of quarterly meetings with one of our senior team members, as well as phone and email support. The purpose of each meeting is to review your actual results, clarify areas where you can improve your business performance, set 90 day goals and identify strategies to achieve them.

As a result of each meeting, you will develop a realistic 90 Day Action Plan with timelines to keep you on track to achieve your annual Business Plan. You will have access to our expertise and resources to enable you to implement best business practice.

### When should I get begin Quarterly Coaching?

Ideally, Quarterly Coaching takes place once you have completed a Business Plan, so it becomes the guide against which all operational and personal decisions are made. However, the Quarterly Coaching programme may also be used as a vehicle and guide to work through major changes in your business circumstances or to help you implement a Strategic or Succession Plan.

## Benefits of Quarterly Coaching

- Accountability and support from your coach to enable you to achieve your desired results
- Increase profitability and cashflow
- Determine a process to report your actual results against your budget
- Gain an understanding of the key drivers within your business and what impacts them
- Identify and solve your burning issues
- Gain access to an expert sounding board to thoroughly discuss your ideas
- Understand the impact of ideas prior to implementing them within the business
- Improve leadership
- Improve business performance by identifying ways to overcome challenging issues
- Keep your Business Plan as a 'living document' to ensure you are working towards your goals
- Align the Directors in terms of prioritising what projects are important (if applicable)
- Access the collective wisdom of our accountants, our systems, products, and services

**Call us now on +64 21 2644673 to further discuss our Quarterly Coaching service**

## Organisational Review - Outline

### Why we developed this service.

- As a business owner do you find you are wearing too many hats?
- Do you have clearly defined departments and functions within your organisation?
- Does every employee have clarity about their role and responsibilities?
- Do you have job descriptions for every role in your organisation?

In order for a business to run effectively and efficiently there needs to be a clear Organisation Chart which visually defines departments, functions, roles, and responsibilities. Not only for the current structure, but also for one that is scalable for future growth.

We offer this service to assist you to construct your own Organisation Chart, giving you clarity of the key functions within your business and who has responsibility for them. An updated Organisation Chart will allow your business to be more sustainable, scalable and, ultimately, saleable.

### Who should use this service?

If the number of tasks you're trying to complete leaves you feeling overstretched, or you have employees who could be supporting you more, then we recommend this service. It's an opportunity for you to define who should be doing what to improve efficiency and give you more time to concentrate on your key activities.

### What is involved?

The Organisational Review process will take a full day; we can, however, meet with you over two half-day sessions if you'd prefer. During the review, we will:

- Discuss the five fundamentals to develop an Organisation Chart
- Discuss the four key principles you must adhere to when developing or modifying your Organisation Chart
- Review our structured process for creating an Organisation Chart
- Utilise our Organisation Chart template
- Recommend the next steps to take to develop your first draft

Over the following weeks, you will then submit your final draft for us to review, and we'll discuss our recommendations in order to finalise your organisational structure.

### When should I have a session?

If no clear job roles and position responsibilities exist within your organisation, then we advise that you begin this project as soon as possible. If you are planning for expansion this will help to clarify roles and responsibilities required for a sustainable, scalable, and saleable organisation.

## Benefits of an Organisational Review

- Increase your ability to make effective strategic decisions
- Understand the key functions within your business and who should be responsible for them
- Clearly define the internal structure of your business
- Determine ideal roles for the business as opposed to fitting roles to the people in your team
- We will act as a sounding board for you to discuss your ideas
- Gain access to our collective wisdom; our systems, products, and services
- Develop a business structure that you understand
- Increase efficiency and productivity in your business model
- Develop a structure that will support the future plans for your business
- Clarity for your team around their roles, responsibilities, and career development opportunities
- Increase team engagement and satisfaction by clarifying expectations
- Gain clarity on what functions can be outsourced
- Allow your business to be more sustainable, scalable, and ultimately, saleable
- Free up time for you to concentrate on revenue generating activities

**Call us now on *+64 21 2644673* to further discuss our Organisational Review service**

## Proactive Accounting Meeting - Outline

### Why we developed this service.

It's important to spend time working **on** your business, not just **in** it. Taking time out to discuss what's happening in your business will provide clarity of your future direction. A Proactive Accounting Meeting gives you the opportunity to meet with us on a no charge, no obligation basis to discuss the following:

- Your goals for your business and how you plan to achieve them
- How your business goals tie in with your personal and lifestyle goals
- Issues and challenges you are facing in your business e.g. growth, cashflow, succession, etc.
- How you can work with us to address these

It's also a great opportunity for us to share how we can assist you in the future. For example, would you like to know more about our strategies to help you grow your wealth, profitability and cashflow? Would you like help improving your efficiency and effectiveness?

### Who should have a meeting?

If you're keen to improve your business performance and financial results and feel like you are not currently being supported to achieve this, then contact us. We firmly believe that we can help you and, more importantly, we want to!

### What is involved?

You'll have a complimentary consultation with a senior team member to review your unique situation and discuss how we can support you in the most appropriate way. Following the meeting, if required, we will prepare a proposal for services with all costs priced upfront.

### When should I have this meeting?

We recommend that you arrange your Proactive Accounting Meeting with us as soon as possible in order to identify immediate strategies to improve your financial position.

*Why put off until tomorrow what you can achieve today!*

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## Benefits of a Proactive Accounting Meeting

- Review and establish your goals and strategies for achievement
- Identify your burning issues and opportunities
- Assess your current business structure
- Stimulate strategic discussion of the current and future direction of your entities
- Identify how we can assist you to achieve your goals through the growth and protection of your assets
- Gain access to our collective wisdom and advice for your unique situation
- Identify the key drivers of your business
- Potentially identify greater tax efficiencies
- Gain a better understanding of your business
- Understand our service offerings and how they can benefit you
- Gain certainty about our fees, with upfront pricing for proposed work

**Call us now on +64 21 2644673 to book your Proactive Accounting Meeting**

## Cashflow Management - Outline

### Why we developed this service.

Cashflow planning is best practice in any business and critical to survival and growth. Setting cashflow targets and regularly monitoring your actual cashflow against your forecast will enable you to predict large cash outflows and respond to changes in your business.

Inadequate cashflow is a symptom of management problems in a business, NOT the cause. Helping our clients look ahead with confidence and putting in place basic cashflow maximisation strategies is core to our purpose as your accountants.

### Who should get a review?

If you require a Cashflow Forecast because your bank manager has requested one, we can create one for you. However, this Cashflow Management service is fundamental as every business owner needs an understanding of cash and liquidity for better decision making. Recognising the difference between profit and cash, and the impact improving your Cash Conversion Cycle will have on your business is essential to managing and growing any business.

### What is involved?

There are two service options. Both include the completion of a Cashflow Forecast and the inputting of your Cashflow Forecast into your accounting or reporting software.

**Service one: A Cashflow Forecast.** Preparation of a Cashflow Forecast and a one hour Cashflow Forecast Review to discuss and finalise the Forecast.

**Service two: Cashflow Management Coaching.** Preparation of a Cashflow Forecast along with a three hour Cashflow Management Coaching session to:

- Discuss and finalise the Cashflow Forecast
- Identify your current Cash Conversion Cycle
- Identify the likely causes of cashflow problems within your business
- Set 12 month and 90 day cashflow improvement goals and actions

This initial session is followed by four quarterly accountability coaching sessions ensuring you put in place essential cashflow management strategies and achieve your cashflow improvement goals.

### When should I get a review?

Businesses should have a Cashflow Forecast in place before the beginning of the new financial year. Having said that, we can provide this service at any time.

The sooner we complete a Cashflow Forecast for you, the sooner we can work together to agree strategies for improvement.

## Benefits of Cashflow Management

- Assists with bank lending requirements
- Identifies ways to avoid late payment penalties and interest from suppliers
- Improves communication and relationships with your financiers and suppliers
- Gives you an understanding of cash and liquidity for better decision making
- Helps you understand the key cashflow drivers and the Cash Conversion Cycle in your business
- Enables you to predict and plan for large cash outflows
- Teaches you how to monitor your actual cashflow against forecast in your accounting or reporting software
- Provides peace of mind that your cashflow needs are known and properly funded
- Improves business processes that maximise cashflow, profit and business value
- Drives your business to achieve your goals in a controlled and managed way

**Call us now on +64 21 2644673 to discuss our Cashflow Management service options**

## KPI Improvement Coaching - Outline

### Why we developed this service.

The better you understand your business, the easier it will be to increase your profits and free up cashflow. We've developed this service to enable business owners to work out what the key drivers are in their business (we call these Key Performance Indicators, or KPIs). We want you to learn how to measure them accurately, then apply strategies and tactics to improve each KPI.

### Who should use this service?

Any business owner who wants to better understand how to drive increased profit, cashflow and ultimately, business value, will benefit from this service.

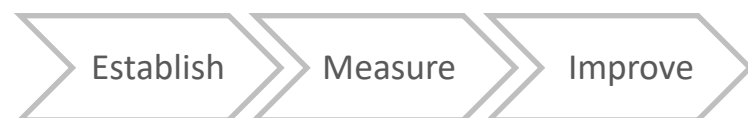
### What is involved?

First, we work together to establish the key drivers in your business. These may be financial (e.g. gross profit margin or average annual customer spend), or non-financial (e.g. customer satisfaction ratings).

Then we teach you how to measure each KPI and track them via a cloud-based performance dashboard. We like to limit the number of KPIs you're monitoring to the most important ones (the ones that will make the most powerful difference to your business).

Once you're confident measuring each key driver accurately, we'll work with you on a monthly basis to form a tactical plan that includes all of the business processes and behavioural changes needed to improve your results. It's remarkable how simple changes to your business processes can improve your key drivers. What you measure you can manage.

### The KPI Improvement Process



### When should I sign up for this service?

Any time is the right time to start working on your business's KPIs. It's easy to make excuses such as 'I'm too busy working **in** the business right now to devote any time to working **on** this stuff'. The reality is, however, that if you allocate a little time each week to improving your business performance, the time investment will make a big difference to both your business and personal life.

## Benefits of KPI Improvement Coaching

- Establish 3-5 key drivers that are fundamental to your business's success
- Set sensible targets for improving those KPIs
- Streamline / establish the business processes that will improve your KPIs
- Increased efficiency and productivity
- Access to a cloud-based dashboard
- An easy to interpret snapshot of your business performance
- We'll encourage you to be accountable for your goal achievement
- Be inspired to work less **in** the business and more **on** it
- Gain access to our collective wisdom, systems, products, and services
- Gain a better understanding of your business
- Increase your ability to make effective strategic decisions

**Call us now on +64 21 2644673 to discuss our KPI Improvement Coaching service**



## Monthly Coaching - Outline

### Why we developed this service.

- At times as a business owner do you feel alone and unsupported?
- Do you find it difficult to make time to work **on** your business rather than **in** the business?
- Are you keen to find new strategies to improve performance and overcome business challenges?
- Would like an independent coach to discuss your burning issues and opportunities with?

We appreciate that owning your own business is hard work; the purpose of Monthly Coaching is to provide you with accountability and support with planning and decision making to ensure progress. We'll help you overcome roadblocks and challenges in your business, working in synergy to utilise our combined expertise.

### Who should attend?

If you're passionate about your business performance and want to achieve your goals, then we recommend this service to you. Monthly Coaching allows you to dedicate time to making better business decisions with the support and knowledge of your coach. We will hold you accountable for your actions to ensure that you feel supported and enabled to reach your targets.

### What is involved?

This coaching programme consists of monthly meetings with a senior team member as well as phone and email support. The purpose of each meeting is to review your actual results and clarify areas where you can improve your business performance and overcome obstacles.

As a result of each meeting, you will receive minutes and an updated action list to keep you on track to achieve your goals. You'll have access to our expertise and resources to enable you to implement best business practice.

### When should I begin Monthly Coaching?

Ideally, Monthly Coaching takes place once you have completed a Business Plan, so it becomes the guide against which all operational and personal decisions are made. However, the Monthly Coaching programme may also be used as a vehicle and guide to work through major changes in your business circumstances or to help you implement a Strategic or Succession Plan.

## Benefits of Monthly Coaching

- Accountability and support from your coach to enable you to achieve your desired results
- Increase profitability and cashflow
- Determine a process to report your actual results against your budget
- Gain an understanding of the key drivers of your business and what impacts them
- Identify and solve your burning issues
- Gain access to an expert sounding board to thoroughly discuss your ideas
- Understand the impact of ideas prior to implementing them within the business
- Improve leadership
- Improve business performance by identifying ways to overcome challenging issues
- Align the directors in terms of prioritising what projects are important (if applicable)
- Access the collective wisdom of our accountants, our systems, products, and services

**Call us now on +64 21 2644673 to find out more about our Monthly Coaching programme**

## 7 Ways to Grow Your Business - Outline

### Why we developed this service.

We want to help you gain clarity on how to better lead and manage your business. This 90-minute seminar covers the seven most powerful ways to improve your business profitability.

It will help you identify ways to maximise business efficiency, improve profit and cashflow to help you get more from your business - whether that's more time, more money, or more mind freedom.

Business owners should adopt a new mindset to succeed in the changing business landscape. Change is not easy, but a little planning, combined with action and accountability will pay off.

### Who should attend a 7 Ways to Grow Your Business seminar?

- Not on track to achieve your financial results this year?
- Want to increase your profit and improve cashflow?
- Want to improve margins?
- Looking for business growth?

Take time out from working *in* your business to look *at* your business in a new light. Develop a clear roadmap for your business so that you achieve your business and personal goals.

### What is involved?

This 90 minute Seven Ways to Grow Your Business seminar covers the seven key areas in your business that you can influence as well as strategies you can adopt to achieve growth and improvement.

You'll be challenged to change your behaviour and look at your business like you never have before. You should leave feeling energised and ready to start making powerful changes.

### When should I attend a seminar?

We regularly hold 7 Ways to Grow Your Business seminars, get in touch to register your interest for the next seminar or keep an eye out for marketing.

## Benefits of attending a 7 Ways to Grow Your Business event

- Learn how to develop a roadmap for your business
- Define your business's dashboard
- Discover how to measure and maximise business efficiency
- Understand the seven ways to grow your business
- Learn how to adapt the seven ways to grow for your business to improve your profit and cashflow
- See a worked example of how small changes can have a substantial effect on your profits
- Look closely at your business and adapt to succeed in the changing landscape
- Grow your profit and business value significantly
- Discover the top four actions you need to take to ensure your business delivers what you want in life

**Call us now on +64 21 2644673 to find out about our next 7 Ways to Grow Your Business seminar**

