DATA

Facts and figures provided about business

INSIGHTS

Analysis of business or industry data

PROBLEM SOLVING

Guidance and advice relating to a specific issues or opportunities

STRATEGY

Developing strategies for major issues or opportunities identified

IMPLEMENT

Facilitation for the successful implementation of strategies

VALUE TO CUSTOMER

- Reconciliation of balance sheet account balances
- · Financial reports
- Variance analysis

- Executive Summary
- Performance dashboards
- Management conference call
- Financial budgets
- Issue Ranking Diagnostic
- Time Management Diagnostic
- One Page Accountability Plan
- Product Benefit Analysis
- Peer to Peer Learning
- Monthly implementation support
- Project team formation

BOOKEEPER

- Clerical
- Process driven
- · Technology platforms

ACCOUNTANT

- Inquisitive about business
- · Moderate business acumen
- Confident in conversations

ACCOUNTANT

- · Controls a meeting effectively
- Possesses problem solving skills

ADVISOR

- Good facilitation skills
- Open to change
- Self-starter

ADVISOR

- Address complex issues
- Unconsciously competent with broad range of skills

CAPABILITY REQUIRED TO DELIVER

- · Initial data assessment
- · QuickBooks online
- · Bill.com
- · Receipt Bank

- Business reviews
- IBIS World industry report
- Best practices

- Now-Where-How
- Leadership team meetings
- Decision metrics

- Strategic planning workshops
- Mind mapping
- Force field analysis

- Change management process
- Peer to peer learning
 One page plans

Technology | Research & Resources | Coaching | Training | Products

PERFORMANCE IMPACT