REVITALIZE

your client accounting and advisory services with guidance from CPA.com

PROFESSIONAL SERVICES

1 Learn
2 Build
3 Expedite
4 Master
5 Evolve
BUILD your BPO business model with our
CLIENT ADVISORY SERVICES WORKSHOP

Advanced cloud technology has transformed client accounting services. Integrated cloud applications support a highly efficient digital workflow that enable firms to access up-to-the-minute data and provide higher-value advisory services that support clients’ long-term financial success.

In THIS WORKSHOP, you will learn how to:

1. Develop a strategic plan to effectively guide you through the transition of building your own cloud-based client accounting services practice.

2. Manage client service delivery with best practices for the client engagement process, including client assessment, services design, implementation, and more.

3. Select and enter vertical markets and succeed within them, such as non-profit, professional services, restaurant, and others.

4. Build the right pricing model by using effective tools and resources to help you accurately determine fees and value price your services.

5. Learn proper scoping techniques for your engagements through comprehensive engagement letter and service level agreement construction.

6. Find and recruit top talent to manage your outsourced accounting services.

7. Develop a marketing and sales plan to ensure you continue to build your clientele.


Our proven and tested education program, combined with our collaborative consultative approach, moves progressive firms forward in their transition to higher-level advisory services and cloud-based technology. And our team of experienced professionals is dedicated to your success—working in partnership with you and your staff at each step of your transformation.

CPA.COM PROFESSIONAL SERVICES

Professional Services delivers a comprehensive portfolio of offerings including training, consulting, and change management support to enable your firm to take advantage of today’s lucrative outsourced business services—including virtual controller and CFO services.

Our Roadmap for Profitability Moving Your Client Accounting Services Practice to the Cloud workshop provides introductory instruction to get you started on building a profitable, high-performance outsourced accounting and advisory practice. Our workshops provide a step-by-step roadmap with the key components required to achieve success in this area. This two-day comprehensive training is offered in different cities across the country and is also available through online sessions. Both options offer the opportunity to engage in group exercises and discussion. Attendees will also receive access to a plethora of customizable tools to build your service.
EXPEDITE buy-in from staff and partners with our ON-SITE CONSULTING

Often, getting complete buy-in from partners and staff can be a challenge—hindering a firm’s transition to the cloud and the ability to implement outsourced accounting and advisory services. Our on-site consulting is designed to educate your entire team on the value of collaborative cloud-based services and address your firm’s unique challenges.

On-site consulting represents a comprehensive education option to provide partners and staff with custom, on-premise strategic coaching. Our team offers profound insight into current and proven process strategies to successfully assist you in building a collaborative client accounting services practice and elevating profits.

Experience the MANY BENEFITS including:

• Leveraging firm-centric content and facilitating change-management action plans.
• Simultaneously introducing your entire leadership team to the value of operating a cloud-based firm, expediting partner buy-in.
• Offering personalized training for all staff, so that everyone is on the same page.
• Educating on key business model components such as pricing, niche specialization, engagement agreements, staffing, sales, marketing, and more.

The details on CPA.com’s UNIQUE APPROACH:

• One-hour web-based "pre-analysis session" to build out a customized agenda and audience groupings based on your firm's unique consulting needs.
• Eight-hours-per-day, on-premise delivery and facilitation sessions (which typically run two days). Virtual sessions are also available.
• Expert training facilitated by a CPA.com consultant and thought leader practitioner.
• Optional post-site web accountability reviews.

MASTER the art of planning with our advanced workshop: MASTERING DIGITAL CLIENT ADVISORY SERVICES: Business Planning & Value Pricing

With our mastery-level workshop, you will advance to a whole new level of knowledge. Developed for practitioners who are well down the transition pathway, you will receive in-depth instruction on highly focused business growth areas.

This one-day, online workshop was designed as a successor event to our Roadmap for Profitability Moving Your Client Accounting Services to the Cloud workshop. Receive guided instruction on building your collaborative client advisory services practice.

Agenda for BUSINESS PLANNING session:

• Business planning for digital client advisory services
• Components of an effective business plan
• Business model review
• Focused vertical niche considerations
• Deep-dive facilitated business plan construction

Agenda for VALUE PRICING session:

• Value in the eyes of clients
• Strategies to develop the right price point
• What it means to bundle services and how to master it
• How to track and keep your costs in line
• Strategies for scaling up service over time
EVOLVE to meet the needs of today’s clients

With CPA.com’s comprehensive learning options, you have a dedicated partner to lead you down a proven, guided path to build a progressive and lucrative outsourced accounting and advisory services practice.

Be sure to view our full roster of resources today!

WHAT CLIENTS ARE SAYING...

“The best thing about the workshop was that I came away thinking: we can do this! The facilitators showed us how it can be done through real-life examples, including explaining potential obstacles and how to overcome them.”

— Barbara Ostrander, CPA
Vanacore, DeBenedictus, DiGiovanni & Weddell LLP

“We really liked how flexible the CPA.com team was in meeting our firm’s unique needs in building a strategic outsourced client accounting services practice. We were able to ask the facilitator real-world questions that he experienced first-hand.”

— Ken Coelho, CPA &
Mark Pribble, CPA
RBZ LLP

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