

STEPS ALONG THE PATH TOWARDS

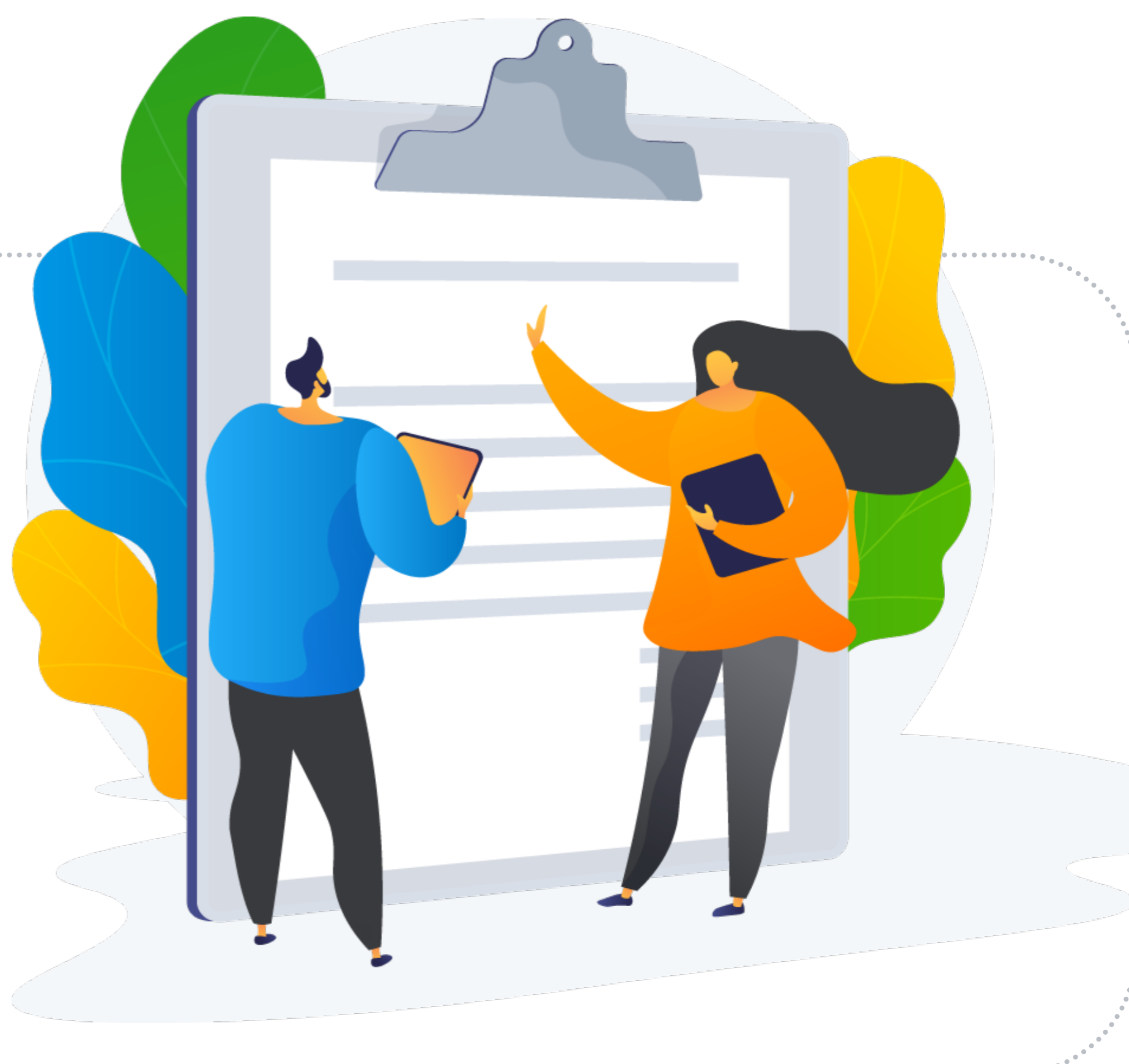
# Leading with Advisory Services

Many tax and accounting professionals are looking to:

- improve their work/life balance
- have a more significant impact on their clients' financial well-being
- streamline their practices using innovative technology

As a result, we are seeing a shift in the tax profession from leading with compliance services to leading with advisory services. If you are considering moving in this direction, following are some of the steps along the path recommended by our Intuit Tax Council members.

[Download the full guide here.](#)

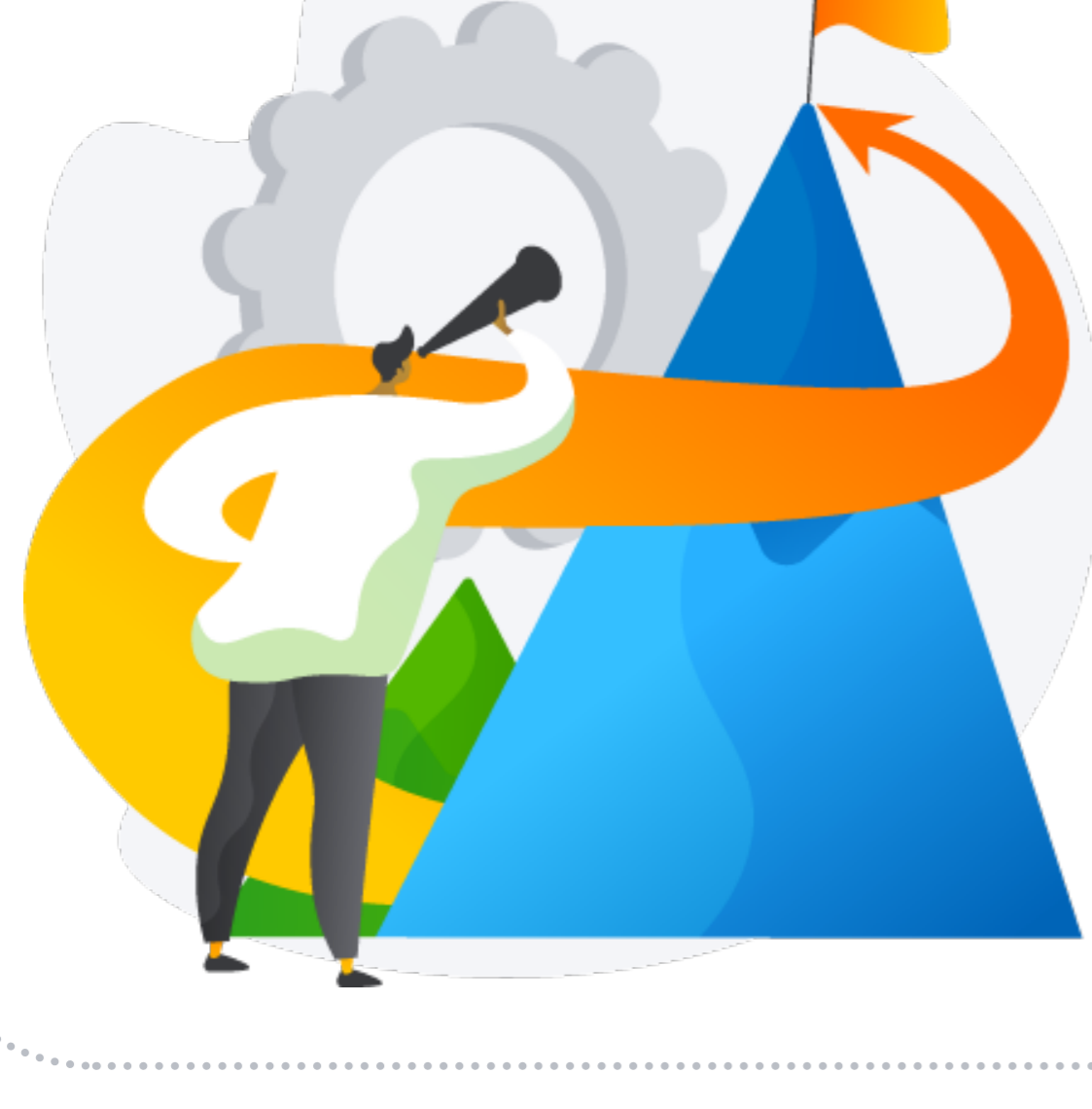


## Craft your MVP: mission, values, and purpose

Your MVP can help you:

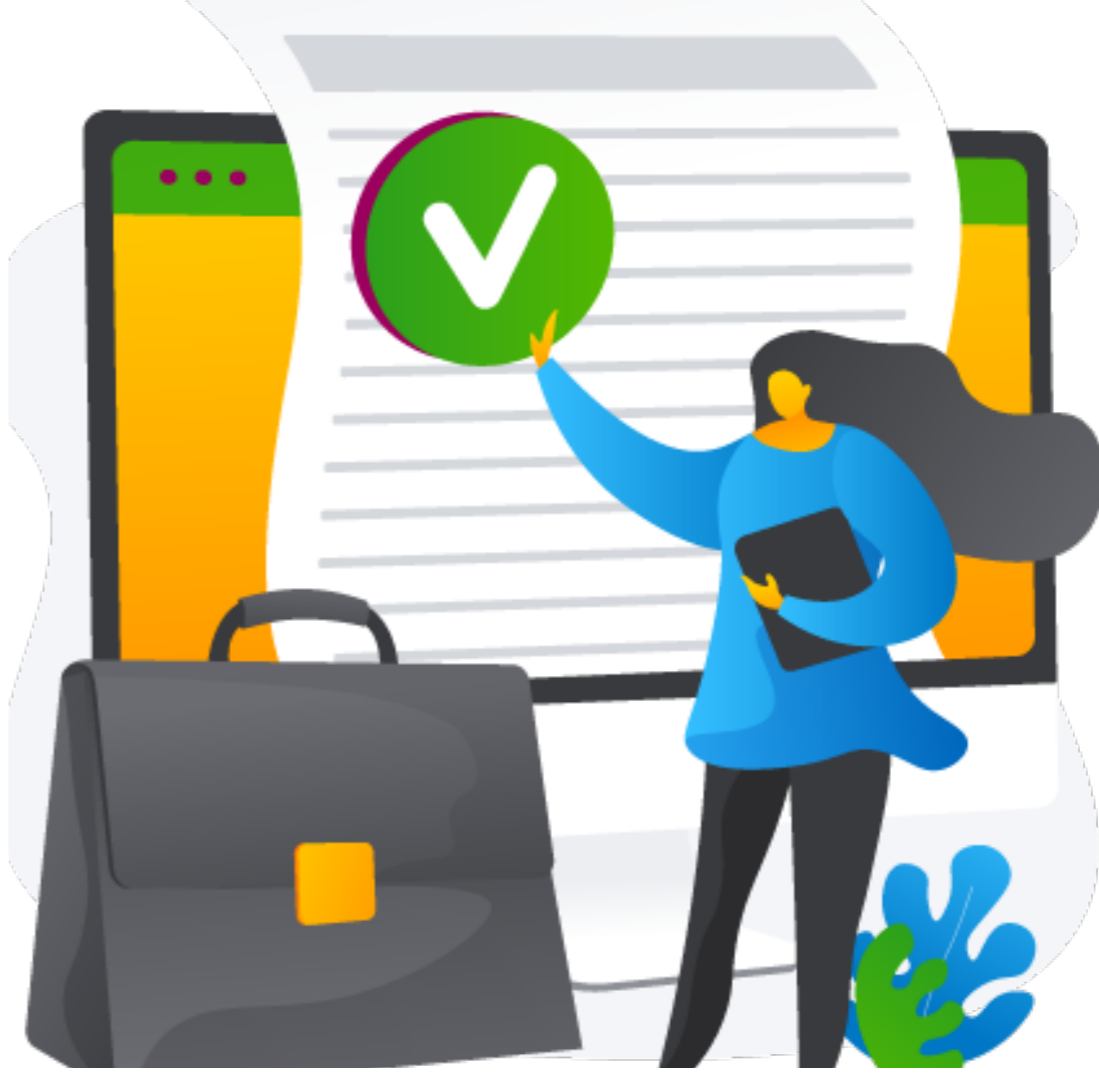
- Attract the right clients
- Attract the right employees
- Inform important decisions

Well-defined mission, values, and purpose statements serve as beacons to guide your practice as you transition into an advisory model. When you embrace them and actively integrate them into your firm, they can have a powerful impact on growth.



## Identifying your niche and unique selling points

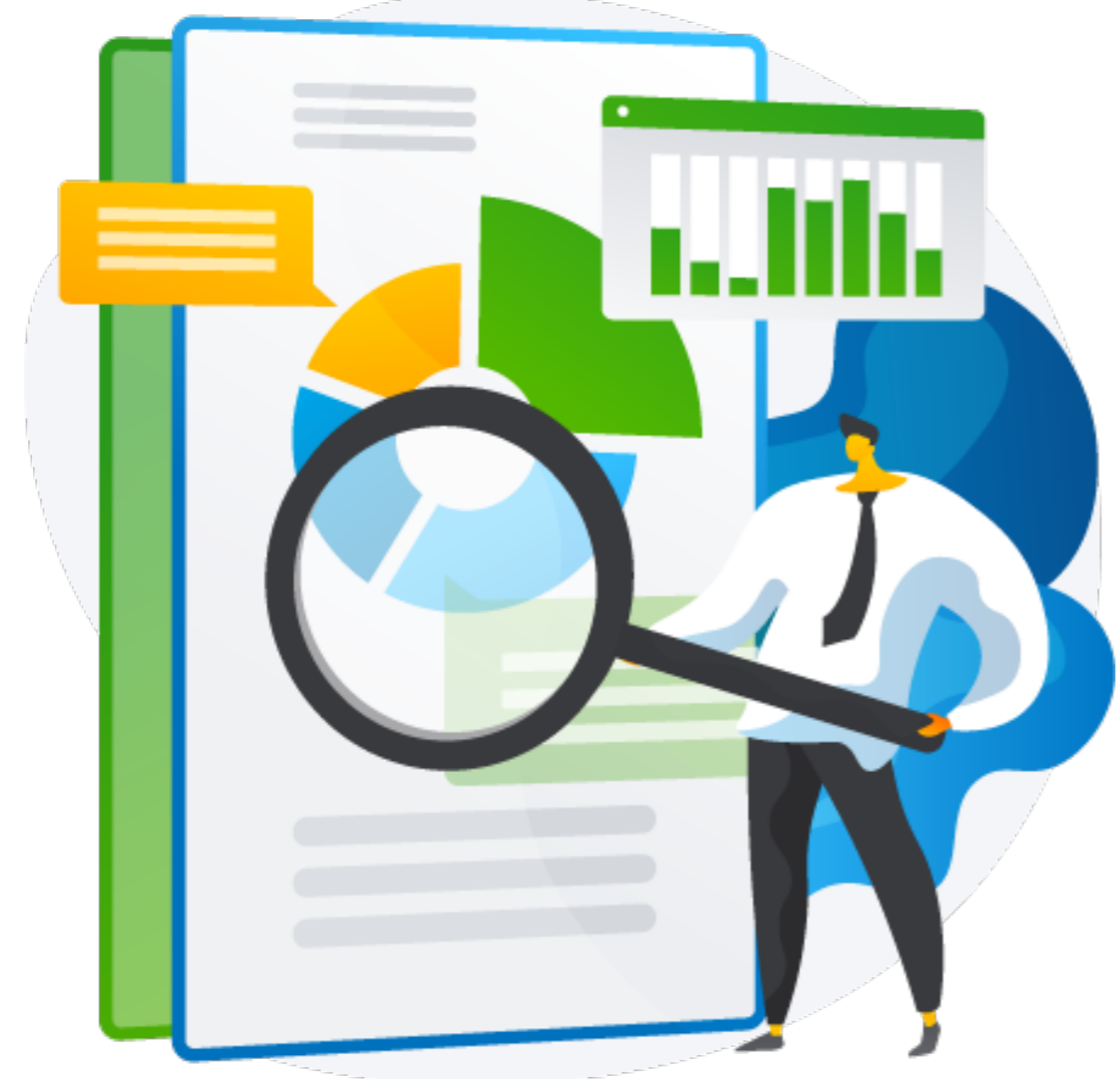
Clarifying your target audience and unique selling points can help focus your sales and marketing efforts to reach the right clients with the right messages. It enables you to stand out against your competition and makes it easier to articulate your value.



## Defining your tax advisory services

Tax advisory services that are adjacent to tax preparation are the easiest place to begin with advisory services.

Advisory firms start with client goals, identify specific tax strategies that align with those goals, work with the client over quarters and years to implement those strategies, and most importantly, measure and communicate the tax savings associated with those strategies.



## Defining your other advisory services

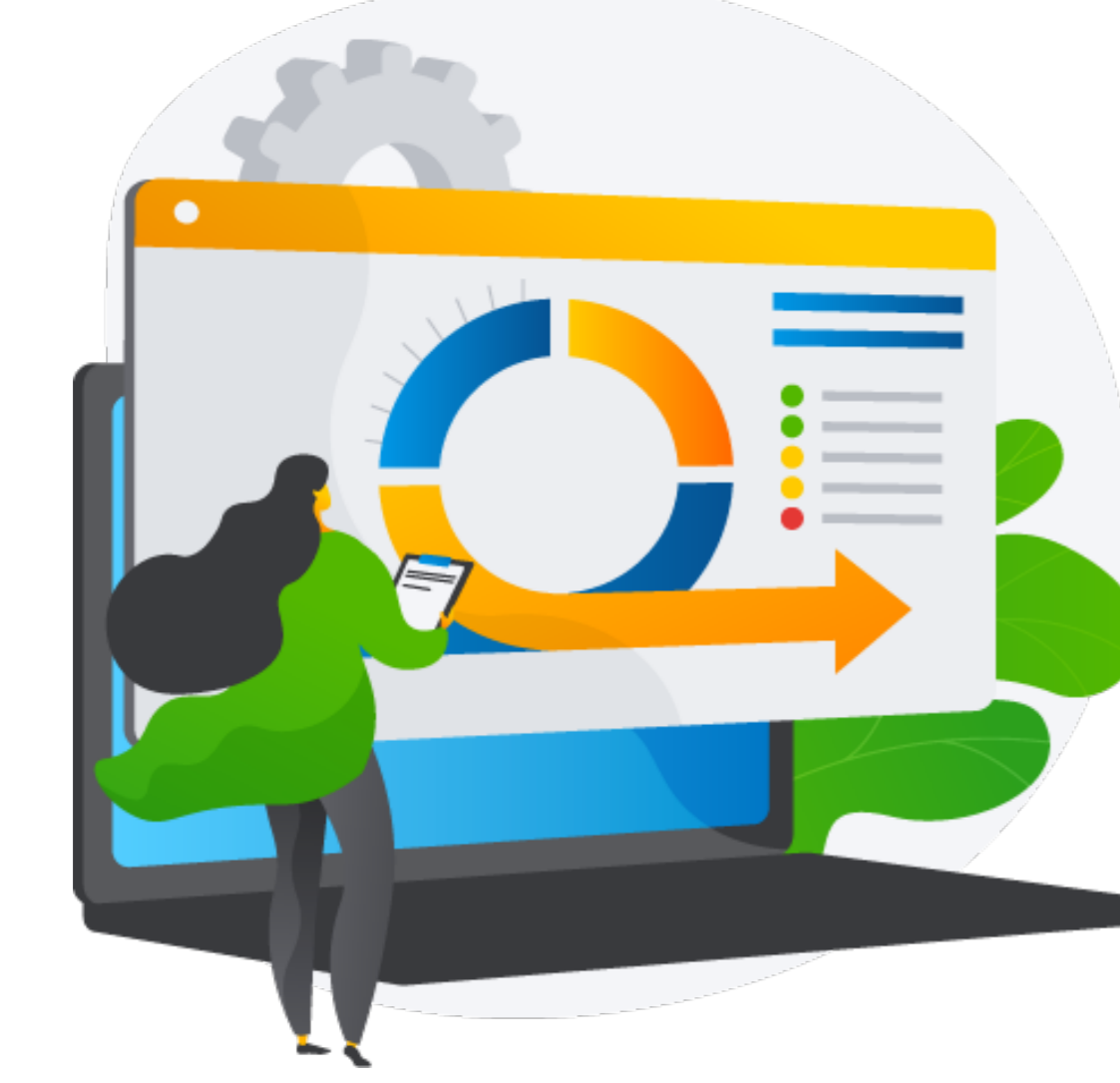
Not all advisory services are tax-related. Financial, operational, and technology advisory can pair well with tax planning and accounting.



## Planning your advisory workflow

Mapping your advisory workflow is the key to recognizing gaps and opportunities for automation and client collaboration. Every firm will have different details in its process, but the goal is to standardize the process.

Tips for mapping your workflow can be found in the detailed [Path to Advisory Guide and Workbook](#).



## Positioning and pricing your advisory services

Businesses in many industries are shifting to value-based pricing and subscription models, and advisory services are a natural fit for this transition.

You can find detailed pros and cons for different models and tips for calculating your pricing in the detailed [Path to Advisory Guide and Workbook](#).



## Developing your team

A strong team provides opportunities to divide and conquer – allowing each member to contribute their unique skills.

Following are a few tips to help make ongoing training a part of your practice:

- Set CPE goals.
- Provide access to resource information.
- Create a culture of sharing information.
- Set habits that reinforce your values and your culture.
- Reward what works.



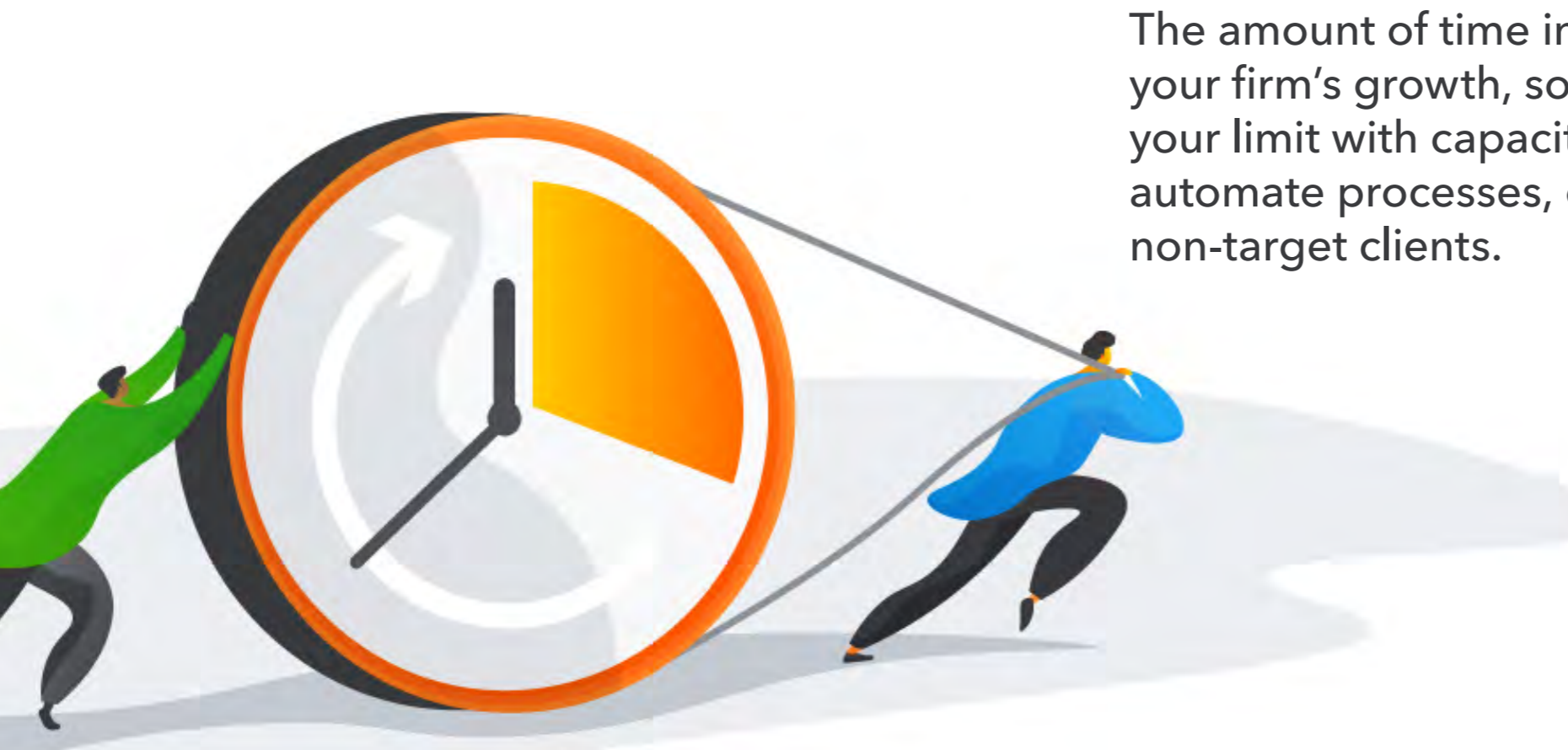
## Winning clients with content marketing

When you've got your plan and your team in place to offer advisory services, you just need to attract the right clients. Content marketing is a great way to engage your target audience and highlight your unique skills and offerings.



## Creating more capacity

The amount of time in a day is finite, and at any given point in your firm's growth, so is your capacity. When you have reached your limit with capacity, it is generally time to hire more staff, automate processes, or weed out less profitable, challenging, or non-target clients.



## Creating community

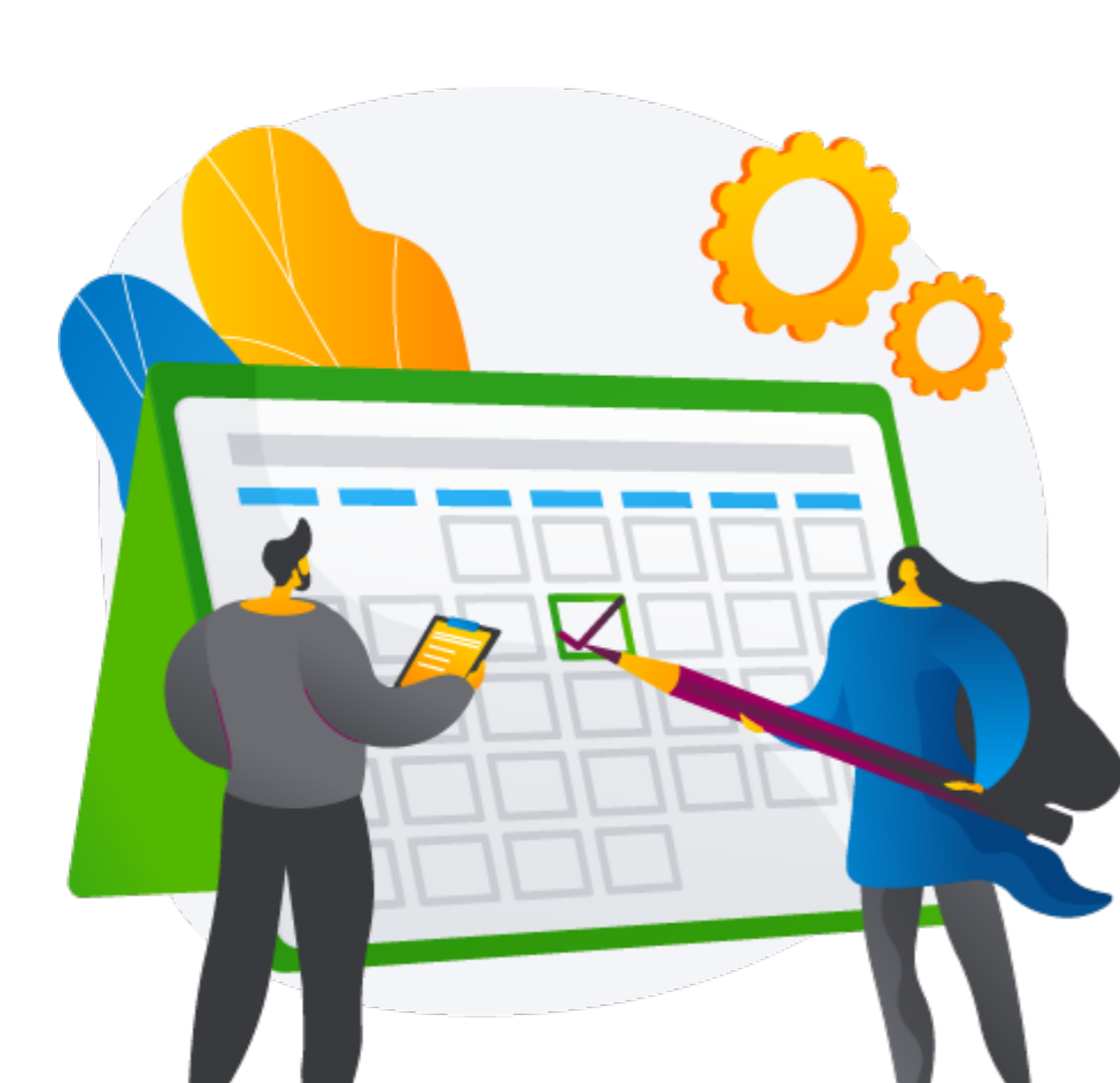
We all benefit from the insights and experiences of others. Find channels where you can nurture community in the field and share knowledge.



## Planning your project timeline

Change doesn't happen overnight. It is essential to set realistic timelines for milestones as you transition to a more advisory-oriented practice. The time estimates below provide a broad guideline, but timing will be unique to your firm.

- 3-6 months**
  - Planning your advisory workflow
  - Positioning and pricing your services
  - Developing your team
  - Implementing technology
- Ongoing**
  - Winning clients with content marketing
  - Creating more capacity
  - Creating community



## Meet the Pros of the Intuit Tax Council

The Intuit® Tax Council is a group of tax professionals who generously volunteer their time and expertise to help empower professionals to drive prosperity for their clients and firms. We have combined their shared knowledge, experience, processes, and tools into a detailed guide and workbook to help tax and accounting professionals consider, plan, and make a transition towards advisory services in their practice. [Download the full guide here.](#)

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