

A man in a dark t-shirt with the 'clarity' logo is standing and presenting to a group of people seated around a table. The table has several glass water bottles and a bowl. The background shows a presentation screen with some text. The entire image has a blue tint.

clarity.[®]

NextGen Advisory Blueprint

v 4.1 June 2026

TL;DR

(summary if it's too long and you don't have time to read)

The NextGen Advisory Blueprint

certainty | predictability | consistency

A complete, step-by-step implementation and education plan for your team, building a modern business advisory service within three months (working just 90 minutes a week).

Save 67% of your time

compared with doing advisory the old way

Makes “selling” advisory easier

(our members' average conversion rate is 66%)

97% increase in profitability

Elite Academy members averaged over 12 months

And the results come fast

Matt McConnell of Pulse Accounting (a solo partner firm with no advisory history) booked 7 client meetings by the Thursday of our Accelerator, sold a £22k advisory engagement by Friday lunchtime, and generated a further £44k on the Monday back in the office.

He ran a different meeting with clients he already had. That meeting is what the Blueprint installs in your firm.

NextGen Business Advisory

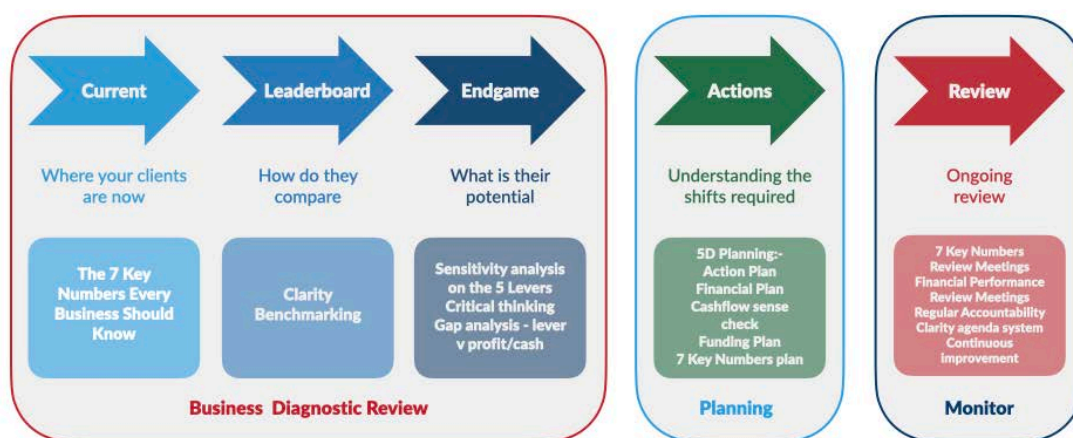
Most accounting firms that try advisory are running a model that quietly works against them. The average compliance-only firm makes a profit of £118k per partner. Add advisory the traditional way (partner-led, bespoke, built on instinct rather than a repeatable system) and profit falls to £83k, a 30% drop. Firms running NextGen Advisory average £389k, three times the compliance-only baseline. The model is broken, and it has been broken for a long time.

Part of the problem is inheritance. The frameworks most firms reach for haven't changed much since the Big 4, McKinsey, and Bain built them in the '80s and '90s. They were designed for large organizations, not for small businesses, and the world has moved on.

The other part is the word 'advisory' itself. It implies advice, and giving advice is one of the last things you should be doing. As Peter Block put it in *Flawless Consulting*, giving advice in the arena of human problems is generally one of the quickest paths to failure as a consultant. NextGen Business Advisory gives less advice and asks more questions. In simple terms: helping business owners understand their numbers, make informed decisions, and take action to achieve their goals.

The delivery system is the CLEAR Advisory Map: Current (where the client is now, grounded in the 7 Key Numbers), Leaderboard (how they compare to their peers through benchmarking), Endgame (what is achievable, using sensitivity analysis on the 5 Levers of Success), Actions (the specific steps that close the gap), and Review (ongoing accountability). It is the same journey a client travels in their first meeting and in every meeting thereafter, with increasing depth. It engages the entire team, plays to the inherent skills accountants already have with numbers, and enables you to deliver advisory services consistently, more efficiently, and more cost-effectively than the traditional approach.

The CLEAR Advisory Map



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clarity.

Regular structured meetings hold the small business owner accountable. And because the focus is on the actions that drive the numbers in the right direction, clients' goals are achieved consistently rather than occasionally.

Why now

The ground under the profession moved. In November 2025, Intuit put QuickBooks, TurboTax, and its enterprise suite live inside ChatGPT. In March 2026, Xero partnered with Anthropic to roll out JAX, its Claude-powered AI agent, to 4.6 million subscribers. In April 2026, Intuit also went live in Claude. Accounting platforms are embedding themselves into every consumer AI surface, which means your clients no longer need to open their accounting software to ask about cash flow. They ask the AI on their phone and get an answer straight from their books.

But the platforms can tell a client what their numbers are. They cannot tell the client what decisions to make about their business. Data retrieval and transactions, not diagnosis and judgment. Decisions need a methodology, accountability, and a person with a stake in the outcome. That is the gap the platforms cannot fill, and the firms that claim it now will own the client relationship for the next twenty years.

The Blueprint exists to get you across that gap in 90 days: a proven methodology, installed in your firm, delivered by your existing team, before the habit of asking the platform becomes the habit of not calling you.



Who is this Blueprint for?

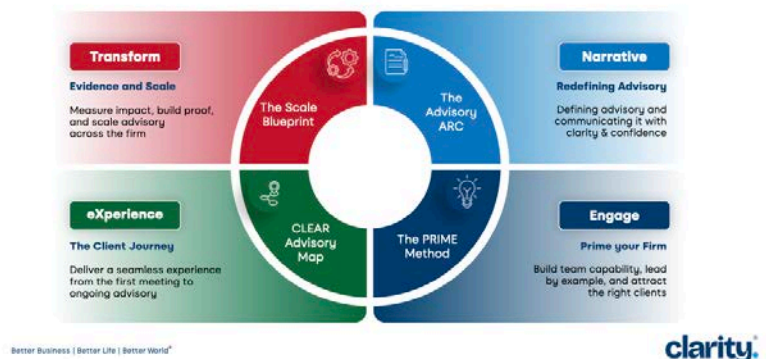
This is for your firm if you:

- **are thinking about introducing business advisory services**, but are not sure if you have the clients, or whether this is something you could deliver;
- **already know you have clients you want to help**, but don't have the structure to do it systematically;
- **want to save 67% of the time** you spend on the ad hoc, bespoke advisory you're already delivering;
- **want to scale advisory** beyond your top 10–15% of clients and beyond the partners who currently deliver it;
- **want to boost profitability in advance of a sale** (multiples are usually based on EBIT rather than GRF, even though they may be expressed as a multiple of GRF). We have firms that have increased profitability by over £125k within 12 months prior to sale; or
- **want to educate your team** on listening to clients, building their confidence, demonstrating value, and selling additional services.

Why NextGen Advisory overcomes the challenges cited by many firms

The challenges firms cite when implementing or scaling advisory are remarkably consistent: lack of structure, no time, lack of resources, low confidence or know-how, overwhelm (usually compliance), and clients who don't get it or won't pay for it. The Blueprint answers each one directly.

NextGen Advisory



Structure

Clarity provides a fully systemized and structured approach to marketing, pricing, selling, and delivering business advisory services. Nothing is left to improvisation.

Time

NextGen Advisory reduces the time spent on traditional (bespoke) advisory by approximately 67%, giving you back time or the capacity to serve more clients. The Blueprint shows you how to implement and scale an advisory offering in just 90 minutes a week over a three-month period.

Resources

We help you maximize your existing team's potential and show you how to do more with less. NextGen Advisory plays to the inherent strengths of accountants, and members on our Elite program increased, on average: revenue by 19.22%, gross profit by 19.92%, revenue per employee by 20.6%, capacity by 100%, and net profit by 97%.

Confidence and know-how

Numina, our methodology-driven AI, gives your team confidence as they prepare for meetings and speak with clients. It runs on the same frameworks the Blueprint teaches (the CLEAR Advisory Map, the 7 Key Numbers, and the 5 Levers), so it prepares your people for the meeting you actually run rather than generating plausible-sounding generic advice. Behind it sits world-class education built by practitioners who have done this with thousands of firms around the world.

Overwhelm

Our resources, templates, agendas, education, scripts, systems, and processes are designed to help you escape overwhelm (generally in compliance) and provide a clear plan to drive your firm where it needs to be.

Clients don't get it

Clarity is built especially for small business owners. The platform's simplicity and visual nature help clients understand the value you deliver. The pricing systems make sense given their entrepreneurial nature. And the process generates consistent results. With Clarity, you are selling clients what they want, in a language they understand.

The Blueprint

Built by accountants for accountants, on the back of years of experience working with hundreds of accounting firms implementing business advisory. We know what works and why. We also know what doesn't. You can jump the curve and avoid the mistakes many others make.

YOUR ADVISORY POTENTIAL
Unlock the full potential of your business advisory services

Clarity
A clear and complete understanding of the why and what of repeatable scalable business advisory services.

Capacity
Making sure that the firm has the capacity to deliver and systems in place to avoid scope creep and over-engineering compliance.

Courage
Having the courage to take the first step to making a difference to the lives of your clients and team

Confidence
Being confident in your inherent abilities, coupled with the power of AI, and repeatable scalable advisory to be the guide your clients want and need.

Collaboration
Unlocking the power of the team to scale your business advisory services across the firm to many more of your small business clients.

5 Key Requirements for Business Advisory

- Clarity: 100% (Score: 100%)
- Capacity: 30% (Score: 30%)
- Courage: 20% (Score: 20%)
- Confidence: 40% (Score: 40%)
- Collaboration: 20% (Score: 20%)

Overall Score: 33%

Working with you, hand in hand, over a 90-day period, we focus on the five key requirements of a successful advisory implementation: Clarity, Capacity, Courage, Confidence, and Collaboration. We give you the tools, structure, resources, education, and support to make NextGen Business Advisory a success in your firm.

From just 90 minutes a week over three months, you will achieve tangible results. In fact, the only reasons you could fail are:

- You don't spend 90 minutes a week.
- You have a predetermined mindset that this will fail.
- You don't follow the step-by-step process.

The Blueprint

Depending on the size of the team (we recommend three if possible: a leader, a doer, and a supporter), the process and the results you can expect are set out below. Some firms treat this as an educational program for their team without expecting results. Others want those 5 clients paying the firm £457/US\$687/AU\$717/€507 per month by the end of the 90 days.

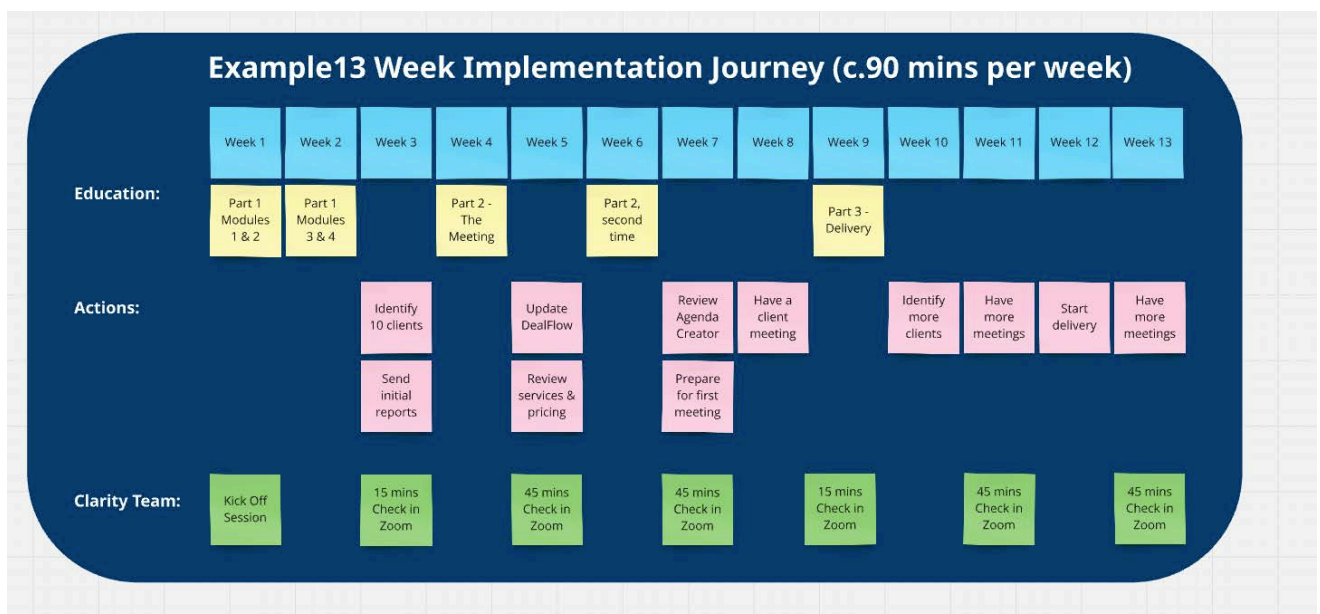
NextGen Advisory Blueprint



Think of it as your proof of concept.

Implementation Plan

Example



NextGen Advisory Blueprint: what you get

Bespoke implementation plan for your firm

During your individual kick-off call, we review our mutual responsibilities, understand your expectations and goals, and work with you to develop an implementation plan that suits your specific needs and timeline.

Full access to Clarity (unlimited team, unlimited clients)

Access to the Clarity platform at the Strategic Partner level, including Benchmarking, Numina (our methodology-driven AI), and the latest updates, including Business Diagnostic Reviews (compliance+, advisory lite, and prospecting tools).

Education program for the team, for life

Lifetime access to our AdvisorU self-paced learning programs for you and the team. All the latest thinking and know-how from practitioners in the field, instructional videos, and best practice. Take it at your own pace, use it as a reference resource, and build confidence and knowledge within the team.

Resources to support and supplement your journey

All the resources you need to supplement your implementation journey, including checklists, scripts, systems, and templates, updated for best practice and what's working right now.

Scheduled one-to-one check-in calls with your team

Calls with your project team to discuss progress, answer questions, celebrate wins, practice, and overcome any specific challenges. The content of the calls depends on your team's specific requirements and adapts as you go.



Access to weekly group coaching and accountability calls

Optional weekly group coaching and accountability calls, where we share wins, provide help and support, and answer questions on any element of the program. Attend as many or as few as you need.

Team profiling

It's essential to have the right team on the project from the outset, and to know their strengths and communication preferences. Our team profiling tool gives you a different perspective: an entrepreneurial variant on the standard format, focusing on the positive and highlighting each individual's strengths rather than examining where they struggle under pressure.

The price of the program+

Total investment **£4,999** (a one-off payment, plus sales tax), **or**

pay in three installments of £1,999 (plus sales tax);
please note there is a commitment to make all three payments

This program includes up to 3 team members. *From experience, we know this is the optimal maximum level for the program.*

+From the outset, we let you behind the curtain, share the secret keys, and go above and beyond to make this a success for you. You get immediate access to education, downloads, the platform, and our time. As a result, you explicitly waive any rights to a cooling-off period, if applicable in your jurisdiction. Alternatively, if you wish to retain your cooling-off rights, let us know before you purchase, and we will wait for the required period.

The total value of the Blueprint is £10,353: access to the Clarity platform for three months £2,487, lifetime access to the AdvisorU education program £497, resources £997, team profiling £375, bespoke implementation plan £1,000, Double Your Capacity Blueprint £1,997, and coaching, mentoring, and accountability £3,000.

And the math from there is simple. Five clients at £457 (US\$687) per month amount to £27,420 of GRF per year, against a one-off investment of £4,999. Matt generated £66k in a week. Sharon Baker from Kinder Accountants generated £82k in three months. The program is designed to pay for itself before it finishes.

What comes after the program

After the 90 days, you get to choose the Clarity partnership level that's right for you, or not. You will default to **Business Advisor** with our standard terms (including one calendar month's notice) unless you let us know in advance. The current price for this level is £829 per month (plus sales tax). See below for up-to-date pricing.

Either way, you keep access to the knowledge, education, and resources, which are well worth the investment alone. *You may have to reduce the number of clients on the platform, depending on the level you choose.*

And for firms that want to go further, the Blueprint is the first step on a longer journey: the NextGen Accelerator (our three-day flagship live event, where firms leave with meetings booked and clients signed) and the Academy (our 12–24 month program for building the whole firm, not just the advisory offering). Blueprint proves the concept. Accelerator accelerates the conviction. Academy builds the firm.

Clarity partnership levels

Check out all our current pricing levels here
clarity-hq.com/pricing





Compliance is not dead. But the firms that add a repeatable advisory service on top of it triple their profits: the average compliance-only firm makes £118k, traditional bespoke advisory drops that to £83k, and NextGen Advisory takes it to £389k.

Traditional business advisory

Traditional advisory has never found the right combination of people, process, and technology. It relies on partners or managers to deliver; there isn't enough time, it's difficult to scale, and only the top 10–20% of clients can typically afford it. That is why it cuts profit instead of growing it.

Repeatable business advisory

Clarity HQ is the NextGen Advisory system that helps you introduce and create a profitable, repeatable, and scalable advisory service for your firm. We help progressive accountants define, market, sell, price, deliver, and scale business advisory, delivered through the CLEAR Advisory Map by the team you already have.

From 90 minutes per week

Starting with just 90 minutes a week for the first three months, our step-by-step implementation plan, education systems, and Member Success Team help your firm secure its first advisory clients within the program. Thereafter, we help you build a well-respected, successful, transformational accounting firm that earns three times your existing profit, with a happier team and happier clients.

Clients love it and 'get' it

Our multi-award-winning system creates significant value for your small-business clients at a price they'd love to pay.

Contact us

Book a discovery call with one of the team to see what a difference Clarity could make to your firm.

www.clarity-hq.com



Penny Rowden
Rowdens



£120k in extra profit within six months with exactly the same team. Steven & Aynsley turned overwhelm into a sale-ready, profitable firm. Stop tinkering — follow their plan and the ROI is tremendous. It's not a cost unless you do nothing. If you get the chance to work with them — take it!