



Your 90-day NextGen Advisory Blueprint

clarity.®

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 to doing advisory the old way)

Clarity Makes "selling"* advisory easier (our members' average conversion rate is 66%)

Members of our Elite Accountants group averaged a 97% increase in profitability in the last twelve months

"We generated over £32,000 GRF within the first month alone! What an incredible and fast return on investment. We now know the potential for our business advisory services, and our plans are huge for the next twelve months. Don't hesitate, you will regret it if you do..."

Matthew McConnell, Pulse Accountants

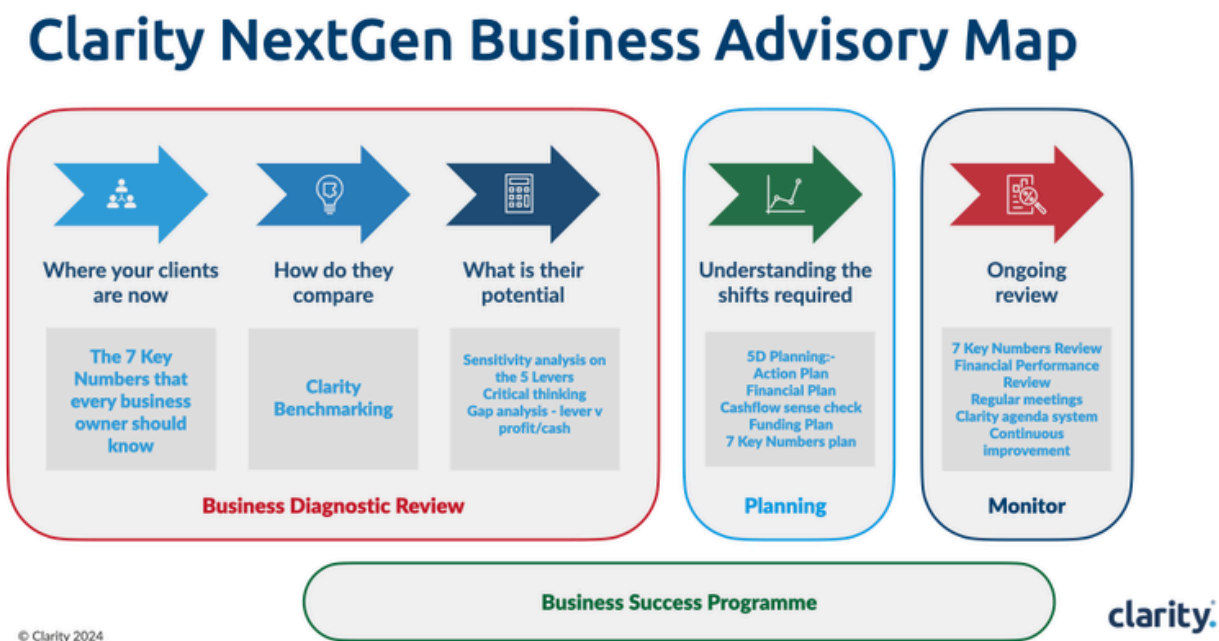
NextGen Business Advisory

Many accounting firms struggle to implement business advisory. The main reason is that they are introducing a framework that hasn't changed much from those created by the Big4, McKinsey, and Bain in the '80s and '90s. These methodologies were built for large organizations (not SMEs), and quite simply, the world has moved on since then.

The other main reason is the word 'advisory'! It implies advice. Giving advice is one of the last things you should be doing. In fact, according to experts, "giving advice in the arena of human problems is generally one of the quickest paths to failure as a consultant."

NextGen Business Advisory is a complete shift in the way reporting and advisory are delivered. This revolutionary approach leverages cloud architecture and infrastructure and the latest AI, using a highly systemized structure to deliver advisory. It engages the entire team and means you can now deliver business advisory services consistently, and more efficiently and cost-effectively than traditional advisory.

NextGen Business Advisory is a holistic approach and all about helping small business owners, giving less advice and asking more questions. In simple terms, it can be defined as "helping business owners understand their numbers, make informed decisions, and take action to achieve their goals."

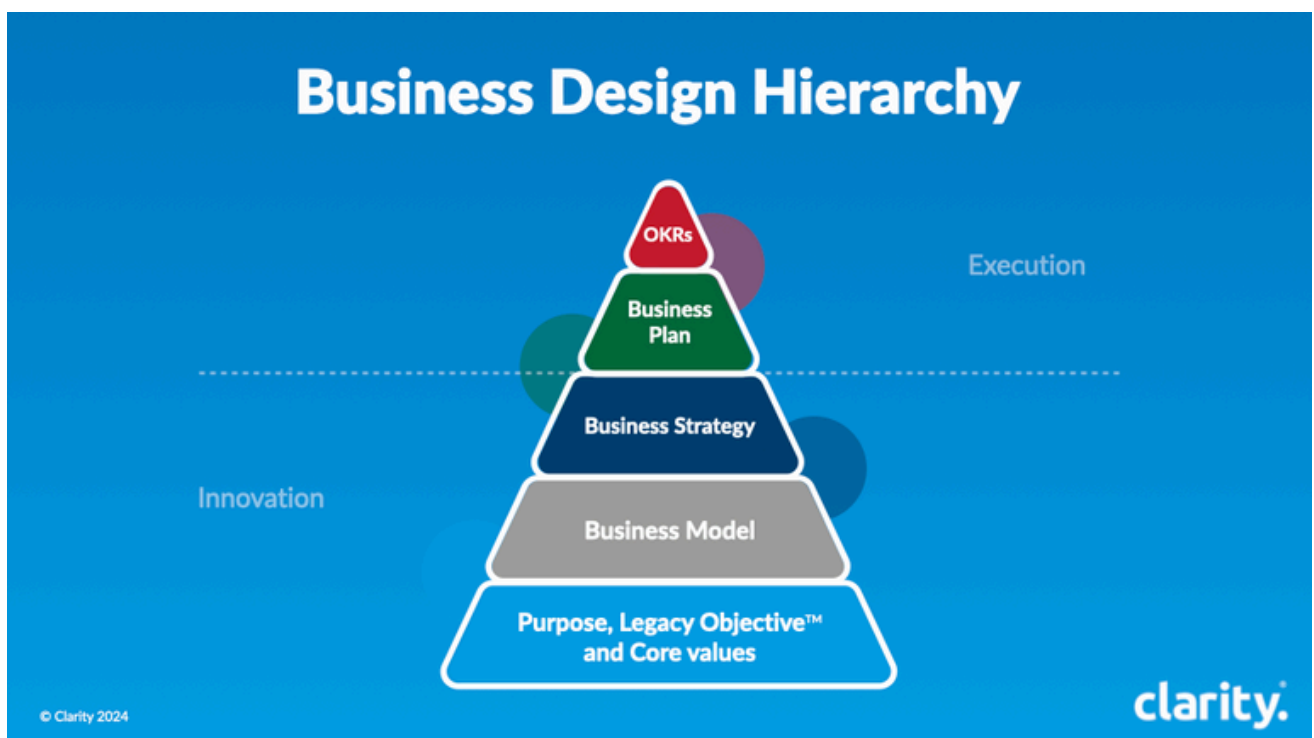


Using the inherent skills that accountants have with numbers, NextGen business advisory helps business owners understand their current financials, their potential, and how they can get there. It provides a bridge so that business owners, with the help of their accountants, can understand the financial implications of the decisions they are taking (sometimes in advance of making those decisions) and, by so doing, de-risks business. Regular structured meetings hold the small business owner accountable, and by focusing on the right actions that drive the numbers in the right way, clients' goals are achieved consistently.

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 if this is something that you could deliver;
- already know you have clients you want to help but don't have the structure to do so, systematically;
- want to save 67% time on the ad-hoc bespoke business advisory services that you're already delivering;
- want to scale business advisory services to more than your top 10/15% of clients;
- 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 who have increased profitability by over £125k within 12 months prior to sale; or
- want to educate your team on the importance of listening to clients, build their confidence, demonstrate value and sell additional services.



Why NextGen Advisory overcomes the challenges cited by many firms

The challenges cited by accounting firms in implementing or scaling business advisory are standard. Whilst not exhaustive, the list usually includes:

- Lack of structure
- No time
- Lack of resources
- Low confidence or know-how
- Overwhelmed (by compliance)
- Clients don't get it (or want to pay for it)

Structure

Clarity provides a fully systemized and structured approach to marketing, pricing, selling and delivering business advisory services.

Time

NextGen advisory reduces the time spent on traditional (bespoke) advisory by approximately 67%. Giving you back time or the ability to serve more clients. Our blueprint will show you how to implement and scale a business advisory offering in just 90 minutes a week over a three-month period.

Resources

We help you maximize the potential of your existing team. We show you how to do more with less. NextGen advisory plays to the inherent strengths of accountants and members on our Elite Firm 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/know-how

Our expert-led AI, gives the team the confidence in preparing for meetings and speaking with clients. Our world-class education is built by experts in the field on the back of many years of experience and working with thousands of firms around the world. And our process plays to the skills of accountants.

Overwhelmed

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

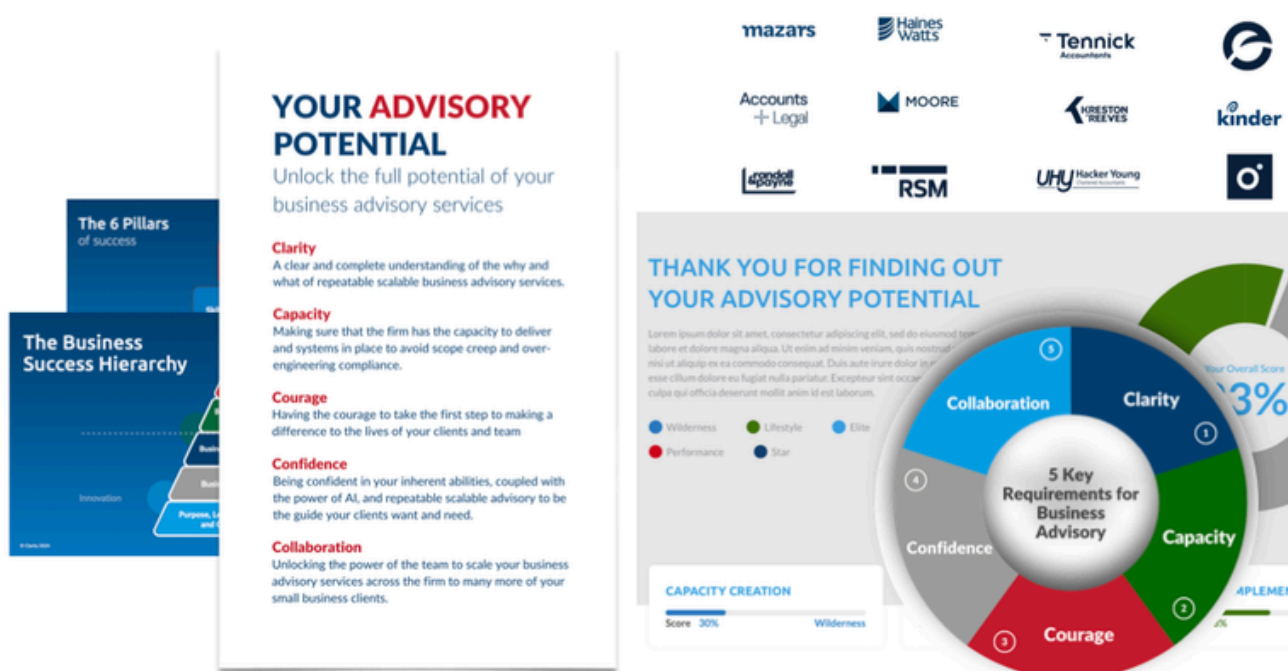
Clients don't get it

Clarity is built especially for small business owners. The simplicity and visual nature of the platform help clients understand the value you can deliver and how you can help. The pricing systems are built to make sense to 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 basis of many years of experience from and 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.



Working with you, hand-in-hand, over a 90 day period, we focus on the five key elements of a successful business advisory implementation plan.

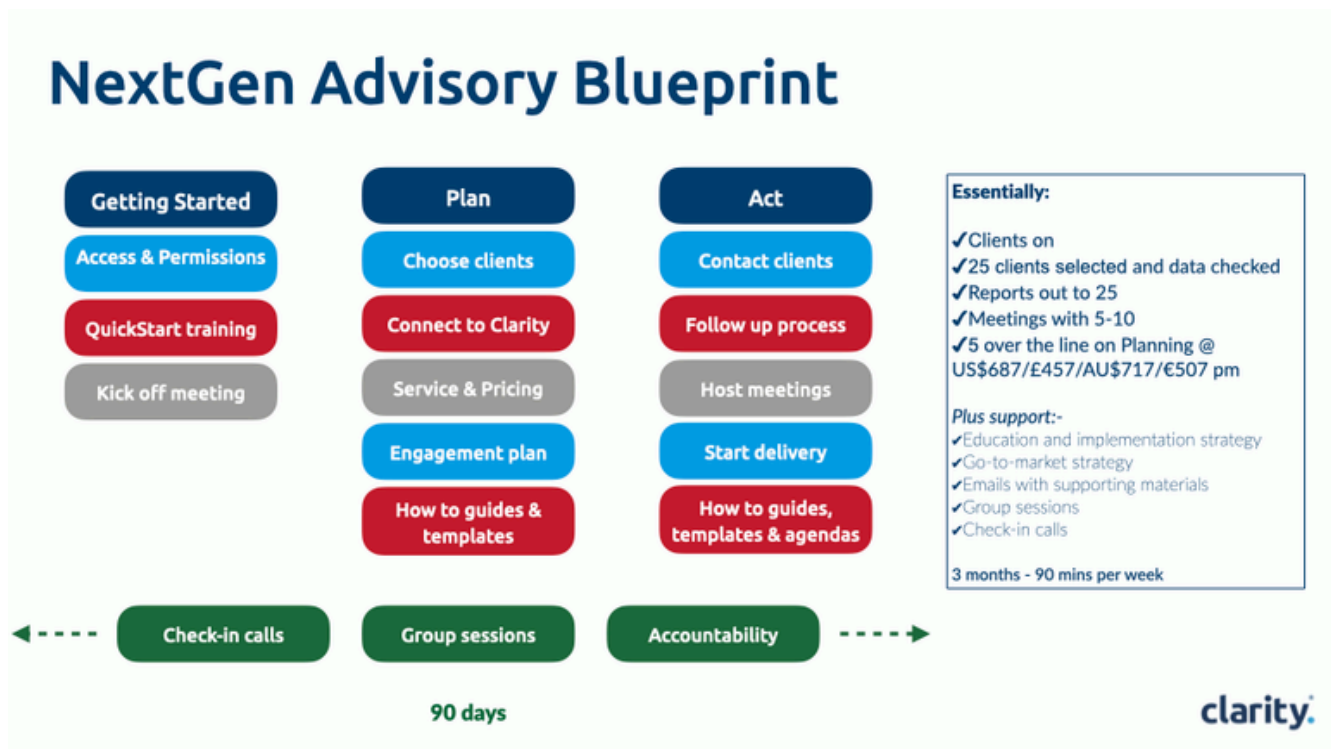
We give you the tools, structure, resources, education and support to make NextGen Business Advisory a success in your firm.

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

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

The Blueprint

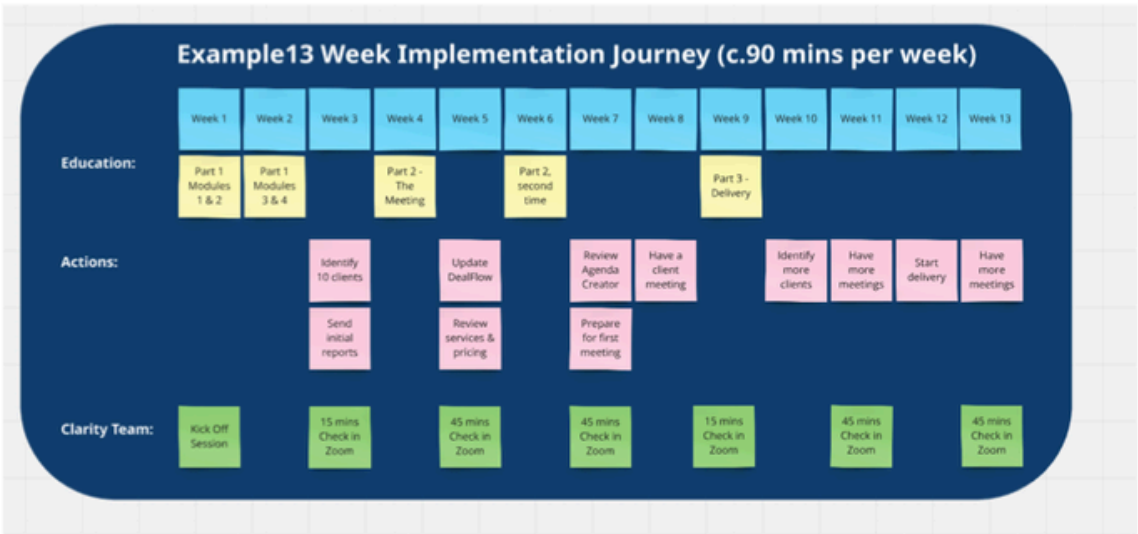
Depending on the size of the team (and we recommend three if possible - a leader, a doer and a supporter), the process and the results you can expect are below. Some firms will look at this as an education program for their team without expectations of results. Whilst others will want those 5 clients paying the firm £457/US\$867/AU\$717/€507 per month from the 90 day program



Think of this as your ‘proof of concept’ as it were and an example plan is below:

Implementation Plan

Example



NextGen Advisory Blueprint

what you get



Bespoke Implementation Plan for your firm

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

Full access to Clarity (unlimited team/unlimited clients)

Access to the Clarity platform at Business Advisor level, including access to Benchmarking and AI modules, and the latest updates ,including Business Diagnostic Reviews (compliance+/advisory lite/prospectingt tool)

Education programme for the team for life

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

Resources to support and supplement your journey

All the required resources to supplement your implementation journey in business advisory, including checklists, scripts, systems etc updated for best practice and what's working right now.

Scheduled 1-2-1 Check in calls with your team

Calls with your project team to discuss progress, answer questions, celebrate wins, practice and overcome any specific challenges you may have. The content of the calls will depend on the specific requirements of your team and will be adapted as necessary.

Access to weekly group coaching and accountability calls

Access to optional weekly group coaching and accountability calls, where we share wins, provide help and support and answer any questions you may have on elements of the program. Attend as many or as few as you need.

The price of the program+

Total Investment* **£2999** (a one-off payment, plus VAT), or

pay in three, with installments of **£1199*** plus VAT
(please note that there is a commitment to make all three payments)

** This program includes up to 5 team members. You can pay an additional fee of £199 plus VAT per team member thereafter (or an extra £69 per month plus VAT if you prefer to pay over 3 months).*

+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 will 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 exercise your rights to a cooling-off period, please let us know before you purchase, and we will wait for the required period for you.

The total value of the Blueprint £6,741:-

Access to Clarity Business Advisor for three months £2,247, Lifetime access to our AdvisorU Education Program £497, Resources £997 and Coaching, Mentoring and Accountability £3,000

What comes after the program

After the 90 days, you get to choose the Clarity partnership level that's right for you, or not.

Regardless, you get to keep access to the knowledge, education and resources (which are well worth the investment alone!)



Contact us

Get in touch to find out your potential, whether you are the right fit and ask us any questions. Join the revolution, a community that is transforming the lives of firm owners, their team and clients!

Clarity partnership levels

UK

COMPLIANCE+

£239

per month when billed annually
£299 per month when billed monthly

Platform

- ✓ Unlimited team and 100 clients
- ✓ Portfolio View - a snapshot of all your clients' data on one screen
- ✓ Benchmarking - ability to benchmark your clients by sector and location
- ✓ Business Diagnostic Review - "Advisory Lite" - quickly identify your clients' profit & cash improvement potential and co-create an action plan for each client
- ✓ AI - used advanced AI to help you select clients, analyze data, and generate action plans
- ✓ Agendas - to help you deliver meetings and accountability calls
- ✓ DealFlow - 2 Boards for pipeline management of Advisory and Funding opportunities

Implementation

- ✓ Free access to QuickStart online or join the NextGen Advisory Blueprint

Support

- ✓ Access to Account Management for regular check-ins
- ✓ Access to group training sessions

BUSINESS ADVISOR

£599

per month when billed annually
£749 per month when billed monthly

All at Compliance+ level plus

Platform

- ✓ Unlimited team and 250 clients
- ✓ Financial Planning Module - instantly create financial plans (based on agreed action plan numbers) and sense check from a cashflow perspective
- ✓ Financial Performance Review Module - instantly see how your clients are doing against their plans, what's working and what's not
- ✓ Agendas - enhanced
- ✓ Service Maps - Accountability, Insights and Planning service lines prebuilt for you
- ✓ DealFlow - ability to create custom pipeline management boards

Implementation

- ✓ Free access to the Clarity Success Academy online or join the NextGen Advisory Blueprint

Enhanced Support

- ✓ Access to our dedicated Member Success Team

STRATEGIC PARTNER

£1199

per month when billed annually
£1499 per month when billed monthly

All at Business Advisor level plus

Platform

- ✓ Advanced AI
- ✓ Business Success Programme - deliver multi-year strategic planning sessions with clients using our business success programme, calculators, Purpose, Legacy Objective and Core Values, Business Modelling, Strategy, Planning, OKRs, One Page Plan etc
- ✓ Advanced Reports, Agendas, Task Management, Meeting Mode and Workflows

Implementation

- ✓ Build a customised plan with our experienced Member Success Team- and free access to the NextGen Advisory Blueprint

Enhanced Coaching and Accountability

- ✓ One-to-One mentoring for the firm, coaching and monthly accountability calls
- ✓ Access to enhanced education and support
- ✓ Specialist group training

all price are plus VAT

Unlimited users and a full licence for the firm's own numbers on all our paid plans, plus access to the Clarity Slack community

clarity.®



Compliance is not dead. However, studies show that firms who introduce a repeatable business advisory service triple their profits.

Traditional business advisory

In the past, traditional business advisory hasn't properly leveraged the right combination of people, processes and technology. It has been heavily reliant 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.

Repeatable business advisory

Clarity® is the complete business advisory platform that can help you introduce and create a profitable, repeatable and scalable business advisory service for your firm.

We help progressive accountants market, sell, price and deliver re-imagined business advisory services at scale.

From 90 minutes per week

Starting from just 90 mins a week for the first three months, our simple step-by-step implementation plan, coupled with our education systems and member success team, will ensure you generate \$37k/£30k/AU\$60 GRF, or your money back.

Thereafter, we help you build a well-respected and successful transformational accounting firm that earns three times your existing profit with a happier team and clients.

Clients love it and 'get' it

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

Contact us

Why not book a discovery call with one of the team to see what a difference Clarity could make to your firm?

www.clarity-hq.com



We generated £82k GRF within the last three months and our clients and team couldn't be happier.

Repeatable business advisory is the way to go! The platform, framework, and systems give the team the confidence to have more impactful client meetings. This stops partners from being the bottleneck and ultimately means we can support more clients. The support is amazing too!



SHARON BAKER
Kinder Digital Accountants

clarity.