

The Advisory Advantage, with Woodard & Xero



WOODARD

Upscaling your practice and your team with value-added client services.

About the workshop

This five-part workshop is a guide for bookkeeping practices and CPA firms that want to move beyond basic services. It's about shifting to a more comprehensive approach that helps clients with things like regulatory compliance, risk management, and financial analysis. This workshop provides a clear plan for building an advisory practice that is both scalable and profitable. Whether you're new to offering these services or want to improve your current offerings, this course will help you create a service model that meets your clients' needs.



Who is this for?

- Accounting and bookkeeping professionals eager to initiate or enhance their advisory services.
- CPA and EA firms that primarily focus on tax services and aim to diversify their offerings with year-round solutions.
- Managers of established advisory practices seeking to refine their business model, optimize workflows, or adjust their service pricing for greater effectiveness.

The takeaways

- Ability to define the five main areas of client advisory services (CAS).
- Structured lessons, group discussions, and practical resources like templates and checklists
- Understanding of the difference between financial planning & analysis (FP&A) services and CFO services to set the right scope and price for each.
- A framework for organizing and growing advisory services using specific processes, team roles, and technology.
- Service models that fit the goals and challenges of small to mid-sized businesses.
- The right tools and templates to ensure consistency and efficiency in your advisory work.

The details

- Five virtual, live, two-hour workshops, with one additional booster session to review key concepts and address challenges
- Price: \$3,000 per person
- CPE credits: 10 hours

Oct 16
3-5pm ET

Intro to client advisory services

Oct 21
3-5pm ET

The controllership services model

Oct 23
3-5pm ET

FP&A and fractional CFO services

Oct 30
3-5pm ET

Technology for CAS delivery

Nov 4
3-5pm ET

Packaging and pricing CAS services

Apr 30
3-5pm ET

Spring booster session

