

**SERVICES TO
SUPERCHARGE
YOUR RESULTS**

www.nixonadvantage.com

“I would like to take this opportunity to thank Matt, Rob, Dean, and the entire Nixon Advantage team for the help and support over the last 12 months. We are ecstatic with the results we have achieved, especially those since February 2010 after returning from the coachingclub Conference in Hawaii. We have achieved an increase in our gross revenue of over 18 per cent and that obviously has a big impact on our bottom line and the team also.

The team at Nixon Advantage have given us the tools, strategies, and most importantly, the self belief we were looking for, which has made achieving our results so much easier.

This time 12 months ago, the stuff Matt and Rob were suggesting we thought was ‘pie in the sky’ stuff - how wrong we were. Thankfully, we just did it and held our breath as 12 months later, it all makes sense.

Extremely looking forward to the coming 12 months as we have now cleaned up our WIP (work-in-progress) from 12 months ago and cannot wait to see the true results shine through.

Thanks again and looking forward to learning more strategies and tools at the Conference on the Gold Coast in a couple of weeks.”

Peter Locandro
Zeccola Jordan & Locandro
Noble Park, Victoria, Australia

A MESSAGE FROM ROB NIXON



Since 1985 I have been growing and developing businesses. I have a passion for Accounting firms and their business clients, helping them both to improve their financial position.

I am not an Accountant and that makes all the difference. I do not think like an Accountant, which enables me to bring a fresh perspective that is practical and different.

Since 1994, Accounting firms, large and small, have been using my ideas and strategies to improve their financial position. Typical client results include improved revenue, profit, and cash flow. Clients are also achieving a better balance in their life with more time off and a greater sense of happiness.

In 2005, I created a revolutionary coaching process. My coachingclub clients are achieving results they never thought possible. With an additional four high powered Coaches on my team, I have developed a plethora of content, tools, systems and processes to truly supercharge an Accounting firm.

It is my mission to help Accounting businesses to experience significant improvement in their business performance through my coachingclub network.

In my view if you want to run a better business then you should first become a better business person; as 'the most trusted advisers to business' Accountants should be running better businesses than their advisees.

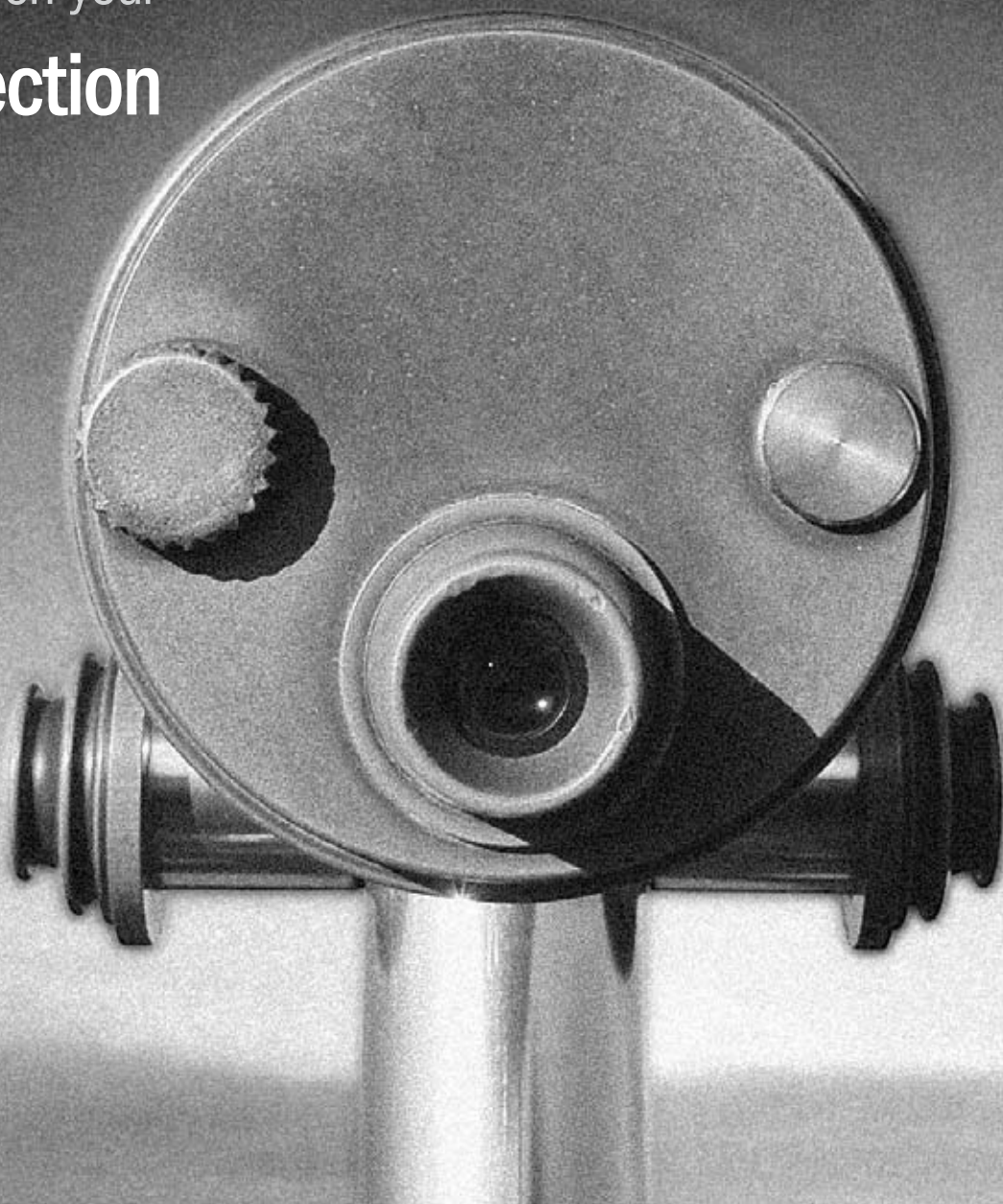
Please take some time to review our range of services outlined in this handbook. When you have done that, my team will be more than happy to discuss which options are most suited to your firm. Simply contact us by phone +61 7 **3607 6600** or email **performance@nixonadvantage.com**

All the best in your success,

A handwritten signature in black ink that reads "Rob Nixon". The signature is written in a cursive, flowing style.

Rob Nixon
CEO - Nixon Advantage Pty Ltd

sharpen your
direction



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COACHINGCLUB

This is our most powerful service for implementation and guaranteed results. If you are looking to expand your business, increase profitability, significantly increase your average hourly rate and solve staffing issues while at the same time working less and smiling a whole lot more, coachingclub is for you.

Be warned – this program is not designed to be ‘passive’. It is designed so that you get very involved; it is about sharing, learning and being held accountable. Your success in this program will come down to commitment, consistency and discipline.

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“...Prior to joining Nixon Advantage we were already a successful firm. The discipline and accountability involved in coachingclub, along with the interaction with our peers, helped us to take our business to a much higher level”.

Greg Brennan - Partner
Brennan Sloan Leahy
Mount Lawley, Western Australia

THE IDEA BEHIND COACHINGCLUB

Developed by Australia and New Zealand's leading consultant to the Accounting profession, Rob Nixon, the **coachingclub** program started with Rob's mantra:

“if you want to run a better business, then you should first become a better business person. As ‘advisers to business’ you should be running better businesses than the advisee”.

Every time we engage a new Accounting firm as a client, the first question we ask is “Why did you join?” Here is a sample of answers as to why Accounting firms, both large and small, are involved in **coachingclub**:

- Profit improvement
- Cash flow improvement
- Lifestyle improvement
- Grow the business
- Ability to sell the business
- Better reputation in the marketplace
- Become an employer of choice
- Less time at the office
- More holiday and family time
- Improve customer service
- Accountability to ensure my good intentions are turned into actions
- Faster throughput and workflow management
- Learning new ideas
- Networking with others
- Needed an enthusiasm injection
- Help to make better decisions
- Buy a bigger boat (Yes, that really was one of the reasons!)

In its simplest form, **coachingclub** is all about helping you to improve your financial performance... substantially. It is the most powerful implementation and results orientated program ever developed for the Accounting profession. There are three key elements to **coachingclub** membership:

ACCOUNTABILITY

for your project implementation and numbers growth

LEARNING

from your Coach, your immediate group members and the wider **coachingclub** community

SHARING

Intellectual Property so you stop reinventing the wheel

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“Every business owner needs their Accountant to experience coachingclub...”

Keiran Mulhall - Partner
Griffin Hancock & Moffitt
Rockhampton, Queensland, Australia

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP

MAXIMISED CASH FLOW

Although profits from a business venture are a measure of success, the flow of cash in and out of a business can be said to be its lifeblood.

Cash flow planning is critical to the survival and growth of any business.

Unless cash is available at the time it is required, the business may have to close its doors, even though profits are being earned.

There are three components you need to consider with cash flow:

- 1 How profitable your firm is;
- 2 Your work-in-progress (WIP) time frame and your invoicing process around that; and
- 3 Your collection process with money.

When you get all three in sync, you will have much stronger and more effective cash flow.

Our coachingclub program provides you with a range of outstanding workflow management systems to promote fast turnaround times (less than 10 days) and strategies to ensure clients pay you when you want them to which will drive your 'lock up' (WIP and debtor days combined) consistently below 40 days throughout the year.

Not only that, coachingclub is designed to give you the guidance and support you need to overcome any hurdles and ensure that you implement these new systems and strategies successfully. As a result you will experience greatly improved cash flow and control, allowing you to do the things you want, when you want.

- ① [Keep reading to find out more about what being a member of coachingclub could achieve for you...](#)



you have the **power**

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP

OPTIMAL SECURITY

Gaining optimal business security is all about having ‘things’ in place. Things like:

- Systems that work seamlessly
- Risk management processes
- Up-to-date shareholders and employee agreements
- A broad range of diversified services
- Even revenue spread amongst client groups
- Fully electronic knowledge and document management systems

The business works without the reliance on key people, thus making it easier for succession planning.

To explain further, take a moment to think about your team and what impact it would have on your business if one (or more) of your key people, for whatever reason, were to walk out the door and not come back – after all it can (and does) happen.

At the end of the day an Accounting firm sells knowledge. One of the biggest assets an Accounting firm has – that is not on the balance sheet – is ‘knowledge’ – the know-how of the firm.

We all know we need to train people so that they have more knowledge to do their job better. However, what happens each day to the knowledge you have invested in? It walks out the door – and sometimes it does not come back! It is therefore imperative to have properly documented, step-by-step systems in place that someone would follow to ‘self-train’ on how to use your systems.

Here is another question for you...

“Do you have adequate working capital available to anticipate and support growth in your business?”

Then there is the value of your business –

“Have you built a lucrative business that will be attractive to potential buyers down the track when it comes time sell?”

These things of course are just scratching the surface on what you need to consider and have in place to achieve optimal security and peace of mind.

coachingclub will help achieve all of this for you and more. As a coachingclub member you will be able to say goodbye to sleepless nights worrying about the future of your business.

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP

OPTIMAL PROFIT

To optimise profit in any Accounting business, you need to first and foremost value what you do and price your services upfront accordingly. Many Accountants suffer from a low sense of self-worth which impacts significantly on their profitability.

In addition to realising the true value of your services, you also need to become as efficient as you possibly can in all areas of your business to drive time down and create new capacity. The new capacity can then be refilled by offering a range of new services to your existing and new clients.

It is a common complaint among business owners that their Accountants' fail to offer them help with services over and above tax and compliance. In reality, tax and compliance are a grudge purchase – something that the government stipulates that business owners must buy. What your clients really want is help with improving profits, improving cash flow, strategies for growth, asset protection, and succession planning. It is services in these key areas that you will be able to offer your clients once efficiencies are in place in your business.

Last, but not least, you need great leverage of people per Partner – more than 10:1.

Based on the results of our high-performing coachingclub members, optimal profit is achieved when you are earning more than 50 per cent EBIT before Partner benefits and less than 30 per cent Partner productivity.

Our coachingclub program provides members with the strategies and guidance to achieve this level of optimal profitability. The real, unmatched beauty of coachingclub is the combination of resources, accountability, constant support from your Coaches and peers and sharing among members, that makes your journey to prosperity so much faster and easier.

📌 **Don't believe us? Read the comments from some of our members...**

"The coachingclub has assisted us to implement 'best practice' systems and procedures, create capacity we never knew existed, and identify and implement growth strategies that have greatly improved the profitability of our business. Our average hourly rate has increased from \$125 to \$275 per hour, we have gone from 6 per cent write-offs to 7 per cent write-ons, increased net profit before Partners salaries by 85 per cent in 12 months and decreased productivity of Partners from 75 per cent to 35 per cent (yes, that is an achievement!). We value being accountable to our Coach and the group, drawing on experiences, ideas, knowledge and material from other firms and assisting other firms gives me a great sense of satisfaction."

Sean Loader - Business Manager
HAS Business Solutions
Alice Springs, Northern Territory, Australia

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP



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TEAM EXCELLENCE

What do you think is better – a team of champions or a championship team?

A championship team will outperform a team of champions every time. So, what makes a championship team and how do you create one?

You know you have a championship team when your team members are ecstatic about being at work and you are seen as an employer of choice with others constantly seeking to work for your firm.

A championship team is motivated and dedicated to achieving the common purpose of the business. They work effectively together, contribute more and have great enthusiasm for what they do. In short, a championship team has the right people, doing the right things. They know what to do, they know how to do it and they operate in an environment conducive to success.

Whether you are looking to employ new team members or have challenges with current ones, there are ten key characteristics that you need to consider (and then act on) to build a high-performing, championship team:

- 1 Common purpose
- 2 Values and standards
- 3 Goal alignment
- 4 Roles, responsibilities and priorities
- 5 Open communication
- 6 Participation and support
- 7 Power plan of action
- 8 Powerful systems implementation
- 9 Risk taking and innovation
- 10 Celebration

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP

If you are thinking, 'Easier said than done!' you are not alone! It is a challenge every business faces but it also does not have to be hard.

We recognise that your team is your biggest investment and as such, we provide our coachingclub firms with the training programs and strategies to assist in building a championship team and in the process, a better business.

One of the most valuable tools is the online Nixon Community where anyone from the coachingclub community can access resources and post questions to find out what other firms are doing to create a culture of success. You can also find out about initiatives that have not worked for others to save you making the same mistakes.

- ① **Keep reading to find out more about what being a member of coachingclub could achieve for you...**



TROY WINK

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"Just one idea implemented from our involvement in the Nixon Advantage coachingclub has returned our investment in full; and will continue to do so year after year. Nixon Advantage keeps our business at the cutting edge of the profession whilst other firms continue to 'practice'. It has even bought our team closer together as we strive towards a common goal. We also use our involvement in the coachingclub in our recruitment process to display that we are and will continue to be proactive."

Troy Wink - Partner
VBD Chartered Accountants
Charlestown, New South Wales, Australia

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP

“Our range of service offerings set us apart from other Accounting firms. We are able to offer our clients solutions to their problems – whether they just need compliance work or intense one-on-one coaching to improve their business, we can offer them business solutions.”

Tina Zawila - Director & CEO
Sothertons
Gladstone, Queensland, Australia

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outcome five

CLIENT DELIGHT

As part of our coachingclub program, we ask our members a simple question - the answer they each give is a direct reflection of the health and sustainability of their business.

Let me ask you the same question:

“What are you doing to delight, or more specifically, really create a ‘WOW’ kind of experience for your clients?”

Important question for all Accounting firms – here is why...

If firms are not proactive with their clients, then their clients’ needs are not being met. That means the firms’ fee per client is lower than it needs to be.

Worse still, there is a fair chance that some of those clients will leave if a competing firm offers to do a better job at looking after their needs.

An August 2009 study by Bay Street Group (www.baystreetgroup.com), a New York based organisation providing custom research for the professional tax, accounting and finance community, found that business owners are likely to

change Accountants for the following key reasons (the 684 participants in the study were asked to select all that applied):

- Poor client service and attentiveness (60 per cent of participants would consider leaving for this reason)
- Affordability – price and fees (52 per cent)
- A requirement for new or different services (36 per cent)
- Existing firm not proactive enough (36 per cent)
- Bad personal chemistry (32 per cent)

It follows that if Business Owners would leave their existing Accountant for one or more of these reasons, then they would be looking for a potential new Accountant to display these same traits.

...but

...if you are being proactive with your clients by offering them a higher level of service and a wider range of services that add significant value to their businesses - their businesses will improve dramatically and they will be thrilled with the outcome.

As a result, your word-of-mouth sales will also increase dramatically.

Not only that, your clients will gladly pay you higher (often much higher) fees, too.

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP

In other words, delighted clients equal much healthier results for your firm. Members of our coachingclub receive all the skills, tools, know-how and support to produce great results for their clients and for their firms. The results speak for themselves, Keiran Mulhall of Griffin Hancock and Moffitt in Rockhampton who said...

“Every Accountant needs to experience coachingclub. More importantly, every business owner needs their Accountant to experience coachingclub. Rob and his team have provided us with the resources and knowledge (essentially a blueprint) to enable us to provide fantastic client service, which unfortunately is rare as most Accounting firms struggle just to cope with compliance workloads, let alone service clients other needs. This fantastic client service has led to a win-win situation for all stakeholders in our business (clients, staff, Partners and our families). What more could you ask for!”



TINA ZAWILA

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To sum up: Delighted clients = more word of mouth + more repeat business + higher fees + lower attrition rates + lower write-offs+ reduced debtor days = better results for the client + higher profits + happier life for you, your clients and your people.

- ① As a member of coachingclub you get all the support and know-how you need to achieve this and so much more. Keep reading to find out more about the positive impact coachingclub could have on you and your firm.



choose your **direction**

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP



SEAN LOADER

PERSONAL EXCELLENCE

Now here is a bold question for you...

“Are you living on purpose and in alignment with your values?”

Be honest with yourself! To answer ‘yes’ to that question means that you are on track to exploit your full potential. You have a clear direction for your life. You have high self-esteem and are very focused and disciplined. You have a very high level of personal happiness and are constantly undertaking initiatives to grow and develop. You operate with the highest ethics, courage and conviction. You are passionate about what you do and at the end of it all you will leave a long lasting legacy.

Sound like you? If yes, great! If not, we can help you get out of the rut and on your way to ‘personal excellence’. You no longer need to be content with mediocre when with some expert guidance you can clock up some ‘personal bests’!

This is what Sean Loader, Business Manager at HAS Business Solutions, had to say about achieving personal excellence...

“...I now realise that there is a bigger purpose to being in business....I need three things to be in existence. 1) To have our clients achieving more than they ever thought possible, 2) to have our employees converting their dreams into reality and 3) the ability for the business to invest back into the local community. That is my ambition and my definition of success”.

The purpose behind our coachingclub program is to help you be the best you can be. Our expert Coaches and your fellow coachingclub members will provide you with the know-how to allow you to reach a level of success you never thought possible.

① [Keep reading to find out more about what coachingclub can do for you...](#)

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outcome **six**

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP

OPTIMAL REVENUE GROWTH

To proactively grow an Accounting business by more than 20 per cent per annum (organic growth without mergers or acquisitions), you need activity based marketing, consultative sales skills, new services, great people, a broad range of services, a solid brand and the ability to capitalise on new opportunities. Unfortunately, many Accountants take the reactive approach to growth by simply putting up charge rates every year and accepting a few new clients. The reactive method is not only disadvantaging your business, but also your client's businesses.

You see, by failing to actively market your services and use consultative sales skills, your clients and potential clients will not be aware of what you can really do for them. To assume that your clients and prospects know about all the services you provide is doing them a disservice because in reality, it is more than likely that they do not know, after all they are not Accountants. Marketing and consultative selling are usually words shunned by Accounting professionals, however these terms are simply a method of providing good customer service. Selling a service is essentially uncovering a problem that the client has and offering a solution. In order for your clients to know that you can offer a solution, they firstly need to know about your range of services.

As mentioned in a previous page on achieving optimal profit, it is essential that you offer services over and above tax and compliance. It is not only in your best interests, it is also your responsibility as 'the trusted adviser' to uncover the additional services that your clients need by visiting with them regularly and getting to know their businesses and their goals (both personal and business).

The coachingclub program will provide you with the skills and advice to achieve optimal revenue growth. We have specifically designed resources to teach you consultative sales skills and the practical know-how you need in order to service your clients needs much more effectively and in turn grow your revenue. It is a win-win – not only will you see your business grow; your clients businesses will grow with you.

Steve Sudbury, Sudburys Limited, Whangarei NZ has grown his firm by 45 per cent with innovative marketing strategy and business development work.

Greg Valentine and Troy Wink, VBD Chartered Accountants, Charlestown NSW, increased revenue by 41 per cent after joining coachingclub.

8 KEY OUTCOMES OF COACHINGCLUB MEMBERSHIP

ULTIMATE LIFESTYLE

We have all dreamed about what our ultimate life would look like. What do you dream of for yourself, your family, your friends, and your team?

Unfortunately, most people do not live out their ultimate life, with these dreams seeming far too distant and too hard to reach.

What is standing in your way of turning these dreams into reality? We often hear things like lack of finance due to low profitability and cash flow issues, or there may be adequate profitability in the business but a demanding work schedule meaning time to do the things you really want to be doing is scarce, inadequate systems in place resulting in the business being reliant on key people (you) and being unable to function effectively without them, a team that struggles to work cohesively together causing conflict, inefficiencies and an unpleasant working environment, disputes between stakeholders about the direction of where the business is heading and the list goes on... How many of these are true for you?

It is time to stop letting these things stop you from living out your ultimate lifestyle. You only have one shot at life, so start making the most of it. coachingclub will help you to build a highly successful business that will allow you to do what you want, when you want to and with whom you want. After all, at Nixon Advantage we realise that real wealth is discretionary time – waking up when your eyes wake up and then doing what you want to do (with whom you want) and having the ability to buy what you want, when you want. It all sounds too good to be true, but we assure you it is not - you too can live the dream!

This is some feedback from a coachingclub member about the positive impact that coachingclub has had on their lives...

“coachingclub has changed us from Accountants to businessmen and turned our firm from a practice into a business. The short term financial benefits of joining coachingclub have been enormous. The long term benefits will be life changing.” Eddie Taylor - Partner, Shearer & Elliss, Unley, South Australia

① Keep reading to find out more benefits of the coachingclub program...



EDDIE TAYLOR

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outcome eight

THE NUTS AND BOLTS OF COACHINGCLUB

Each **coachingclub** has a maximum of eight like-minded, yet non-competing firms (one or two senior people from each firm) who meet quarterly, share ideas and strategies, learn from each other and most importantly, are accountable to each other. **coachingclub** members support each other with new projects and initiatives in areas of recruitment, efficiency, high impact marketing and many more.

You will be assigned an experienced and professional Coach who will act as the 'chairperson' of your group. You will have access to a vast range of tools and resources and most importantly, you will be held accountable for your actions and KPI improvement. After all, committing to new initiatives is great, but that is not where the real power of **coachingclub** lies. It lies in the implementation. The **coachingclub** program has a unique, proprietary way of ensuring action happens within your firm to guarantee results materialise.

At every meeting, you will learn new ideas and set new goals. You will also have access to a network of 450+ other Partners of Accounting businesses who are already members. Stop reinventing the wheel – there are others who have already done what you want to do!

No matter where you are located, no matter what size your firm is, there is a **coachingclub** that suits your firm perfectly. Not only are **coachingclub** participants matched with other similar firms, we also have three levels of **coachingclub** based on the growth stage of your business. You will progress through the levels as you achieve the specified outcomes of each level.



HOW IT WORKS

No matter where you are located, no matter what size your firm is, there is a coachingclub that suits your firm perfectly. Not only are coachingclub participants matched with other similar firms, we also have a mentor program and three levels of coachingclub based on the growth stage your business is at.

MENTOR PROGRAM – BUILDING YOUR RESOURCES TO HELP YOU GET TO COACHINGCLUB:

- You have experienced all sorts of issues and problems.
- You know there is a better way – have found it at Nixon Coaching – but need help to get the ball rolling.

1 PERFORMANCE COACHINGCLUB - GETTING BETTER WITH WHAT YOU HAVE GOT:

- You are now on top of your Work In Progress (WIP).
- Significantly reduced your debtors.
- Write-offs have become write-ons.
- Vastly enhanced productivity management.
- Improved average hourly rate.
- You understand and are focused on your Key Performance Indicators (KPIs).
- Increased profitability.

2 ACCELERATOR COACHINGCLUB - CREATING CAPACITY:

- Significant improvements in your KPIs such that your firm rates extremely highly against industry benchmarks.
- Your leadership and change management is more significant in your firm's development.
- Your firm has the confidence and competence to deliver several non-compliance services which add real value to clients.
- You have created excess capacity, invaluable for responding to new opportunities generated by a consistent marketing program.
- Profits are beyond industry benchmarks.
- Partner productivity is much lower, Partner time valued more highly.
- Partners have a much greater.

3 MASTERCLASS COACHINGCLUB - GROWING YOUR BUSINESS:

- Not content with being industry best practice, you have set fresh goals and vision to take your firm beyond what you previously thought possible for the accounting profession.
- You understand and competently use value pricing in your business.
- To achieve your vision, you are making major strategic moves e.g. large acquisition, new division, multiple offices.
- Implemented profit share or equity participation arrangement with team members.
- Providing a superior client experience.
- Partners are now highly accomplished business people and apply a new level of thinking to your business and what you want to achieve.

WE GUARANTEE RESULTS

We know your Accounting firm will experience tremendous profit improvement as a **coachingclub** member. In fact, we are so confident, we are guaranteeing it in writing.

We guarantee that you will experience at least a three times return on your **coachingclub** fees investment in the first 12 months of membership when you implement everything that you commit to. If you do not we will refund your investment in full.





“Since joining coachingclub ^{10 months ago we have} eliminated write-offs completely - they dropped from 10 per cent two years ago to 2 per cent in the last financial year (zero since coachingclub started but a hangover from the first six months of that year). In the first three months of this financial year we have write ups of over 10 per cent. So coachingclub has added nearly \$300,000 to my bottom line already! I guess that is a 10X return on investment.”

MEET YOUR COACHES



ROB NIXON

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COLIN DUNN



DEAN MARINAC



SCOTT CHARLTON



JULIENNE BARTON



MATT SCHLYDER

ROB NIXON

Rob Nixon launched **Nixon Advantage** (formally robnixon Pty Ltd) in May 1994. Since **Nixon Advantage** inception, Rob has exclusively focussed on helping Accountants improve their financial position. He...

- Has undertaken extensive research on how the profession works (or does not) - dating back to 1964.
- Has interviewed 1,033 clients on behalf of 129 Accounting firms on what they want from their Accountant.
- Has delivered speeches, workshops and seminars at more than 1,100 Accounting industry events in seven countries.
- Has written countless articles on how high performing Accounting firms operate.
- Has benchmarked more than 1,000 firms against each other and authored or co-authored four leading benchmarking reports.
- Has developed products, methodologies and leading training programs in four separate businesses that still operate successfully today.

Rob is the leading worldwide Accounting industry expert. He knows why Accounting firms work, why they do not and what needs to happen for them to work more efficiently and profitably.

EMAIL: ROB.NIXON@NIXONADVANTAGE.COM

COLIN DUNN

BA(Hons), ACA

Colin joined the **Nixon Advantage** team in January 2008. He is a Chartered Accountant with 20 years' experience in helping Accountants develop and implement strategies to build better businesses. He...

- Spent 10 years in one of the fastest growing Accounting businesses in the UK.
- Lead a project in that business to set-up and launch a Business Consulting Division.
- Trained Directors and Team members in that business to raise awareness of the new division and develop skills.
- Lead consulting assignments with business clients and worked on business growth and marketing engagements.
- Spent the last 10 years training, coaching and consulting to Accounting firms, both in the UK and, since 2002, in Australia.
- Has delivered speeches, workshops and seminars in the Accounting industries in Australia, New Zealand, UK, US and Ireland.
- Has developed content, products and systems for Accountants, including the industry leading, web based marketing and client development solution, TRUST.
- Most recently, has acted as a Coach to a range of Accounting businesses right around Australia.

Colin is passionate about helping turn Accounting practices into Accounting businesses.

EMAIL: COLIN.DUNN@NIXONADVANTAGE.COM

DEAN MARINAC

B.Bus., Grad.Dip. El.

Dean joined the **Nixon Advantage** team in September 2009. Dean's experience spans a number of industries including tourism, hospitality, finance, accounting, employment, manufacturing, production, and sales. With an ability to see the view from the 'balcony' then dive onto the 'dance floor' for a closer look, Dean uses his energy, enthusiasm and wide knowledge to get to the heart of any challenge or opportunity.

Dean has held a number of strategic roles requiring him to build and grow businesses through sales. His experience in sales processes that work and large scale commercial tendering has seen him pitch to companies including Redland Shire Council, Pacific Dunlop, Pacific Brands, Linfox, Shell, Glaxo Wellcome, Toll Holdings Ltd, and Visy Recycling and win! Dean's commitment to the small to medium business sector is demonstrated through an achievement in late 2007 when he secured \$450,000 in Federal Government funding to establish a training program for small to medium businesses under AusIndustry's Building Entrepreneurship in Small Business initiative. Dean continues to support business initiatives and is involved with the Queensland Government's initiative 'Jobs Assist' providing

MEET YOUR COACHES

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funding to business owners to build strong plans and actions to grow, develop, and enhance their businesses.

Dean has practical experience in project management delivering numerous solutions built to specification, on time, and on budget. He has managed teams of up to thirtytwo staff covering all facets of performance management, development, process improvement, quality, timely production, and meeting daily targets. Dean has also led a team responsible for the staff engagement of more than 300 employees across an entire division of one of Australia's leading financial institutions.

In his role as a Management Information Systems Manager within the banking industry, Dean delivered a number of outcomes including a balanced scorecard reporting environment for Senior Management, and a sales reporting application covering 75 sales people spanning Australia and New Zealand. Dean knows how critical it is to closely monitor and manage the key success factors in any business!

During his work in the Airline industry, Dean honed his skills in the areas of customer service, marketing research, customer

strategy, and customer relations. Customer value is often underestimated and is a fantastic source of opportunity to grow a business.

Business planning, marketing planning, training, coaching, and strategic facilitation continue to be Dean's key activities with a strong focus on innovation. He has worked with large groups of Senior Management, front-line teams, and even customers to solve problems and implement new ideas. Dean continues to work with Accounting firms across Australia and New Zealand in improving their profitability, their cash flow, and growth and 'supercharging' their firms and understands the pressures and challenges of making that happen. He sees Accounting as "the best profession to help small businesses become great!"

Dean is also a highly sought after speaker regularly presenting to large groups of business owners all over Australia and New Zealand. More than 6,000 have heard Dean's message on how to take their business to the next level in the last 18 months alone!

EMAIL: DEAN.MARINAC@NIXONADVANTAGE.COM

SCOTT CHARLTON

BCom, GradCert FinPlan, MBA, FCA, AFAIM

Scott joined the **Nixon Advantage** team in December 2008. His role is to ensure our Clients have a great experience with their coaching and ultimately to see real results in their firms. Whilst a Chartered Accountant in business, he...

- Successfully introduced business coaching services to his clients.
- Provided the initial Australian content for the Business Fitness 'How Now' application, based upon the systems and checklists he utilised in his own firm.
- Set-up a successful joint venture company to deliver financial planning services to clients.
- Undertook a fruitful merger of his firm with two other practitioners.
- Was a member of the Institute of Chartered Accountant's panel of Quality Reviewers.
- Delivered workshops around Australia and in New Zealand in the use of a financial analysis software package.

Since leaving his firm eight years ago, he...

- Coached numerous financial planning firms to implement best practice systems and adopt growth strategies.
- Developed a joint venture model for financial planners working with accounting firms and successfully coached planners to implement this across a range of situations.

JULIENNE BARTON

B.Ec.(Hons) CA

- Has presented papers to both Accountants and Financial Planners on working together for mutual benefit.
- Has been State Manager for two Financial Planning groups undergoing significant growth.
- And has been coaching Accounting firms in the Nixon Advantage **coachingclub**

A natural facilitator and a very experienced Business Coach, Scott is in his element helping our Clients improve their performance and financial position.

EMAIL: SCOTT.CHARLTON@NIXONADVANTAGE.COM

Julienne joined the **Nixon Advantage** team in June 2009. In both leadership and business coaching roles, Julienne has a proven track record and considerable experience in successfully mentoring and coaching Senior Management. She is renowned for her ability to motivate and manage people, to drive accountability and make it happen.

She brings a positive attitude, energy and drive, a strong level of business acumen, an outcomes focus and a diversity of business skills, including leadership and management, strategic planning and implementation, facilitation, human resource management, integrated software solutions and performance reporting. She prides herself in getting the best out of people, individually and in a team environment.

Julienne has over 30 years of professional experience having:

- 9 years experience as a Chartered Accountant with the then Price Waterhouse, principally in their Business Advisory Services area, to a Senior Manager level.
- 10 years experience as Managing Director of a Wholesale and Retail business, achieving significant growth and successes throughout this period.

- 13 years experience in Business and Executive Coaching and Consulting for key decision makers of businesses from a diverse range of industries, including accounting, financial planning and a variety of other professional services firms, IT, manufacturing, wholesale and retail, for firms throughout Australia and overseas in USA, New Zealand and Japan.

Julienne is passionate about enabling businesses and their people tap their potential, to be the best they can be, and she brings substantial hands-on experience and business acumen, built on a strong professional background.

EMAIL: JULIENNE.BARTON@NIXONADVANTAGE.COM

MEET YOUR COACHES

MATT SCHLYDER

B.Bus., FCA, Dip. Fin. Serv.

Matt joined the **Nixon Advantage** team in April 2009. Matt is a Chartered Accountant with 23 years experience and a Partner with Elliotts since 1996. Matt brings a wealth of knowledge to the **coachingclub** program. He...

- Is responsible for implementation of all business strategy in his capacity as the CEO of Elliotts.
- Has been a long term supporter of **coachingclub**. His firm Elliotts has been in **coachingclub** virtually from inception. Currently, Elliotts is a member of our masterclass level of coaching.
- Has a deep appreciation and understanding of key **coachingclub** concepts such as fee proposals, value pricing and assisting clients beyond their compliance requirements.
- Provides the perspective of a current practitioner to the program. The suggestions and recommendations Matt makes in his coaching relate directly to what he has found to work in his own firm.
- Has frequently given his time to speak with other **coachingclub** members and firms interested in joining **coachingclub**.
- Presented a fascinating case study on value pricing at our 2009 annual conference.

An astute observer of business issues, Matt can be relied upon to provide well considered views on current issues relating to the Accounting industry. A very caring and considerate person, he embodies the spirit of **coachingclub** by readily sharing his knowledge and experience with the **coachingclub** community.

EMAIL: MATT.SCHLYDER@NIXONADVANTAGE.COM

MEMBERSHIP INCLUSIONS

The Nixon Advantage coachingclub program offers a new level of support for you and your team. Whilst focusing on the seven key benefits, your membership also includes:

- Strategy meetings
- coachingclub meetings
- Momentum conference calls
- Ad-hoc accountability calls
- Benchmarking and results tracking
- A discounted rate at learning and development programs
- Online Nixon Community access
- An extensive product library plus free upgrades
- Unrestricted access to your Coach via phone and email
- Monthly newsletter
- Performance recognition

STRATEGY MEETING (TELEPHONE CALL WITH WEB ACCESS)

To kick start your membership your Coach will hold a one-on-one session with you for about an hour on key areas of focus. You will be required to complete a questionnaire and during the call the 'Proactive Success System' is completed, which will be the primary planning and tracking device. Your Coach will help you to set targets for the year ahead and set some strategy around these targets. This strategy meeting is done by phone and web.

COACHINGCLUB MEETINGS (FACE-TO-FACE)

Every 90 days, each coachingclub group meets face-to-face either at the **Nixon Advantage** office in Brisbane. Most firms designate one or two people to attend every meeting. Each group is chaired by their assigned Coach. It is at these meetings where firms set projects and are held accountable to those projects and targets. A team dinner is also held either the night before or after the coachingclub meetings, as a networking social event. The team dinner is organised by our Client Managers.

MOMENTUM CONFERENCE CALLS

Every 90 days (between face-to-face meetings) you will participate in a group conference call. These momentum calls allow firms to hear how successfully (or not) the projects are being implemented. These calls typically take 1.5 to 2 hours.

AD-HOC ACCOUNTABILITY CALLS

From time-to-time, you will be contacted by our Coaching Program Manager to check you are on track to achieve your targets and to offer support with any challenges you are experiencing which may be preventing you from reaching your goals.

BENCHMARKING AND RESULTS TRACKING

To help you to better understand exactly how your business is performing in terms of productivity, average hourly rate, WIP days, write-ons/offers, debtor days, expenses and overall profitability we have developed a very unique reporting and monitoring tool. The Proactive Success System provides, on a monthly basis, immediate feedback on your progress as well as forming the basis of annual benchmarking.

On the 15th of each month your results from the previous month are submitted to coachingclub support at **Nixon Advantage**. The Proactive Success System delivers back to you an impressive digital dashboard and performance graphs.

MEMBERSHIP INCLUSIONS

“Our eyes have been truly opened in coachingclub and we would not have made any of the changes that we needed to without your thoughts and guidance and our other various coachingclub members experiences.”

Tony McDowell - Director
Abbott Solutions
Mt Lawley, Western Australia

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This tracking process helps you enormously in gaining real clarity in moving your business forward. You will be able to see at a glance how you are tracking against your annual plan and where your performance needs to be improved.

LEARNING AND DEVELOPMENT PROGRAMS

coachingclub members enjoy a special discounted rate to attend various **Nixon Advantage** workshops and seminars held around Australia and New Zealand throughout the year.

PERFORMANCE RECOGNITION

Your membership of coachingclub ensures that you remain abreast of the best, most effective processes employed in Accounting firms, that is why on an annual basis we celebrate outstanding achievements within the **coachingclub** community. For **coachingclub** members the annual Conference is an impressive highlight of the year. It is an opportunity to recognise and learn from the highest performers in the Accounting profession.

NIXON COMMUNITY ONLINE

The **Nixon Community** has been developed to enable our **coachingclub** members to network more effectively and more regularly – in fact, everyday at any time of day.

It is a discussion board where you can ask others in the **coachingclub** community for advice, share experiences, help each other with implementing projects and debate current issues. Chances are the things you want to do have been done before, so the online Nixon Community is the perfect place to find out insights from others and save yourself some pain!



“...coachingclub and all the resources associated with it gave me the confidence, self respect and belief that I too could achieve exceptional financial results”.

Evan Bulmer - Sole Practitioner
Evan Bulmer & Associates
Hendon, South Australia

Our Coaches are regular contributors to the online Nixon Community too. They are perfectly placed to facilitate the sharing of insights, based on their close working knowledge of what is working in **coachingclub** firms.

On the Nixon Community site, you will find an abundance of information and IP covering topics such as:

- Marketing
- Sales
- Pricing
- Efficiency
- People
- Technology
- Services
- Self Development
- Workshops and Events
- Financial Planning

And it keeps growing everyday...

MONTHLY NEWSLETTER

On the first working day of every month, you will receive an electronic coachingclub newsletter. This newsletter contains updates, tips from our coaches, information on upcoming events, member success stories, announcements and general information about new products, changes to the website or forum.

UNRESTRICTED ACCESS TO YOUR COACH

We know the importance of timely advice in achieving business goals, that is why our **coachingclub** members are welcome to call upon our Coaches for advice as often as they need via phone and email.

It is remarkable how often a business issue can be solved simply by sharing it with an informal, experienced third party. Sometimes just knowing that you have a Coach committed to your success can be encouraging! This invaluable resource is available to you as part of your coachingclub membership at no additional cost.

WHERE TO FROM HERE

coachingclub is not for everyone, but for a select group of Principals and their teams, the **coachingclub** program represents a powerful new direction for leadership, advice, and competitive strategies.

Our Initial Strategy Session process is designed to ensure that there is a great 'fit' between your goals and direction and what we are out to achieve.

One of our expert Performance Advisors will guide you through this process and help you to determine the best course of action to help you to achieve your goals.

Whether or not you decide **coachingclub** is right for you, this experience and process in itself will provide valuable insight into your business where you can identify how to transform your firm into a highly profitable, commercial and sought after business.

In you Initial Strategy Session, your Performance Advisor will help you:

- Revisit your bigger picture objectives such as maximised cash flow, optimal business security, optimal profitability, team excellence, client delight, personal excellence, maximised growth, and your ultimate lifestyle;
- Objectively look at you and your firm's current reality;
- Measure the gaps between your objectives and current position; then
- Look at what to do and 'how to' fill these gaps and to what degree to make your plans a reality.

The real value to you will be a refreshing and objective set of goals and clarity about your next steps. If **coachingclub** appears to be a good fit for your firm, we will explain how it works and invite you to join.

Simply phone us on
1300 762 690 [within Australia]
+ 61 7 3607 6600 [overseas]

or email us at performance@nixonadvantage.com and we will arrange your complimentary Initial Strategy Session. There are no costs, risk or obligation associated with this consultation; it is purely a discussion over the phone with you and your key stakeholders to assess the best path for your business. The biggest risk you could take is to be complacent and take no action at all. Contact us today - we are here to help you succeed!

"I think if you are serious about operating your Accounting practice as a business, then you really need to be doing things that are able to allow you to focus on making that business more profitable and enjoyable. I think you should just make the decision [to join coachingclub] because it has been valuable for us, it has accelerated a lot of our thinking, and I know that we would not be in the position that we are - even in this short period of time - had we not become involved formally with Nixon Advantage.

I think realistically, if firms really want to change methodology in terms of really changing the way they think about their business, the way they operate their business, and the way they invest their time in their business, then the Nixon Advantage coachingclub model is very powerful.

The face-to-face meetings were an unexpected benefit, from our perspective. Yes, it does require a bit of time to get out of the office, but what it does is it forces you then to focus on your business, share ideas, gain information, and more importantly, go and implement. I think a lot of challenges for a lot of businesses is that they are not held accountable to implement actions within their business, whereas this framework allows you and forces you in a very good way, to implement and if you are not implementing, you will not change.

So, I would encourage a lot of practices to seriously consider joining coachingclub because the benefits are there."

Chris Mandzufas - Director
Brentnalls WA
Mount Hawthorn, Western Australia

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"Where we were when we joined coachingclub in November 2007 is a shadow of ourselves today. Our goal upon entry was that we were in need of a major makeover. I believe that we have had the makeover and are now in the process of changing the way our body looks. Our eyes have been truly opened in coachingclub and we would not have made any of the changes that we needed to without your thoughts and guidance and our other various coachingclub members experiences."

Tony McDowell - Director
Abbott Solutions
Mt Lawley, Western Australia



make an **impact**

CONSULTING

There is no doubt that coachingclub is the most powerful thing you can do for accountability and implementation.

Should you decide that coachingclub is not for your firm just yet; the next best thing is consulting and training.

We will match you with a Coach who best fits your firm and together we will customise a program for you, completely tailored to your firm's key issues.

We will take you through a structured process where we will identify your areas for improvement and help you identify where your biggest opportunities are. You will discover what is possible for your firm and we will show you how to achieve it.

Customised consulting can be appropriate in instances such as...

- Dissolution of a partnership
- Facilitation of an inter-generational transfer of business
- There is significant disagreement amongst the Partners regarding the firm's strategic direction
- To facilitate the retirement of a Partner

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The initial discussion we have with you is complimentary and obligation-free. To find out more contact us on 1300 690 762 [within Australia], + 61 7 3607 6600 [overseas] or email performance@nixonadvantage.com and we will get in touch immediately.

WORKSHOPS

TEAM TRAINING

You already know that your largest investment is your team. You also know the success of your business relies on your team.

Are you confident you are getting a great return on investment and have a fully engaged and energised team who care as much about your business as you do?

Our **coachingclub** firms realise pretty early on that to achieve the firm's full potential, it is essential that the team has completely 'bought in' to the vision and are right behind the business goals and initiatives.

We offer a number of workshops that we can customise and present for your entire team or just your leadership team.

The workshops cover a range of areas, tailored to what you most need. Here is an outline of what you can expect to cover:

- What it means to be a high-performing Accounting business
- How to run a better Accounting business
- Raising the bar to what is possible
- Aligning your team to achieve high performance
- How to create capacity without hiring more Accountants
- Putting a plan in place to increase profit per Partner
- Getting your team wholly committed and excited about what you can achieve

The goal of this workshop is to demystify the process of achieving brilliant results in your business. You will walk away with a structured framework and greater certainty on 'HOW' to move forward at an accelerated pace.

All workshops are designed to both educate and excite your team to all the possibilities. You will find that your team will be more engaged and will come up with most of the ideas. Firms have been pleasantly surprised when their teams set higher targets and after just one day, are more committed and motivated than ever before – even the tough ones! The results speak for themselves.

HERE IS WHAT SOME FIRMS HAVE FOUND AFTER RUNNING THESE WORKSHOPS:

"Rob's presentation skills and enthusiasm are second to none and his ability to motivate and change the mindset of our team has been remarkable."

Eddie Taylor, Shearer & Elliss, Unley South Australia

"We had Rob come to Shepparton for a day in early June 2009 to 'supercharge' our business – leadership team in the morning and the whole team in the afternoon. Rob provided us with accountability to put the action plans in place that we have been procrastinating on for months.

The ideas and input from all staff was amazing, and we have come back into the office with a new vitality to increase our efficiency. Our staff can now see why we have been raving on about him for the last 12 months! Perhaps most importantly, we have come back with ideas and processes to increase the satisfaction of the most important asset of our business - our clients. A fantastic day Rob, and thank you for the insights and challenges that we needed.”
Michelle Collins CA, Metzke & Allen, Shepparton, Victoria, Australia

“Most of us usually find the ‘STOP’ button fairly easily. The Nixon® Advantage ‘Supercharge Your Accounting Firm’ workshop taught us where to find the ‘ON’ button; and more importantly, how to push it! Ready ... Fire ... Aim! It was an excellent day with outcomes that will positively change the future of our firm.”

Tom O’Reilly, Metzke & Allen, Shepparton, Victoria, Australia

“Rob was truly inspiring and motivational but the day was much more than just that. There were loads of practical strategies and ideas to implement and the team became one to focus on goals for the firm. The KPIs set by the team were certainly above what we would otherwise have set. The day was awesome!”

Rick Henery, May Partners Pty Ltd, Kerang, Victoria, Australia

“It’s given me some great methods to communicate with clients and improve the business.”

Anthony Tait, Badcocks Pty Ltd, Devonport, Tasmania, Australia

“It provided principles which can easily be integrated into an accounting and financial services business.”

Jason Besters, Proview Accounting & Financial Solutions, Moss Vale, New South Wales, Australia

“Given me a process to work with in gaining new clients and/or providing new services to existing clients.”

Simone Davis, Wilson Porter, Sydney, New South Wales, Australia

“WOW – in our ‘Supercharge’ day we were delivered energy, passion, inspiration and ideas to make things really happen in our business. The team now have the confidence to know that there are no boundaries and anything is possible in our business.”

Chris Mandzufas, Brentnalls WA, Mount Hawthorn, Western Australia

① For more information, read further about how to Supercharge Your Accounting firm.

SUPERCARGE YOUR ACCOUNTING FIRM

"There is a lot of 'how to' in this seminar. It pays for itself and challenges you to break to mould".

Peter Saccason
Saccason Bailey

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*"It has confirmed that there are massive opportunities out there. Having the whole team along was tremendously valuable and has got them particularly enthused and reinvigorated".
Thanks!*

Matthew Tol
Matthew Tol & Associates

Unlike any seminar or workshop you have ever been to – this is your chance to learn ideas from around the world on what it means to be a high-performing Accounting firm.

This program is for your whole team – designed to really 'supercharge' your results with techniques, skills, tips and systems to improve your firm and your financial position.

You will learn:

- How you can substantially increase your profits and cash flow
- How you can find and retain people
- How to correctly interview an existing or new client
- How you can price your services – whilst eliminating write-offs
- How you can value price projects
- How you can create a championship team
- How you can improve workflow
- How you can reduce debtors
- How you can systemise your business
- How you can become much more efficient

It is a content rich workshop and you will have the opportunity to ask questions, interact and brainstorm ideas for your firm. In this one day program we reveal secrets that normally only our coaching clients receive.

This is a one-day 'no punches pulled' program. It is based on 15 years of working with thousands of firms around the world on what works and what does not. Discover this and much more...

- Learn and emulate Leadership Principles adopted by the top industry performers
- ...Participate in an interesting exercise that demonstrates the effect of these principles on profits
- What does a high-performing business look like?
- ...Discover the very strategies a high-performing business employs to drive hourly rates up, increase client numbers and WIP days, and drive write-offs into write-ons
- Identify systems to streamline your operations, free up labour and minimise rework

- Increase your capacity by as much as two hours per person per day without increasing your team numbers. We will show you 13 workflow techniques that enable you to do that easily.
- Finding and keeping the right people (even with the ‘so called’ talent war that is out there) – find out the secrets to identifying who will be the star performers for your business, and find out how to bring out the best in your people...effortlessly.

Plus specific case studies, benchmarks, action steps, a whole bunch of brainstorming with your own team and much, much more...

“Our team was, I would say, sceptical of the day. Not sure what was in store, is this another waste of time, are we going to get anything out of it. At the end of the session we went away feeling charged and inspired about the business we are working in and how we can play a part in it. The afternoon brought it all together for the partners of the business and gave real direction and emphasised the fact of not getting bogged down in the little things, to keep working on the big picture and bringing the little things in to it”.

Peter Lines, XPAL, Walkerville, South Australia

“It has confirmed that there are massive opportunities out there. Having the whole team along was tremendously valuable and has got them particularly enthused and reinvigorated.”

Matthew Tol, Matthew Tol & Associates, Victoria, Australia

SUPERCHARGE YOUR MARKETING

We have found that most Accountants need help with marketing. They just do not realise it until they work with us and run out of work!

You need to understand the many options available to you to get quality new clients and really 'supercharge' your results in this area.

The Nixon Advantage Coaches are highly regarded as experts in this field. Rob Nixon himself has personally implemented every marketing strategy there is. This program helps you formulate a strong plan and gives you over 200 ideas, techniques, skills, tips and systems to improve your marketing and ultimately, your financial position.

You will learn:

- How to create ways for clients to experience doing business with your firm
- How to set up a marketing plan and what you need to implement it
- How to create a marketing gravity plan and use a variety of methods to attract new clients
- How to execute effective marketing campaigns
- That you do not need to do it all yourself!

It is a content-rich workshop and you will have the opportunity to ask questions, interact and brainstorm ideas for your firm. In this one day program we reveal secrets that normally only our coaching clients receive.

This is a one-day 'no punches pulled' program. It is based on 15 years of working with thousands of firms around the world on what works and what does not.

Plus specific case studies, benchmarks, action steps, a whole bunch of brainstorming with your own team and much, much more ...

SUPERCHARGE YOUR SALES

Are you happy with your sales process? Are you getting 'A-Class' clients knocking on your door? Would you like to discover the secrets to making sales work in an Accounting firm?

We have found that most Accountants need help with their sales process. It is not a natural skill and takes support and training to develop.

Recently a coachingclub firm employed a full-time sales person (practically unheard of!) and in the first three months brought in over \$600,000 of new business.

A good investment? You bet!

In this program we help you uncover the mystery of selling and help you develop the necessary skills to develop strong relationships with clients to sell more services and better serve them.

We will help you to formulate a strong sales plan and processes to support its implementation. You get access to techniques, skills, tips and systems to really 'supercharge' your sales and ultimately, your financial position.

You will learn:

- How to convert your leads into sales
- How to build your confidence and self esteem around selling
- How to set up a client nurturing program
- How to get your team involved in the process
- How to set up solid processes to ensure greater conversion
- How to hold successful client meetings and follow up
- How to write winning proposals and close the deal

It is a content-rich workshop and you will have the opportunity to ask questions, interact and brainstorm ideas for your firm. In this one day program we reveal secrets that normally only our coaching clients receive.

This is a one-day 'no punches pulled' program. It is based on 15 years of working with thousands of firms around the world on what works and what does not.

Plus specific case studies, benchmarks, action steps, a whole bunch of brainstorming with your own team and much, much more...

SUPERCHARGE YOUR BUSINESS

The Supercharge Your Business workshop is for your clients and potential clients.

This hugely successful program was developed by Rob Nixon as a way for Accounting firms to give added value to their clients and an ideal opportunity to promote their business advisory services and in turn grow their business clients.

This workshop has been delivered with great success to literally hundreds of business people all over the world. The feedback we have received from both Accounting firms and their clients has been nothing short of amazing!

The workshop helps your clients get focused on growing and developing their businesses. It is a four to five-hour workshop where a Nixon Advantage facilitator will run your clients through seven key areas, namely:

- 1 Increasing profits with the current team
- 2 Creating a nurturing, yet high-performance working environment that fosters loyalty within the team
- 3 Winning more new customers easily and more profitably than ever before
- 4 Saying goodbye to crazy hours and stress
- 5 Dramatically improving cash flow
- 6 Understanding key drivers to better manage the business
- 7 Feeling great about the business and enjoying work!

The facilitator will promote your services and how you can work with your clients to achieve these results.

In preparation for the workshop, you will receive a Resource Kit which includes a detailed System Kit containing instructions on everything you need to do, how to do it and when so that you can organise the event with ease. It also provides you with a comprehensive Leader Guide so you can facilitate the program again in the future yourself.

This ground-breaking program will not only create a smorgasbord of work with your current clients, but will also attract a large number of new clients to your firm. This is what Chris Laffey of Leenane Templeton in Newcastle had to say after running the program in July '09...

“The ‘Supercharge Your Business’ workshop you delivered to our clients and guests last night was excellent. The feedback from all the attendees was beyond positive and the event itself has created a load of strong prospects from the non-client guests and plenty of work from the clients who attended. Your common sense and practical approach had most of the attendees scratching their heads and saying ‘Why didn’t I think of that?’ They left the venue with a spring in their step and a determination to change the way they do business. Thanks for making that happen. We’re looking forward to being part of that process with them. As Andrew and I keep telling people (clients and non-clients) - this stuff really works!”

Chris Laffey, Partner, Leenane Templeton, Newcastle, New South Wales, Australia

Here is what some past attendees (clients of Accounting firms) have had to say...

“Full of great ideas, new directions. Much more valuable than I had hoped. Very satisfied, thank you.”

Michael Zaina, Adelaide (Property Development)

“Excellent, useful information. Easy to implement ideas. It made me think about my approach to running my business.”

Angela den Hollander, Melbourne (Marketing & Design)

“It encourages self reflection and business evaluation with excellent strategies for improvement.”

Michelle Lillicrap, Brisbane (Wholesale Distribution)

“Fantastic – has really opened my eyes to how to improve my business. I have never had the information explained so well.”

Renee Foster, Brisbane (Engineering Consultants)

If you would like to explore how this workshop
could work for your firm, please email performance@nixonadvantage.com to express
your interest and we will be in touch immediately.

BUSINESS PERFORMANCE REVIEW

This is a powerful, one-on-one coaching service that will give you the tools and strategies to really supercharge your performance.

The 'Business Performance Review' will assist you in analysing your current performance and will then provide you with detailed recommendations on what you need to do to achieve your goals.

It is a content rich, face-to-face planning / strategy session with the bonus of ongoing coaching. The program is highly customised to focus specifically on the areas most relevant to your business. This may include any or all of the following:

- Revenue growth – strategies to achieve more than 20 per cent per annum organic (excluding mergers and acquisitions) revenue growth through sales and marketing.
- Profit improvement – strategies to achieve more than 50 per cent EBIT before partner benefits whilst driving partner productivity down.
- Maximised cash flow – strategies to achieve less than average of 40 days of 'lock up' (work-in-progress and debtor days combined) throughout the year.
- Improving systems and processes – strategies to achieve seamless succession and how to build exceptional systems.
- Client delight – strategies to receive a quantum amount of unsolicited referrals and testimonials.
- Team excellence – strategies to implement so that your team members are ecstatic about being at work and others constantly want to work for your firm.
- Personal excellence – strategies to achieve your personal goals and aspirations.

Typically the sessions run from 9:00 a.m. to 4:00 p.m. and are presented by one of our top consultants, Dean Marinac.

Before the meeting takes place there is some preparation to do...

- 1 You will fill in a detailed questionnaire and send it to us before the session takes place. This will give us vital information for your session and just filling this in will give you an insight into what you need to do in your firm even before Dean arrives.
- 2 Dean will contact you to double check all the data.
- 3 There will be a team of up to three Coaches looking at your questionnaire and making suggestions. We call this the 'bear pit' where we (some of the coaching team) pull apart the history and give top line solutions to what you need to do to achieve your goals.
- 4 We will then do a full analysis of your current performance (past three years) and then prepare a benchmark report against our clients.
- 5 A detailed PowerPoint presentation will be prepared ready for your meeting.

At the meeting itself you will receive...

- 1 A shareholders (partners or leadership) alignment session. This happens first – we call it the ‘Wheel of Accounting Success’. It will show the main areas (out of eight key areas) you need to focus on in your business.
- 2 A detailed PowerPoint presentation on what you need to do – this includes the benchmarking analysis.
- 3 Honest comments. Dean will not ‘gild the lily’ – he’s going to tell it the way it is. Based on what we did in the ‘bear pit’ exercise, before the meeting Dean will give you advice on specifically what you need to do and how to do it.

After the meeting you will also receive...

- 1 A copy of our sought after monitoring system – the ‘Proactive Success System’. This will keep you on track for the years to come.
- 2 Two copies of our famed ‘Accountants Strategy Map’. This will keep you focused after the program has finished. (Depending on the size of your firm, additional copies may be requested).
- 3 A DVD recording of your session so you can play over and over again.
- 4 Full PowerPoint presentation of what was presented.
- 5 Any template files that were requested or promised will be sent.
- 6 Three ongoing accountability coaching calls over the next 12 months. One phone call every four months to check in on how you are going.
- 7 Ongoing access to Dean for quick hit answers to issues or challenges.

If this is of interest, then please email performance@nixonadvantage.com to organise a direct discussion with Dean to see how applicable it is for you.

“Dean I wish to personally thank you for your enthusiasm, wisdom and dynamic ability to engage my accounting and financial planning teams. The passion in which you delivered your workshop was only eclipsed by the absolute relevance and common sense approach that you took to educate my team.

The feedback that I have received thus far has been nothing but positive and I have already noticed an increased energy and my staff beginning to speak in a ‘different’ language (one very similar to mine!) I believe that we received exceptional value for money from your services and look forward to continuing our relationship into the future!!”
Steve Salvia, Southern Financial Strategies, Riverton, Western Australia

energy



STRATEGIC SUCCESS PLANNING SESSION

If a full consulting or coaching program is too intensive, then consider a one day strategic session that will assess your current position and give you a host of ideas to improve your business. You will be given expert guidance on precisely what you must do to improve your financial position and put you on the right path to long term success.

A Strategic Success Planning Session will assist you in developing a plan to underpin your future success. This session will align the business and personal goals of the key stakeholders in your firm and establish a clear sense of purpose in taking the firm forward. The importance of alignment on the vision amongst the firm's owners and management team cannot be understated, for this creates the energy, which attracts clients and engenders the passion to inspire your team.

Agreement on a set of core values is important too. Every day, you and your team make literally hundreds of decisions, large and small. It's impractical to anticipate all such contingencies, so 'true north' values provide the context in which you can be confident to empower team members to use their initiative.

Strategies must also be developed to address your key challenges and weaknesses. If all your firm is capable of doing is an efficient tax preparation service, you've got nothing to distinguish your firm from your competition.

The Strategic Success Planning process 'drills down' into specific areas of the business such as marketing, team members, systems and succession. For each of these, specific strategies are identified, and are integrated into achieving the overall vision.

A feature of this process is the opportunity for reflection, discussion and refinement. The input of your robnixon facilitator, as an informed outsider, is invaluable at this point to provide additional suggestions, challenge assumptions and ensure clarity. Sharing the almost-final plan with your team allows for feedback, further suggestions and a sense of ownership.

The Strategic Success Planning process is complete when all refinements have been finalised and there is formal 'signing off' on the document and arrangements made to ensure its regular review.

The outcome of this session is a very concise, well considered plan, which literally sets out your business on a single page. This document allows your business to be readily explained and reviewed – a true blue print for long term success.

CLIENT ADVISORY BOARD

Imagine one of your clients sitting down at a luncheon with several other business owners. The subject of Accounting services comes up. What will your client say about you and your firm?

Will it be positive? Will it be negative? Or worse yet, will it be nothing at all? Will your client, instead, be silent, listening carefully to what's being said by others while internally running down a list of comparisons of your firm vs. the other firms being discussed?

It is a given that clients are thinking about you and the service your firm provides. Even if they are not talking about you to other business owners, they are evaluating your firm every time you provide a financial statement, tax return, or other service. They are also evaluating your firm every time you answer the phone, return a call, or send out an invoice or other correspondence.

Ironically, it is often the non-technical aspects of what you do that are noticed most by clients. We know that clients often leave a firm not because the firm was technically incompetent, but because of the way they were treated.

It comes down to the issue of perceived indifference. You know, the little things that communicate to the client that they are not as important to the firm as they think they should be.

What are your firm's areas of perceived indifference? Your phone procedures? Your billing procedures? The way you deliver a financial statement? The amount of contact with your clients? The attitude of a team member? Accessibility? Timeliness?

Whatever your issues of perceived indifference, you owe it to yourself to find out what they are and fix them – now! Every day you wait, you risk losing a client who feels unheard or uncared for.

So, how do you determine your issues? We have found the best way to reveal what those issues are is to ask. Here is the really important part: you must really listen to your clients. They already have the answers and are more than willing to share them.

You need to hold a Client Advisory Board—ASAP!

When you think about it, would it not be better to get your clients talking to you directly about their concerns, frustrations, and desires rather than telling someone else? Of course it is, but the benefits do not just stop there.

Here is the interesting part.

You and your team probably already know much of what your clients' concerns are. It may be that the greatest benefit from the feedback you get at the Client Advisory Board (CAB) will help you set your reengineering priorities.

Based on the intensity level of your client feedback, you will know which issues need to be addressed and in what order.

Beyond that, your team will be motivated more than ever before by the feedback. You see, for the first time, you and your team will be held accountable to a whole new level of client expectation.

This is a day like no other in your business. For many firms it is truly a turning point and the beginning of great things. It is a giant step on a path towards extraordinary service.

This is what one firm had to say after holding a CAB recently –

“For many years now, I have listened intently to the arguments for and against holding a client advisory board with our key clients to find out what they really think of us.

While the idea of knowing how to help someone better really excited me, dealing with the negativity of really knowing what they thought, scared me. So it was very easy to procrastinate and just never get around to putting it together.

Then recently, when the torment of missing out on something great finally got to me, we took the plunge and enlisted the help of Wendy Gleeson through Rob’s office and hosted our first official Skinner Hamilton Client Advisory Board and all I can say is WOW!

What an experience! The clients were from varied industries but the feedback was consistent, constructive and relevant. The clients themselves were amazed that people so different and unrelated in both industry and life could all be experiencing such similar things in their businesses and also within our business...so much so they have asked us to hold the event every 6 months.

The results gave us the confidence to know where we are going right and where we have to go in the future and with the systems we now have in place we will be now able to hold these events on a regular basis”. Jason Skinner, Skinner Hamilton Pty Ltd

- ① Nixon Advantage is now offering this service to Accounting firms. Contact us to enquire about facilitating a Client Advisory Board for your firm – performance@nixonadvantage.com

focus



BUSINESS ASSESSMENT TOOLS

TRUST

TRUST is a web-based marketing and client development system that enables Accounting firms to understand precisely what their clients need. Clients identify their needs by completing online assessments that you assign to them. The responses to the assessments allow **TRUST** to generate a client service plan that identifies potential opportunities for cross-selling and new business in a totally client-focused way.

TRUST is a leading edge solution helping accountants leverage their time to manage workflow and resources in a truly effective way.

WHAT IS TRUST?

ReNew Group's flagship professional selling tool for the accountancy profession, **TRUST**, is a web-based solution that enables accounting firms to understand precisely what clients want from the firm. Clients identify their needs by completing online assessments that you assign to them. The responses to the assessments allow **TRUST** to generate a client service plan to help you plan your workflow for key clients and avoid team burnout and job blow up. The client service plan also identifies potential risks and opportunities with which you may want to help your clients.

TRUST provides a client-centric methodology for identifying both compliance and non-compliance needs. We base our methodology around a proven selling system. As a result, our accounting clients sell more services, better service their clients, generate more profits and create sustainable value.

TRUST

“SBS is a leading firm in the adoption of technology and the implementation of Accounting best practice, so we are always keen to know of and use tools in the pursuit of these aims. Our firm specifically used TRUST with a new client in the Real Estate industry. As a result of that client completing a TRUST assessment, our firm was able to offer a significantly greater range of services to address their needs as identified by TRUST. Additional fees generated were commensurate with the extra services we were in the position to deliver.”

Timothy Munro

Director
Specialised Business Solutions Pty Ltd
(SBS) Brisbane QLD

HOW TO SEAMLESSLY INTEGRATE TRUST INTO YOUR FIRM

- 1** Review your client list and decide which clients you need to give priority and better manage.
- 2** Create **TRUST** assessments relevant to those clients, either based on your own preferences, or simply selected from our pre-designed templates.
- 3** Using the positioning collateral that comes with **TRUST**, your carefully selected key clients are advised of the process you will invite them to go through.
- 4** **TRUST**'s email tracking and reminder system then swings into action; your clients are invited to work through an online assessment at their convenience and independent of you.
- 5** Upon completion of each client's assessment, you immediately receive an email advising you to download their client service plan.
- 6** The client service plan documents your client's responses to the questions and lists any action points that they feel should be addressed.
- 7** You now have an invaluable process to help you plan workflow and identify opportunities – initially without having to invest any time face to face with the client to gather that information.
- 8** Result: significant time savings for your firm and your clients, happy staff, secure clients and opportunities to follow up as required by your clients.

"In a previous role as State Manager of a major Financial Planning dealer group I saw firsthand the power of TRUST for developing professional services and expanding the range of services offered to Clients. I see huge potential for Accounting firms looking to grow to benefit from this leading edge process. TRUST is a great way to identify issues that the Client would like some help with. It therefore helps Accountants enormously because meetings are centred on solving client problems rather than the usual awkwardness of initial meetings. TRUST is equally applicable to prospects and existing Clients and in my opinion should form a key part of every Accounting firm's Marketing program."

Scott Charlton
Director of Coaching
Nixon Advantage Pty Ltd

ReNew Group's CEO Colin Dunn says,

"Firms need to leverage technology. Many firms have invested in products such as ProfitOptimiser and WinForecast. But are we using them to full effect? Accounts are the greatest exponents of 'shelfware' to the extent that, when TRUST is introduced at industry conferences, the typical response we receive from Accountants is that our product is great – but they don't know how they'd cope with all the additional work TRUST would generate for their firms. If you are serious about growth, now is a great time to invest in surplus capacity (cherry pick the best of the talent being released by the Big 4) and identify opportunities to fill that capacity using TRUST".

Matt Schlyder, Managing Partner of Elliotts in Brisbane says,

"Since implementing TRUST in July, we haven't looked back. We recouped our cost in one assignment. In five short months we have already achieved 50 per cent of our inaugural target for the year. Around 30 per cent of clients invited into the process generated further work from their assessment. This produces an average of about \$600/hr minimum".



The world leaders in helping
Accounting firms dramatically
improve their financial position

www.nixonadvantage.com

“Mentoring and new material
allow us to add value to our
client’s businesses”

Leah Peacock
Director, Sudburys Limited
Whangarei, New Zealand



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