



How to go from FREE to PAID advisory services

Nayo Carter-Gray, EA



CPE Process

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- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
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Today's speaker



Nayo Carter-Gray, EA
Founder/Lead Accountant
[@NayoCarterGray](#)

About today's speaker



Nayo Carter-Gray, EA
Founder/Lead Accountant

Enrolled Agent

Intuit Accounting Council 2018-2019

Hubdoc Top 50 Cloud Accountant North America (2017 & 2018)

Currently sitting for the CPA exam

Agenda

1. Identify what advisory services you are currently giving away for free
2. Strategies on how to go from giving these services away for free to now charging for them
3. How to identify and implement one simple advisory service you can offer as soon as you return home from QBC



Agenda

Identify what advisory services you are currently giving away for free

What is advisory?

Strategies on how to go from giving these services away for free to now charging for them

How to identify and implement one simple advisory service you can offer as soon as you return home from QBC



What is advisory?

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Having or consisting in the power to make recommendations but not to take action enforcing them.

Oxford Dictionary



What services could be considered advisory?

Answering questions

Researching apps

Tax planning strategies

Expense or cash flow projections

KPI or Metric tracking

Budgeting

Setting up new tools or software

Profit first implementation

Solving a pain point or helping your client reach a goal is ultimately advisory services!

Agenda

Identify what advisory services you are currently giving away for free

Strategies on how to go from giving these services away for free to now charging for them

How are your clients getting these services from you already?

How to identify and implement one simple advisory service you can offer as soon as you return home from QBC



**How are your clients
getting these services
from you already?**

How are your clients getting these services from you?

Phone calls (scheduled and unscheduled)

Emails

Social Media

You VOLUNTEERING

Being readily available to clients can often lead to scope creep!

How to **STOP** giving away these services for **FREE**

This is just a few ways you can prevent giving away these valuable services for free...



These are just a few ideas to prevent you from advising your clients without getting paid for it:

- Use engagement letters
- Set up services with a fee on your online scheduler
- Respond to email requests using the new online calendar links
- Stop answering the phone



Lets Roll Play...

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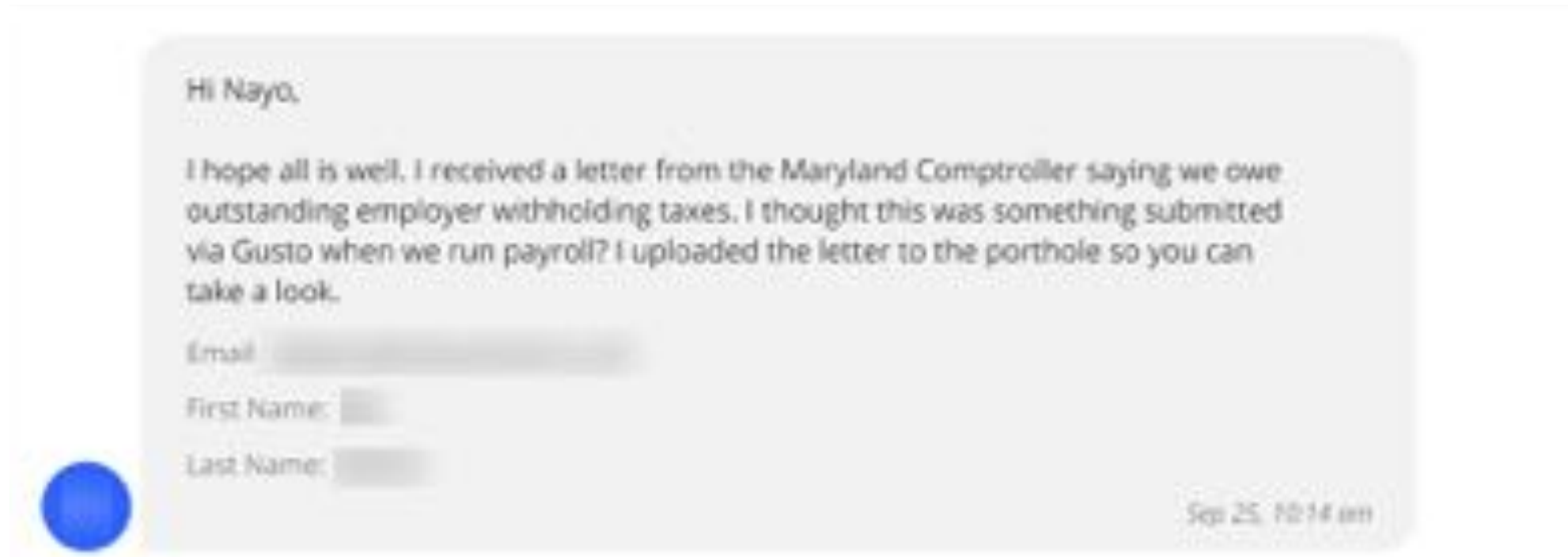


Lets Roll Play...



How to respond to out of scope emails?

How would you handle this if you don't provide payroll services for an existing bookkeeping client?



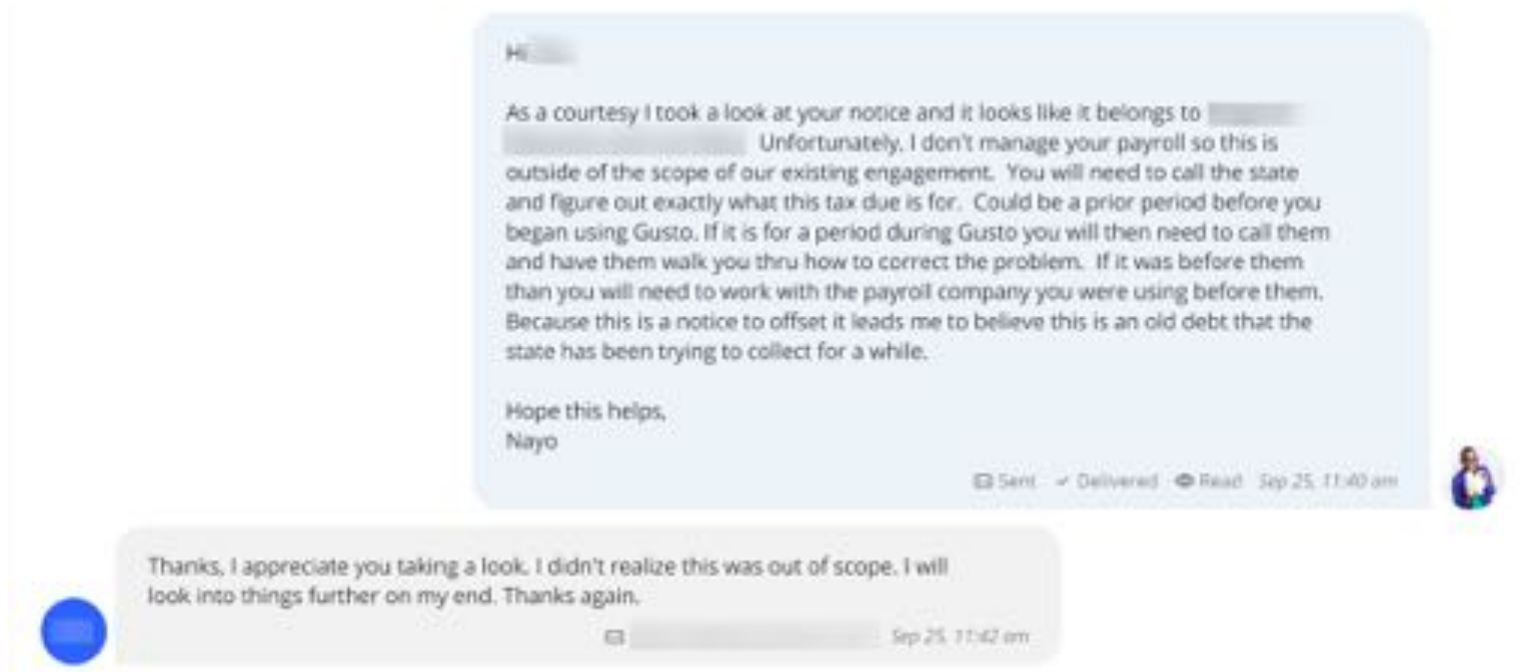


Lets Roll Play...



My actual response...

Remind the client of existing engagement and look for ways to add additional services to increase revenue!





This service is not currently offered in your existing engagement but we can add it as an additional service at \$ XXX.XX rate?





Promote your service!

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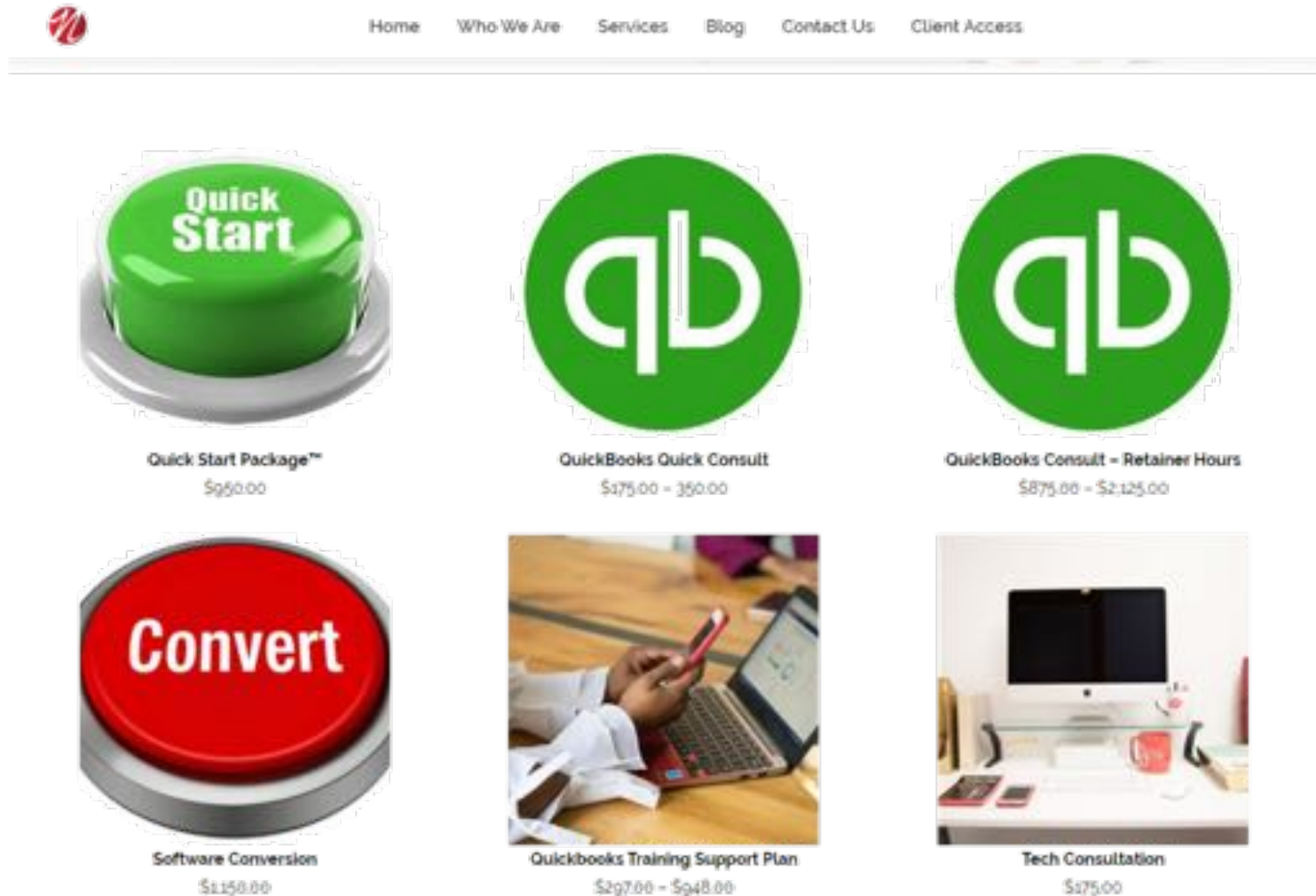
Are you using your website to sell your services?

Make it easy for client to schedule and pay for your advisory services by using an online scheduler.




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With Reconciled's Virtual Fractional CFO Services Package, a seasoned accounting professional (with entrepreneurial chops) will help solidify your company's financial future.

Our CFO-level service is tailored specifically to the needs of your business, and we see ourselves as part of the team — invested in your success. We'll sit down with you to understand exactly what type of financial management will help you move toward your goals. The benefits our customers most appreciate are:

- ✓ Monthly financial reviews with your team and participation in board meetings.
- ✓ Customized financial statements, including cash flow forecasting.
- ✓ Communication with banks and other lending institutions on your behalf.
- ✓ If you want additional services, ask us.

We can also manage your in-house accounting team or handle more complicated transactions. We work with you to understand exactly what you need, and all of our services are backed by a satisfaction guarantee.

Are you using your website to sell your services?

Make it easy for client to schedule and pay for your advisory services by using an online scheduler.

The screenshot displays the Blueprint Accounting website. At the top, the logo "blueprint ACCOUNTING" is on the left, and a navigation menu with links "WHY WORK WITH US", "SERVICES & PRICING", "TEAM", "BLOG", "CONTACT", and "FRANÇAIS" is on the right. Below the navigation, a section titled "ADDITIONAL SERVICES" is centered. This section contains six service cards arranged in a 2x3 grid. Each card features a green icon, a service title, and a brief description. The services are: Bill Pay (dollar sign icon), Expense Reporting (chart icon), Invoicing (document icon), Historic Account Reconciliation (refresh icon), Payroll (calendar icon), and Collections (briefcase icon). Below the services section, a call to action reads "READY TO TAKE YOUR BUSINESS TO THE NEXT LEVEL? GET STARTED BY EXPLORING POSSIBILITIES WITH OUR CONTROLLER AND CFO SERVICES". At the bottom, there are two large buttons: a green "CONTROLLER" button and a blue "CFO" button.

blueprint
ACCOUNTING

WHY WORK WITH US SERVICES & PRICING TEAM BLOG CONTACT FRANÇAIS

ADDITIONAL SERVICES

- BILL PAY**
We'll manage your vendor payments
- EXPENSE REPORTING**
Automate your employees expense reimbursement claims
- INVOICING**
Automate your revenue cycle
- HISTORIC ACCOUNT RECONCILIATION**
Get your bookkeeping caught up
- PAYROLL**
We'll make sure your employees get paid, no more errors or penalties
- COLLECTIONS**
Let us handle collections follow-up to get you paid faster

READY TO TAKE YOUR BUSINESS TO THE NEXT LEVEL?
GET STARTED BY EXPLORING POSSIBILITIES WITH OUR CONTROLLER AND CFO SERVICES

CONTROLLER

CFO

Agenda

Identify what advisory services you are currently giving away for free

Strategies on how to go from giving these services away for free to now charging for them

How to identify and implement one simple advisory service you can offer as soon as you return home from QBC

What service can you quickly add?

Where to find opportunities?

How to price for this service?

A portrait of a Black man with a beard, wearing a dark suit, white shirt, and patterned tie. He is looking slightly to the left with a thoughtful expression, his right index finger resting on his chin. The background is a textured, light gray wall.

**What new advisory service
can you implement right away?**

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Start in the vendor area!

Explore solutions to your clients pain points and goals.



The Vendor area is a great place to start if you don't know where to start in advisory.

- Get certified or become an expert in a particular app solution
- Find apps that can relieve stress for your niche clientele
- Learn how to build custom solutions by discovering which apps work well with one another
- Look for apps or vendors to solve future problems

A blurred background image showing two business professionals, a man and a woman, sitting at a table. The man is on the right, wearing a blue suit and a watch, holding a white coffee cup. The woman is on the left, wearing a dark suit. A silver laptop is open on the table in front of them. The scene is set in a modern, brightly lit office or meeting space with wooden accents.

What goal can I help you reach?

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Ask yourself the following questions?

Is the new service a stand alone service that will only be offered to new customers?

Do you need to have a conversation with existing customers to explain to them that after _____ date they will need to pay _____ to continue to get _____ service?

Practicing with existing clients can make introducing advisory services to new clients easier!



How much should you charge?

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How to charge for these services?

- Hourly rate
- Discounted rates for advanced purchase of multi-hour packages
- Industry standards / fee surveys
- Build support packages for multiple services
- Asking for the upsell

Offer a limited time discount to existing clients at the introduction of the new service if you aren't confident on pricing!



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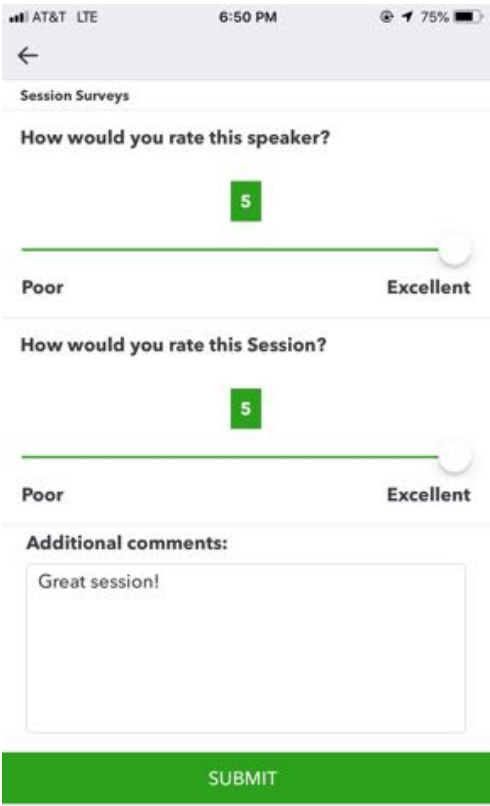
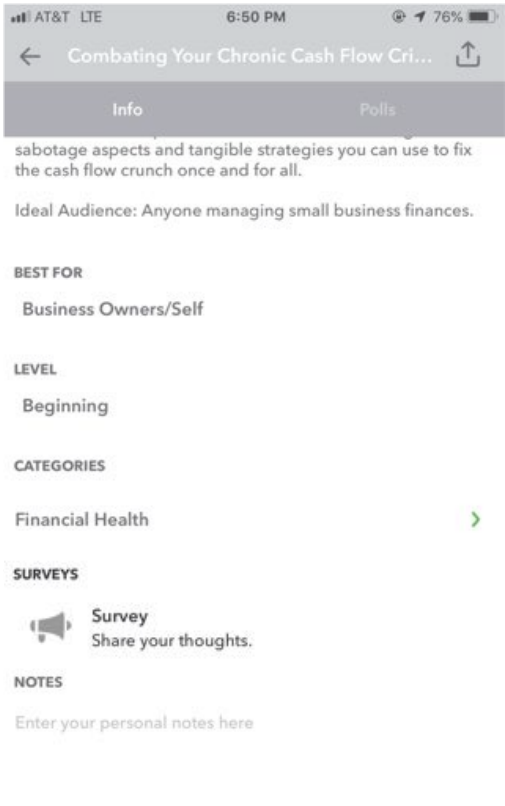
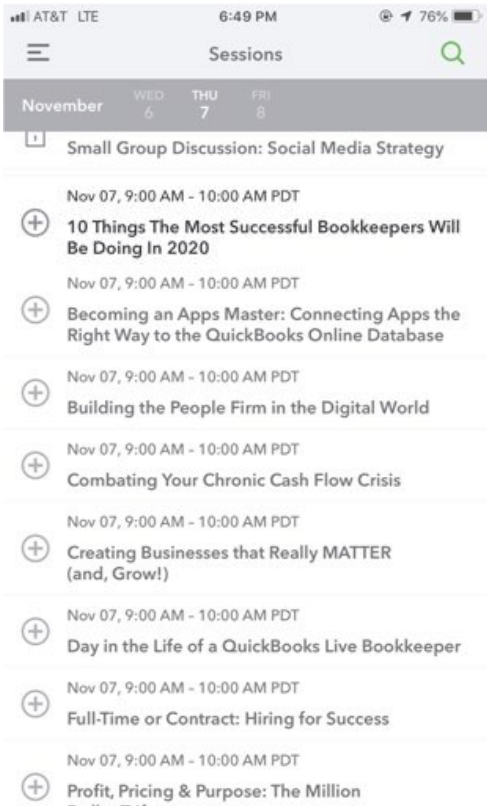
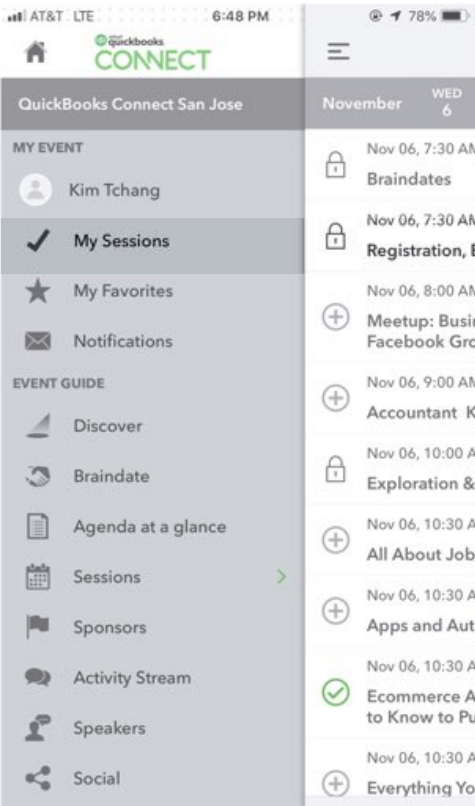


Questions?

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1. Find the session on the agenda
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<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. Below the header, there are tabs for November 6 (Accountant Day), November 7 (selected), and November 8. A 'Print Agenda' link is visible. The main content area features a search bar labeled 'Search for sessions' and a row of filters: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda list for November 7 includes: 7:30-7:00 am (empty), 7:30-10:30 am (Registration, Breakfast & Exploration), 8:00-8:30 am (Yoga), and 8:00-8:45 am (Breakout Sessions). The Breakout Sessions section lists five items, each with a '+' icon for more information: Small Business Meetup: Relationship Marketing and the Power of Human Connection, Small Group Discussion: Social Media Strategy, Small Group Discussion: Showing up - Why What You Wear Matters, and Small Group Discussion: Build Your Dream Bookkeeping firm.

QuickBooks CONNECT Why Attend Agenda Speakers Pricing Sponsors Travel FAQ Register now

November 6 Accountant Day November 7 November 8 Print Agenda

Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.

Search for sessions

Filters: Business Growth Life & Business Skills Organizational Culture Technology Training Advisory Financial Health Expand all +

7:30-7:00 am

7:30-10:30 am Registration, Breakfast & Exploration

Braindates
New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#)

Best for: All Audiences
CPE Hours: not eligible

8:00-8:30 am Yoga

8:00-8:45 am Breakout Sessions

Small Business Meetup: Relationship Marketing and the Power of Human Connection

Small Group Discussion: Social Media Strategy

Small Group Discussion: Showing up - Why What You Wear Matters

Small Group Discussion: Build Your Dream Bookkeeping firm



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THE
FUTURE