

# **ANALYTICS AND ADDING VALUE TO YOUR CLIENT**

**Mark Edmondson - CEO, Inflo**

**ICAEW Virtual Conference – 15 May 2018**

# ANALYTICS AND ADDING VALUE TO YOUR CLIENT



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# AGENDA FOR TODAY



**Core principles of value**



**Transitioning the value proposition**



**Shifting the client perspective**



**Applying the theory**

# CORE PRINCIPLES OF VALUE

**1**

## **OUTPUTS**

Tangible results

**2**

## **TIMELINESS**

Produced quickly and regularly to maximise impact

**3**

## **FOCUS**

A meaningful level of granularity

**4**

## **RELEVANCE**

Tailored to specific client interest areas

**5**

## **PERSPECTIVE**

A viewpoint not readily available internally

# TRANSITIONING THE VALUE PROPOSITION



## CURRENT STATE

- Summary level
- Last minute

**ACCOUNTANT**



## REQUIRED FOR OPTIMUM VALUE

- Transactional detail
- Proactive sharing

**ADVISOR**

# TRANSITIONING THE VALUE PROPOSITION



## CURRENT STATE

- Summary level
- Last minute

**ACCOUNTANT**



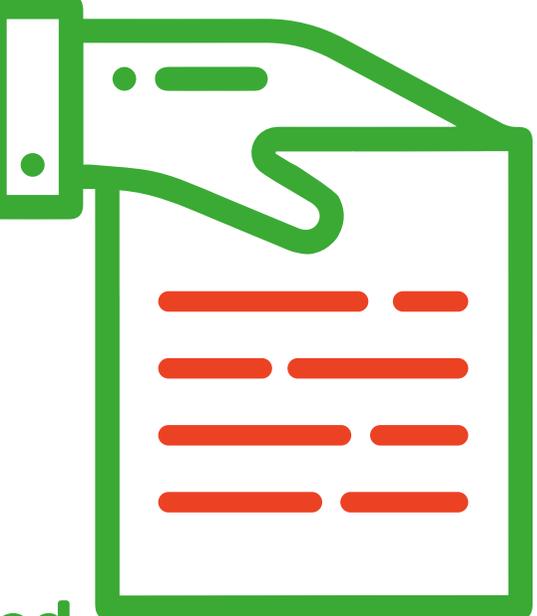
## REQUIRED FOR OPTIMUM VALUE

- Transactional detail
- Proactive sharing

**ADVISOR**

# SHIFTING THE CLIENT'S PERSPECTIVE

## COMPLIANCE



- Focus on cost
- Unengaged
- Deadline orientated

- Focus on value
- Central to process
- Increased regularity

## ADVISORY



# SHIFTING THE CLIENT'S PERSPECTIVE

**COMPLIANCE**

- Focus on cost
- Unengaged
- Deadline orientated



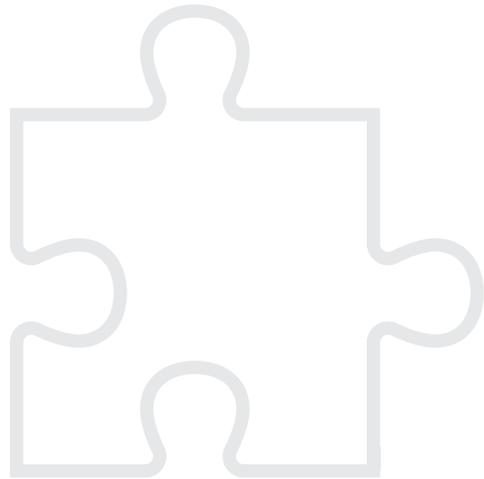
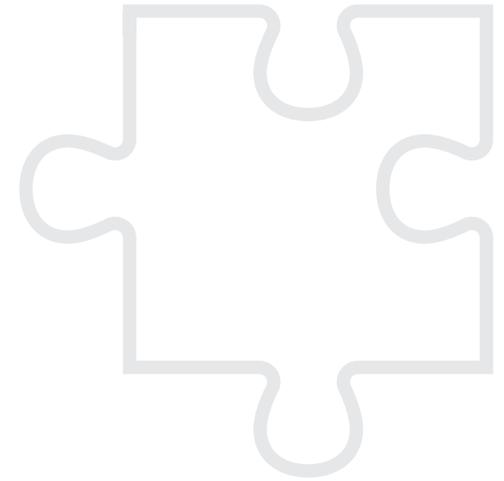
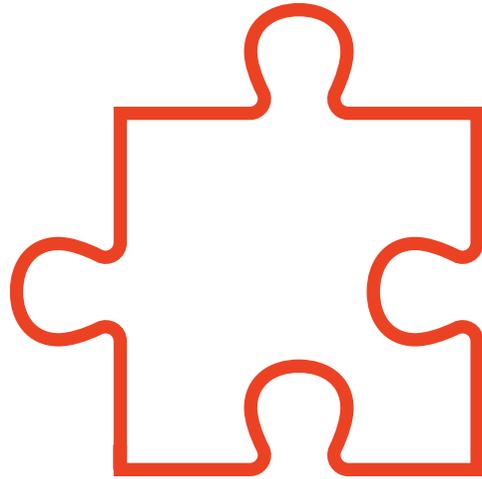
- Focus on value
- Central to process
- Increased regularity

**ADVISORY**

# SHIFTING THE CLIENT'S PERSPECTIVE

## WHAT DOES THE CLIENT GET?

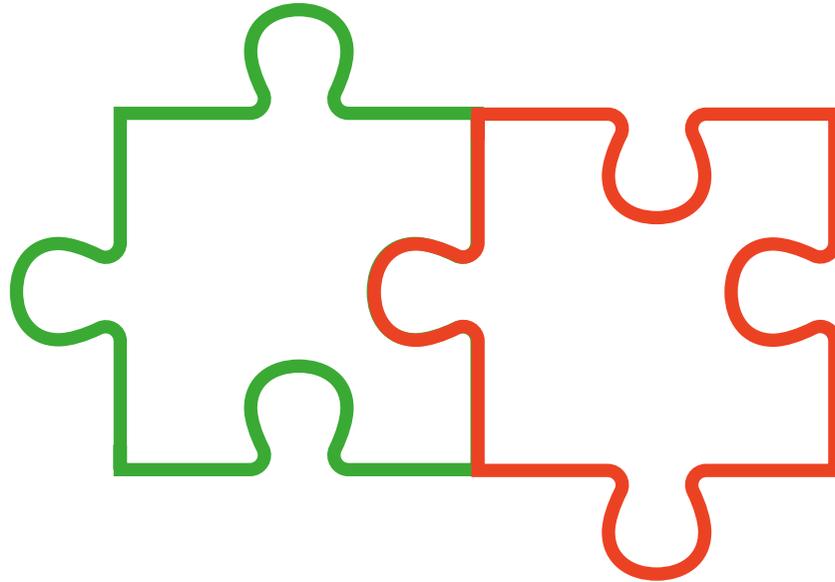
**DEEP  
UNDERSTANDING  
OF THEIR GOALS**



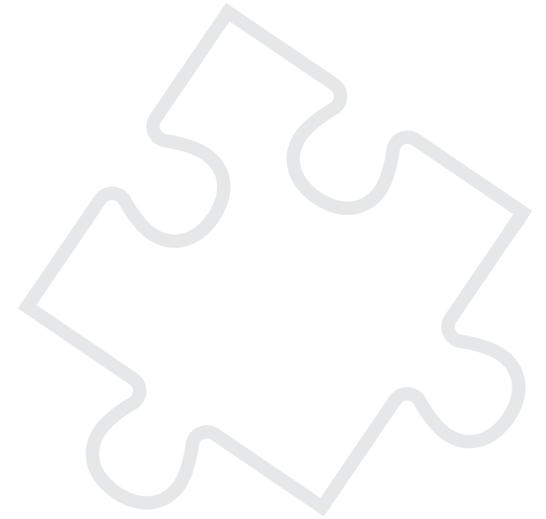
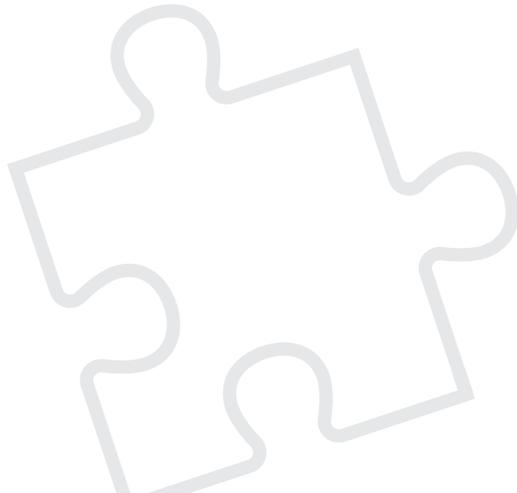
# SHIFTING THE CLIENT'S PERSPECTIVE

## WHAT DOES THE CLIENT GET?

**DEEP  
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**INSIGHTFUL  
ADVICE**

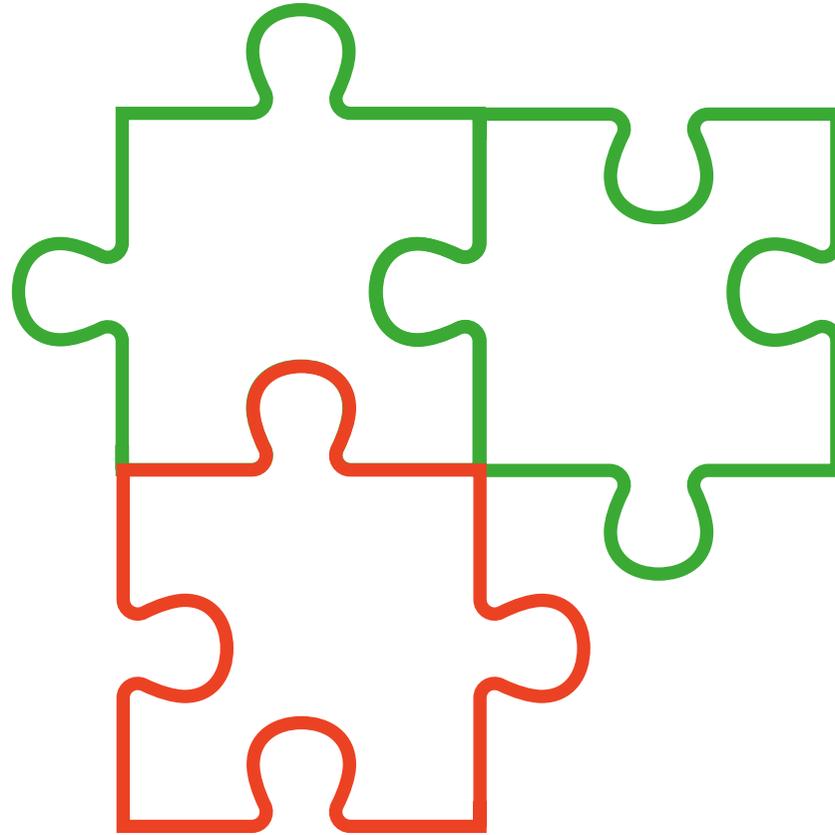


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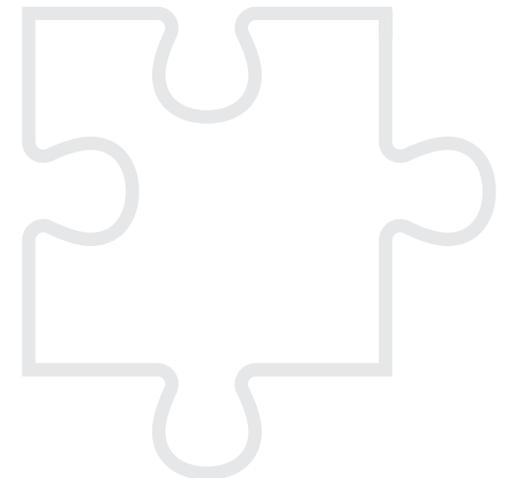
## WHAT DOES THE CLIENT GET?

**DEEP  
UNDERSTANDING  
OF THEIR GOALS**

**PROACTIVE  
PARTNER**



**INSIGHTFUL  
ADVICE**

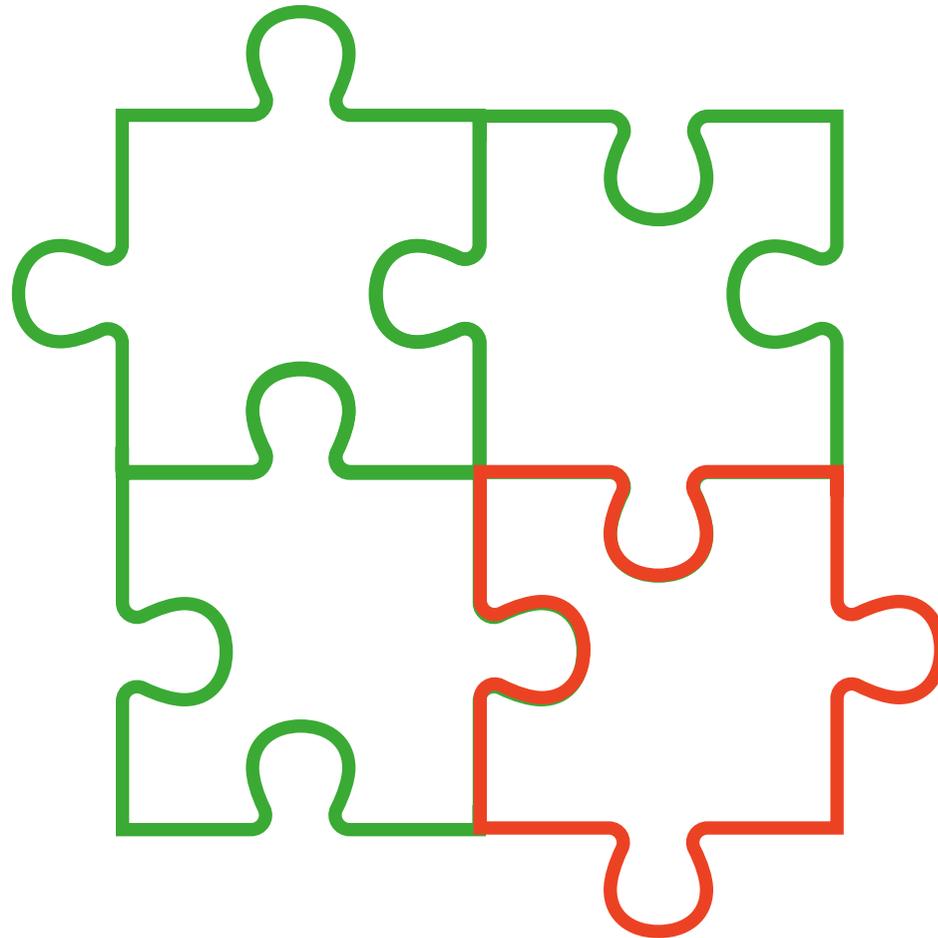


# SHIFTING THE CLIENT'S PERSPECTIVE

## WHAT DOES THE CLIENT GET?

**DEEP  
UNDERSTANDING  
OF THEIR GOALS**

**PROACTIVE  
PARTNER**



**INSIGHTFUL  
ADVICE**

**ACTIONABLE  
ANALYSIS**

# APPLYING THE THEORY

**HOW CAN THESE  
TECHNIQUES BE APPLIED  
PRACTICALLY AS PART  
OF A SERVICE OFFERING?**

# APPLYING THE THEORY

HOW CAN THESE  
TECHNIQUES BE APPLIED  
PRACTICALLY AS PART  
OF A SERVICE OFFERING?

CASE STUDY EXAMPLES

# APPLYING THE THEORY



# CASE STUDY EXAMPLES

# APPLYING THE THEORY

**4**  
CASE  
STUDY  
EXAMPLES



**ACCOUNTS  
PREPARATION**



**AUDIT**



**FORENSICS**



**DEALS**

# APPLYING THE THEORY

**CAN BE DONE AT ANY  
POINT IN TIME**



# APPLYING THE THEORY



**CLIENTS  
ARE ASKING  
ADVISORS TO  
DEMONSTRATE  
TECHNOLOGY**

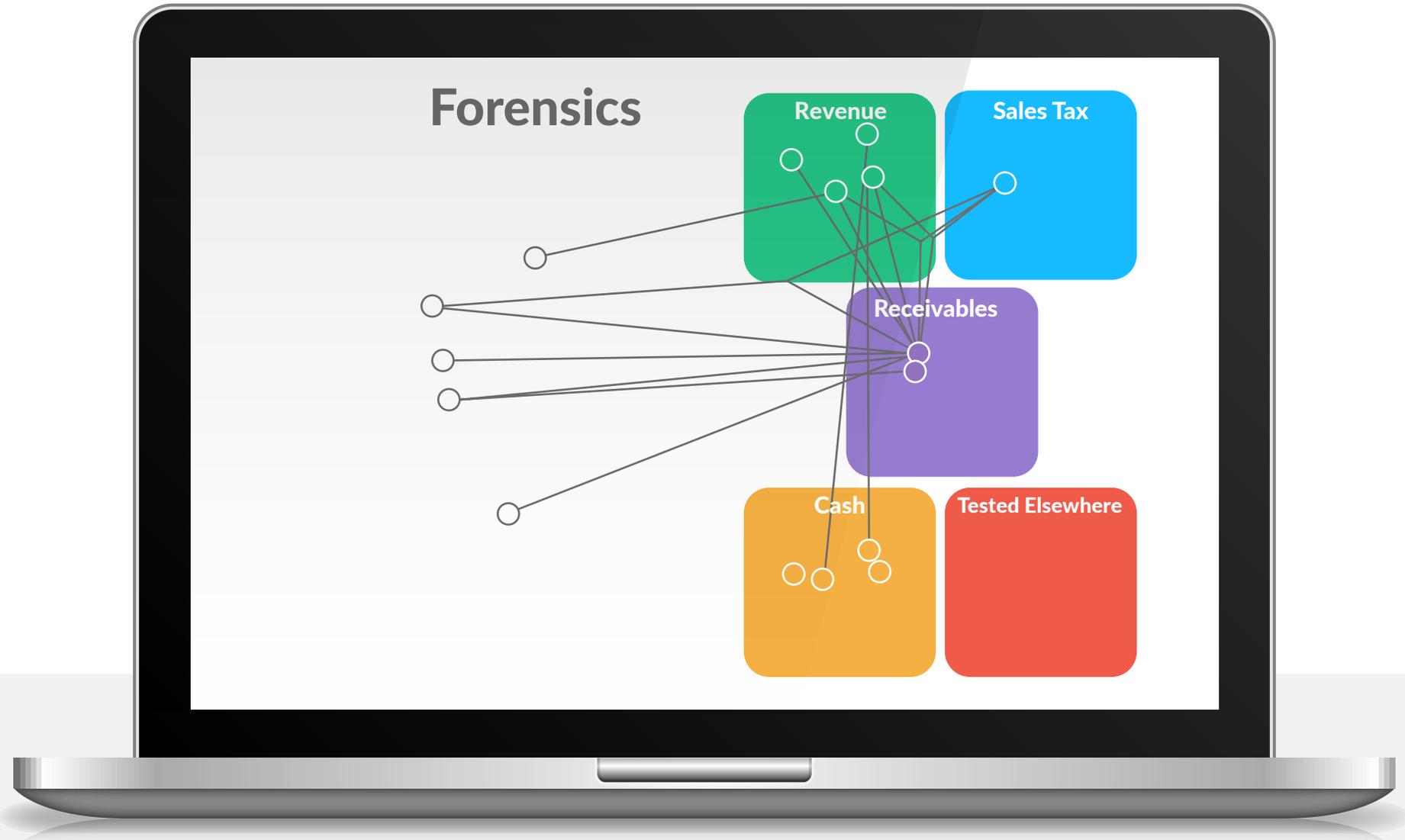
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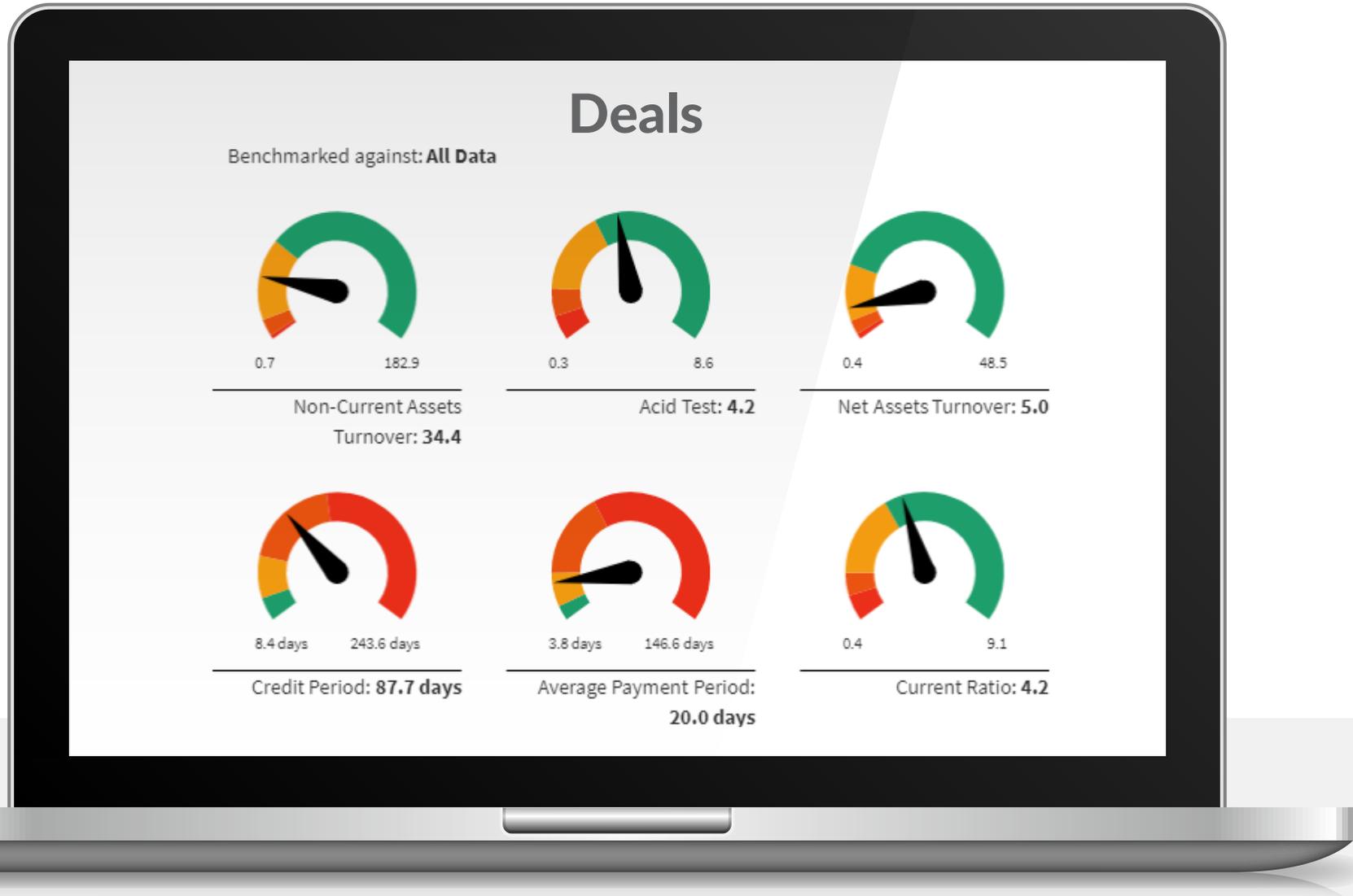
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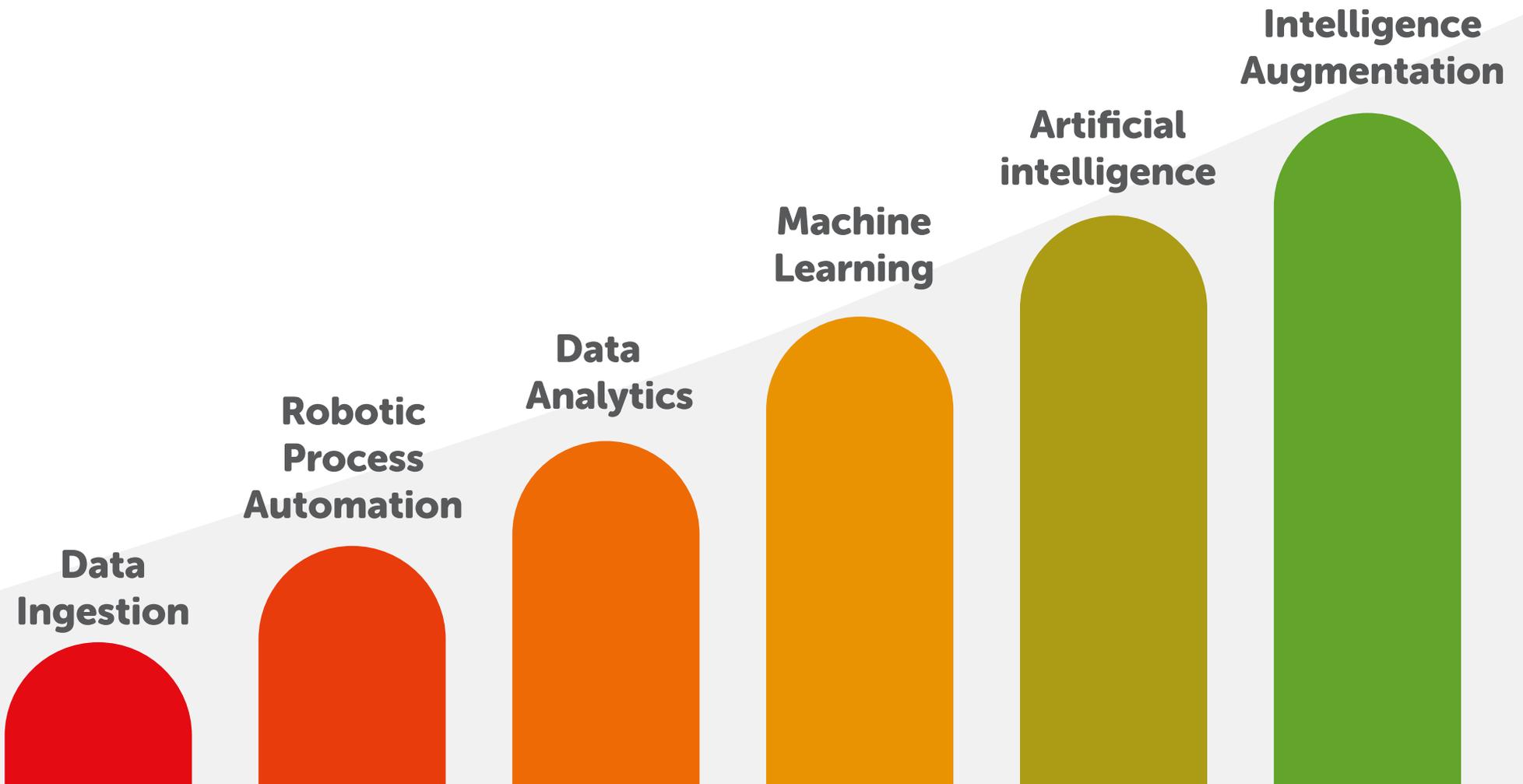


# APPLYING THE THEORY



**To utilise  
advanced capabilities  
accounting firms must  
follow a logical journey**

# APPLYING THE THEORY



**To utilise advanced capabilities accounting firms must follow a logical journey**