
BUSINESS ADVISORY SERVICES

BAS002 Vision For The Future Of Accountancy Businesses

Name: _____

Date: _____

Products and services to be supplied by accountancy businesses, offering business advisory services, will include some (if not all) of the listed products/services. What products/services does your accountancy business provide?

(SIGN UP TO WWW.ESSBIZTOOLS.COM.AU TO ACCESS ADDITIONAL FORMS)

- Accountancy Services:
 - tax returns Yes ☐ No ☐
 - tax planning/minimisation Yes ☐ No ☐
 - other compliance services Yes ☐ No ☐
 - audit Yes ☐ No ☐
 - superannuation fund audits Yes ☐ No ☐
- Financial Planning:
 - wealth creation Yes ☐ No ☐
 - insurance broking Yes ☐ No ☐
 - finance broking Yes ☐ No ☐
 - advisory Yes ☐ No ☐
- Chief Financial Officer's Services (BAS018) Yes ☐ No ☐
- Strategic Management Consultancy (BAS019) Yes ☐ No ☐
- Business Advisory Services:
 - personal property securities register system advice Yes ☐ No ☐
 - business health check Yes ☐ No ☐
 - management of costs Yes ☐ No ☐
 - government grants and assistance Yes ☐ No ☐
 - management mentoring Yes ☐ No ☐
 - business plans Yes ☐ No ☐
 - business models Yes ☐ No ☐
 - budgets Yes ☐ No ☐
 - cashflow forecasts and management Yes ☐ No ☐
 - debtors' management Yes ☐ No ☐
 - work in progress management Yes ☐ No ☐
 - inventory management Yes ☐ No ☐
 - risk management strategies Yes ☐ No ☐
 - human resources strategies Yes ☐ No ☐
 - corporate governance Yes ☐ No ☐
 - succession planning Yes ☐ No ☐
 - cash management Yes ☐ No ☐
 - family businesses Yes ☐ No ☐
 - exporting Yes ☐ No ☐
 - buying a business Yes ☐ No ☐
 - selling a business Yes ☐ No ☐
 - leadership Yes ☐ No ☐
 - dealing with banks Yes ☐ No ☐
 - capital/loan raising Yes ☐ No ☐

- applications for loans	Yes <input type="checkbox"/>	No <input type="checkbox"/>
- investment readiness	Yes <input type="checkbox"/>	No <input type="checkbox"/>
- estate planning	Yes <input type="checkbox"/>	No <input type="checkbox"/>
- business valuations	Yes <input type="checkbox"/>	No <input type="checkbox"/>
- self-managed superannuation funds (administration)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Asset Management		
- intellectual property documentation and protection	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Retirement Planning	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Market Research	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Marketing	Yes <input type="checkbox"/>	No <input type="checkbox"/>
• Information Technology	Yes <input type="checkbox"/>	No <input type="checkbox"/>
- cloud technology consulting	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Preparation by the accountancy business to offer non-compliance services:

Marketing:

- Do you employ a marketing person? Yes ☐ No ☐
- If yes, what is the approximately % of time allocation for:
 - internal marketing work for your accountancy business? %
 - marketing assignments on behalf of clients? %
- Is the marketing person spending enough time on "internal marketing work" to assist in generating sufficient leads to achieve the targeted income for business advisory services? Yes ☐ No ☐
- If you don't currently employ a marketing person, does your firm propose to do anything about this? Yes ☐ No ☐
- If yes, when _____

Sales:

- Do you employ a sales person? Yes ☐ No ☐
- Has your accountancy team participated in a "professional sales" course? Yes ☐ No ☐
- If you don't currently employ a sales person, will your accountancy business be able to generate the targeted additional sales revenue? Yes ☐ No ☐

Comments:

SIGNUP AS A GUEST TO ACCESS MORE BUSINESS ADVISORY MATERIAL