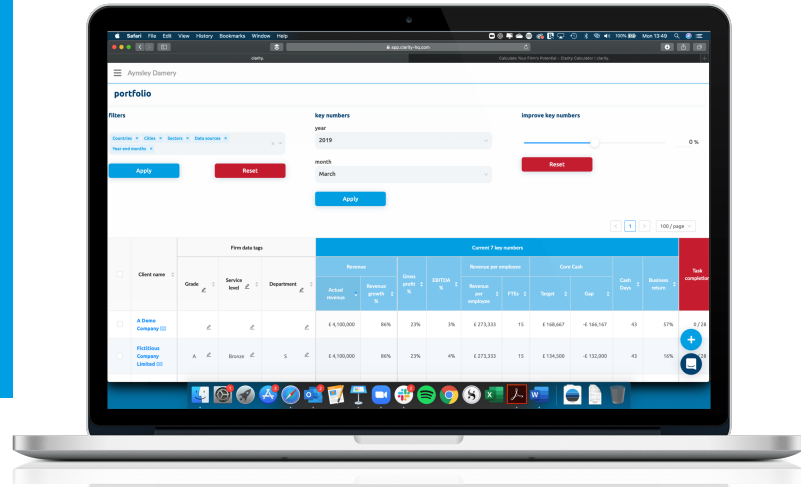


# Business Advisory Reimagined

3x your firm's profits with the structure, education & step-by-step implementation plan for a cloud and AI world



## Benefits

**1** **Clients can see the value**  
Clients want more money, time or freedom. Stop selling management accounts, cashflow forecasts or budgeting! Clarity demonstrates the potential and shows the outcomes your clients want in a way that they can easily understand and say yes to!

**2** **'Plug and Play' Advisory**  
Whether you're already delivering business advisory to your top 10% or not, clarity works! It automates your advisory, reporting and insights workflows making it faster and easier to deliver, whilst getting the team involved. All in one place!

**3** **Step-by-step implementation plan**  
Our member success team are accountants and so understand you and your challenges. Our proven implementation plans work. And they constantly evolve, so that you can always jump the curve!

**4** **3x your firm's profits**  
Unlock your full potential. Our accountants are able to consistently 3x their profits (and those of their clients) by delivering higher value and more profitable services that small businesses can afford and want to pay for.

Clarity® completely transforms the way business advisory services are delivered.

Are you still trying to sell and deliver traditional/old-school/desktop-style/bespoke business advisory services? Or you've tried, and it just doesn't work. It's too hard and takes too much time, clients don't get it and, in reality, only your senior team can deliver. You're already overwhelmed and don't have the time to do more. Reporting tools just don't cut it. Sounds familiar? What if there was an easier way?

At Clarity, we help progressive accountants market, sell, price and deliver reimagined business advisory services at scale. All in one platform!

Starting from just 90 mins a week for the first three months, our simple step-by-step implementation plan, coupled with our education systems and member success team, will ensure you generate \$40K/£30k/AU\$60k GRF within that period, or your money back.

Thereafter, we help you build a well-respected and successful transformational accounting firm that earns three times your existing profit with a happier team and clients.

**“If you think that Clarity is just a piece of software, you're missing the point. It's a mindset, a different way of doing business and a complete shift in the way we deliver clients services”**

Graeme Tennick, Tennick Accountants - Xero Small Firm of the Year 2023, Accounting Excellence Awards 2023, Best Digital Accountants 2020

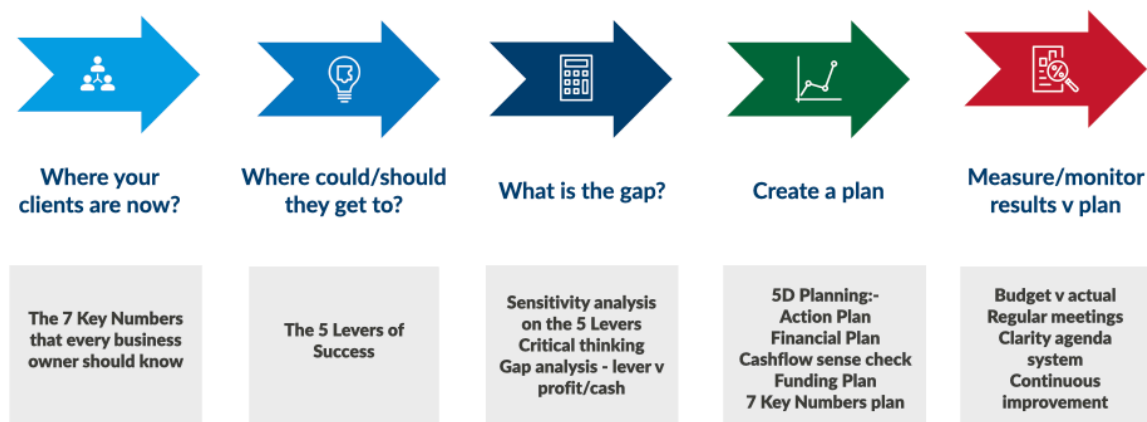


## Our solution

Clarity combines the power of:

- an end-to-end technology-led platform - to do the heavy lifting;
- hi-impact structure and processes - to get the same great results each and every time for both your firm and your clients;
- education, implementation and accountability programs- beyond advisory, helping you and your firm become elite; and
- member events and a vibrant community - empowering your team, firm and clients to achieve success.

## The Clarity Repeatable Business Advisory Journey



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## Features

- **Portfolio view** - powerful insights all on one screen. Monitor key metrics, sort and filter clients to segment them, understand which clients are advisory-ready, and view the potential for the firm and individual clients.
- **Benchmarking** - benchmark clients within the firm or against all small businesses on the platform by sector/ location. Produce detailed or simple reports at the click of a button.
- **Engaging clients** - meeting and agenda systems that engage your clients and get them excited about working with you. Collaborate with your clients on their 7 Key Numbers and the 5 Levers of Success to help them understand what's possible and see the total effect of any changes on their profit and cash position.
- **Co-create plans** - create action, growth, and funding plans with your client, together with suggested tasks, to enable your team to drive accountability and help clients achieve their goals.
- **Plug and Play** - learn and access systems, processes, template emails, agendas, and checklists to build your ideal firm and deliver success to your clients..
- **Data room** - verify essential business documents and assets in clients' own data room ready for when they require borrowing, funding, or exit.
- **Modern-day management reporting** - generate reports at the click of a button, create a financial plan, cashflow sense check, and 7 Key Numbers plan for all of your clients in minutes.
- **Funding** - help your clients get their business funded with our 3-step funding process.
- **Repeatable ongoing advisory** - eliminate scope creep and avoid over-delivery. Systems and education to deliver differentiated and efficient ongoing business advisory work.
- **Education** - upskill your team with innovative education, systems, and processes on both the soft and hard skills necessary to help your teams develop and deliver outstanding services
- **World-class member success team** - support unlike any other to help your firm beyond advisory and access to a vibrant community and iconic events

**“Clarity is a powerful platform that helps practices provide effortless business advisory services, realizing the true potential of both accounting firms and their clients.”**

Xero

For more info, or to book a personalized demo, visit [clarity-hq.com](https://clarity-hq.com)

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