

A man and a woman are standing in an office, smiling and talking. The woman is on the left, wearing a yellow button-down shirt and dark trousers, holding a tablet. The man is on the right, wearing a light blue button-down shirt and khaki trousers, gesturing with his hands. They are both looking at each other and smiling.

Scaling Advisory:

*Strategies for Building, Selling,
and Delivering Profitably*

ABOUT SHIREEN + MAIOR



- **THEN:** Formerly an AmLaw50 litigator, COO of a national law firm, led operations and strategy for \$1B+ consulting division of KPMG, Transformation and Growth for BDO's consulting division.
- **NOW:** The consulting partner for leaders looking to increase revenue and profitability, develop new growth strategies, and stand out in a crowded market.

Momentum in the Making

Progress is emerging, but it's not yet the norm

- **Dedicated leadership**
Advisory as a real mandate, not a side hustle
- **Client-influenced offerings**
Credibility built through small, demand-driven tests
- **Repeatable frameworks**
Toolkits and templates replace one-offs
- **Mindset shift**
From compliance answers to advisory thinking

Current Landscape

Margins live in advisory; audit/tax are commoditizing

- **Internal friction**
Leadership buy-in varies; legacy metrics and incentives don't fit advisory
- **Fragmented offerings**
Scattered services, no central hub or ownership
- **Time poverty**
Hard to build momentum when advisory is a side hustle
- **Go-to-market confusion**
Unclear what to sell, who sells it or how to position it
- **Staffing gaps**
Mid-level doers stretched thin; mindset leap from compliance to advisory

Solutions

01. Win the Inside Game First

Advisory is a startup inside a citadel

1. Owner + mandate

Name a dedicated lead with budget, visibility and authority.

2. Sponsorship cadence

Practice sponsors (credibility) + delivery leads (execution).

3. Pilot funding

Stage-gate spend; set clear goals and “kill the rules” to test and scale fast.

4. Hidden Wins

Track advisory work already happening (e.g., tax, transaction support, etc.).

5. New Metrics

Focus on pipeline, recurring revenue and margin (not realization or hours).

6. Make Adjustments Visible

Share course corrections openly to build trust and momentum.



CASE STUDY

Pilot to Proof: Repeatable Wins

- A regional firm tied pilot funding for cybersecurity advisory to a \$20K business development budget.
- They set an 8-week “assess and stop” rule; after two small client proposals closed, leadership extended budget for scaling.

Poll #1

THE ROADBLOCKS WITHIN



1. Does your firm have a named **owner for advisory** with a formal mandate today?
2. What is **your biggest barrier** to internal buy-in?
 - ✓ leadership support
 - ✓ comp/retirement incentives
 - ✓ competing client loads
3. Do you currently **track hidden advisory revenue** that's embedded in other practices?

02. Follow Your Clients, Not Your Competitors

It is easier to meet demand than try to create it



1. Insights Engine

Talk with top clients; note where they pull you into strategy or pain points.

2. Sector Radar

Learn your clients' industries: spot patterns early and keep it practical, but not academic.

3. Start where Demand Repeats

Build around repeated asks that tie to existing services and capacity.

4. Client-in-Residence

Pilot new offerings with trusted clients before launch.

Client Accounting Services is often the first step into advisory, a natural bridge from compliance.

Think of it as “diet consulting”: a way to build comfort with higher-level client conversations.

Just don't stop at cleanup and reporting; staying in “your mess for less” leaves value on the table.



CASE STUDY

Following Friction from Demand to Delivery

- A healthcare-focused firm noticed repeated frustration with Medicaid reporting.
- They launched a standardized compliance toolkit and a quarterly update webinar series, both advisory add-ons that drove cross-sell from existing clients.

Poll #2

CLIENTS, COMPETITORS OR
PARTNERS:

WHICH VOICE LEADS?



1. When you think about starting or growing advisory, what is your **biggest influence** today?
 - ✓ client demand
 - ✓ competitor offerings
 - ✓ partner interest
2. Do you feel your firm is more likely to **overbuild services** or **under listen to client signals**?

03. From Services to Solutions: Selling Advisory Effectively

Make it easier for clients (and partners) to buy

1. Cross Sell Smarter:

Don't wait for partners to "get it." Review top clients for advisory triggers: growth, regulation, transitions.

2. Partner Training

Shift from compliance talk to advisory conversations built on curiosity and outcomes.

3. Write Your Clients' Victory Speech

Frame outcomes in client terms (e.g., "This plan frees \$5M for our next phase").

4. Targeted Events

Go small and deep. Co-host panels with other experts to solve real business issues.

5. LEA Multiplier

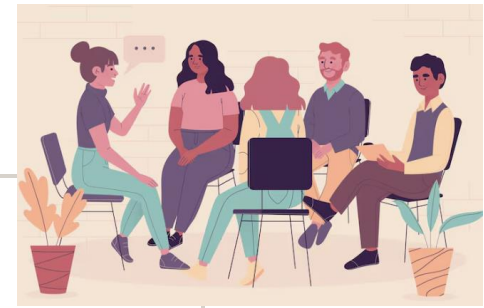
Share wins and patterns across firms – a rising tide lifts all boats.

6. Your Voice

Stand out by sounding human, not corporate.

CASE STUDY

Building Trust at Scale



- A midwestern firm built a quarterly CFO “ask me anything” event.
- The clients came to meet their peers, the firm learned what was top of mind for new services and thought leadership, and trust was built over time.

Poll #3

WHERE DOES YOUR
ADVISORY PITCH
BREAK DOWN?



1. Which is your firm's **weakest business development** link today?
 - ✓ cross-sell
 - ✓ client-facing pitch
 - ✓ external visibility
2. Do you think your **firm brand** or your **individual partner brands** carry more weight in winning advisory work?

04. Package the Work (Repeatable > Heroics)

Bespoke outcomes but standardized methods ensure happy clients and healthy margins

1. Centralize and Catalog

Create a simple advisory hub to unify offerings + make cross-sell easy.

2. The “Firm Way” playbooks

Define scope, deliverables, roles, and timelines so every offering runs the same way—no reinvention each time.

3. Obsess about Client Experience

Standardize kickoff FAQs, check-ins, and budget updates; deliver in ways that are easy for clients (not you).

4. Monetize continuity

Turn one-off projects into ongoing value (e.g., quarterly “health checks” or benchmarking dashboards).



CASE STUDY

Consistency That Scales Profitably

- A firm serving manufacturers turned recurring “clean-up” control projects into a standardized “Operational Readiness Review” focused on purchasing, inventory, and cash disbursement cycles.
- Clients valued the consistency and benchmarking, and standardized templates let junior staff handle 70% of the work—cutting delivery time and lifting margins.

05. Developing Advisors, Not Just Accountants

Hire for judgment + flex for scale

1. Mid-Level Bench

Prioritize experienced doers who can own projects and client delivery.

2. Hard + Soft Skill Training

Create a 12-month track with rotations, shadowing, and mock client sessions to shift from explaining rules to guiding decisions – building listening, curiosity, and judgment.

3. Hybrid bench

Use vetted independents or offshore support for analysis; keep partners on high-value work.

4. Fractional Help

Tap contract CFOs or specialists to add capacity and test demand without over hiring.



CASE STUDY

Proving Value Before Scaling Up

- A midsize firm wanted to pilot a new cybersecurity advisory offering but didn't yet have internal expertise.
- They brought in a fractional CISO to help them deliver the first three projects.
- The outside specialists gave the firm instant credibility with clients and allowed them to test demand without committing to full-time hires.

06. Price for Value to You and Your Clients

Hours measure effort... but clients pay for outcomes

1. Tiered options

Foundational / Advanced / Premium.

2. Phased flat fees

Scope → Diagnose → Implement; re-price after unknowns clear.

3. Outcome-based fees

Align price to results (e.g., portion contingent on deal closing).

4. Productized services

Standardized packages with fixed scope/price/outcome.

5. Subscriptions / portfolios

Recurring fee for defined needs (reporting, filings, etc.).

Poll #4

PRICING: EFFORT,
OUTCOME, OR BOTH?

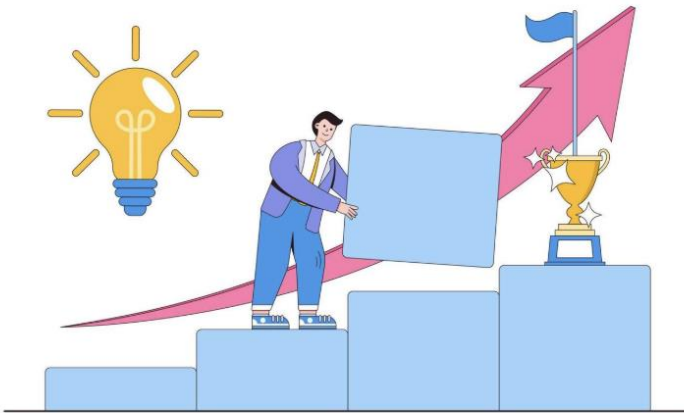


1. Which **pricing approach** does your firm use today?
 - ✓ Mostly hourly
 - ✓ Mix of hourly, flat fees, and tiered options
 - ✓ Mostly flat fees and tiered options

CLOSING + TAKEAWAYS

Advisory builds the future.

Your clients already need it – the only question is whether ***you'll deliver*** it or someone else will.



The **next generation of accountants** wants to **advise**, not be seen as number crunchers.

*Firms that invest in advisory protect not only their own **margins + talent pipeline**, but the relevance of the profession itself.*

Q&A

