

VALUE BUILDER STORY:

CPA Earns Over 120% More Per Client as a Value Builder Advisor

BACKGROUND

Beickman Advisory Group provides personalized finance consulting to individuals and businesses. More recently, they have added exit planning and value building in addition to tax management and accounting services. As the founder of Beickman Advisory Group, Bruce Beickman brings over three decades of experience helping small to medium sized business owners achieve their long term goals. Beickman has helped with over 250 company transactions both on the buyer and seller side, successfully producing a high return for his clients.

BUSINESS CHALLENGES

From 1994 -2008, Beickman Advisory group operated as a typical accounting firm and provided financial advising. In working with hundreds of clients, Beickman realized that he was doing additional business advisory and coaching, but was not charging for it. In realizing this, Beickman decided to shift his business model to also include value building and exit planning consulting. Despite having some expertise in these areas, Beickman needed a platform that was a proven coaching tool that he can use to help business owners grow and sell.

In order to provide value building consulting effectively, Beickman knew he needed to work with clients for a longer period of time. This would allow him to charge monthly installments and establish a new recurring revenue stream at Beickman Advisory Group. With a more well-rounded and valuable service for his clients, Beickman believed this would lead to a more sustainable business.

With these planned changes to his business, Beickman's main goal was to gain greater work life balance. Instead of working endless hour weeks for a long list of clients, he was interested in having fewer clients who agreed to annual commitments. With a renewed focus on delivering quality value building consulting, Beickman went on a search for an all-in-one platform that could help expand his advisory offering, while relying on a more consistent revenue source.



ADVISOR: BRUCE BEICKMAN

Type of Advisor:

Business: Accounting & Exit Planning

Number of Professionals: 4

Number of Years Established: 30+

RESULTS



Previously Beickman was charging **\$3600** a year per client. Now with The Value Builder System™, Beickman is able to charge **\$8000** a year per client, earning double his previous annual revenue.



Beickman was able to reduce his working hours while increasing his annual revenue after introducing The Value Builder System™ into his practice.

KEYWORDS

Building Credibility, Becoming the Trusted Advisor

MONETIZING VALUE BUILDER VIA
Qualifying and Engagement

WHY THE VALUE BUILDER SYSTEM™

Beickman was immediately impressed with the simple methodology The Value Builder System™ provides, as it serves as the backbone for his new value building consultancy. In discussing this, Beickman said, ***“The Value Builder System™ helped me in several ways, and it opened up my eyes to the different drivers of value. It also gave me a process or method along with the deliverables I could give to clients so that they can easily understand.”*** Now with a full grasp of the value building process, Beickman's next step was to integrate The Value Builder System™ into his current practices.

One area where Beickman has seen improvement is within what he calls his “base camp assessment”, a process used for new clients. After an initial evaluation, Beickman leverages The Value Builder Questionnaire as a test of a business's efficiency. This online questionnaire is a 15 minute assessment and upon completion by business owners, provides a detailed report on the business's strengths and weaknesses.

In a matter of a few minutes, Beickman is able to identify key aspects of the business that need improvement in order to build value and have a profitable exit. The Value Builder System™ is able to effectively bring these issues to light, giving business owners incentive to work with Beickman on a long term business plan.

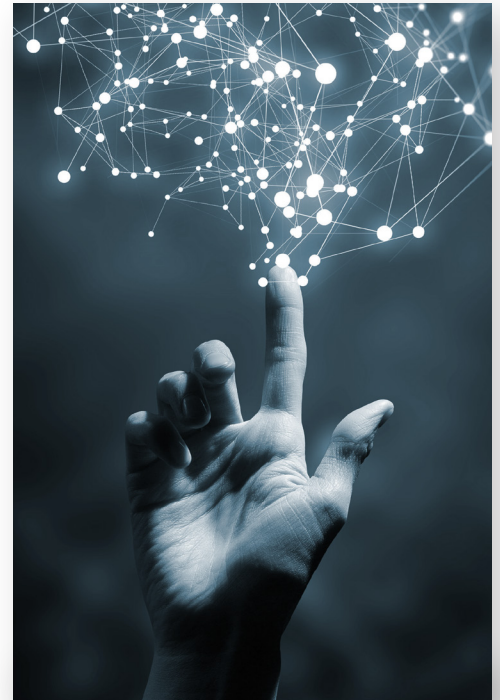
Now with a proven strategy for acquiring clients, Beickman has been able to achieve his goal of a recurring revenue stream. Working with business owners through The Value Builder System™ can take years, and in the process has enabled Beickman to charge a monthly fee. Prior to investing in The Value Builder System™, Beickman was charging \$3600 a year per client. Now, Beickman is able to charge \$8000 a year per client, earning double his previous annual revenue.

Beickman notes, ***“the higher we raised our rates, the better our clients got”***. Beickman found that by providing both accounting and value building advisory, business owners seeking help from the firm were better long term partners. This new approach has also reduced the number of total clients Beickman Advisory Group serves, but because of the new monthly fees made possible by The Value Builder System™, they are experiencing tremendous financial success.

Beickman has also seen the number of referrals they receive are on the rise. ***“We not only retained most clients, they also spread the word”***, he said. With a growing number of happy clients who are noticing improvements within their business, they gladly refer Beickman's work to others. This has helped fuel a stream of clients that they were not experiencing prior to The Value Builder System™.

RESULTS

Now with The Value Builder System™ implemented into their current processes, Beickman has been able to achieve his goal of better work life balance. Rather than working overtime for a long list of clients, Beickman now has fewer clients committed to higher annual fees. With the help of The Value Builder System™, Beickman now works 32 hour weeks, has developed stronger relationships with business owners and increased revenue in the process.



The Value Builder System™ helped me in several ways, and it opened up my eyes to the different drivers of value. It also gave me a process or method along with the deliverables I could give to clients so that they can easily understand.