

HOW TO MAKE 2016 YOUR BEST YEAR EVER

IN JUST 7 STEPS

As we approach the end of the financial year, many accountants are frantically finishing off 2014 compliance work, meeting with clients for tax planning and looking forward to a well-earned break before starting the same routine all over again in July.

It doesn't have to be that way. Consider this seven point approach, adopted by firms around Australia with three aims in mind:

1. Ensure clients are better served
2. Find opportunities for new projects
3. Set up the new financial year so that everything runs much more smoothly.

How is this possible? By using the PANALITIX integrated content and technology solution. What if you did the following between now and June 30:

1. Use the PANALITIX Learning Centre 18 Step Workflow process to plan out your 2016 work and communicate how and when it will be done to your clients, so that you take complete control over that aspect of your business
2. Learn how to price compliance work upfront and receive money upfront using our online Pricing Power training program for your whole team
3. Have each of your business clients (of the type you want to keep) complete a 30 minute online assessment of their business so that they can prioritise what needs to be done to help them achieve their goals
4. Present back to those clients an automated 20 page report with action plan, guaranteeing work for you every time you do so
5. As part of tax planning, connect your client's cloud accounting file to PANALITIX and present a three year business performance review (including estimates for the rest of the 2015 year) then create a rough plan for the next 12 months that you can monitor seamlessly on a weekly or monthly basis
6. For your non-cloud clients, enter the data required for the business performance review in just 15 minutes (this is an admin task)
7. Where appropriate, use PANALITIX's recently released cash flow forecasting module to create a three way forecast (month by month P&L, cash flow and balance sheet) in an hour or so.

These are just some of the techniques you could employ in your firm to set yourself up for a great 2016. Equally, if your biggest challenges lay elsewhere (e.g. you need more clients, or you need help building a great team, or you need to get WIP and/or debtors under control) we have leading edge video training content to help you in all of those areas and more.



PANALITIX.COM

O +61 7 3607 6600 F +61 7 3852 6642
P PO Box 1339, Fortitude Valley, Qld AU 4006
A 11/65 James Street, Fortitude Valley, Qld AU 4006
E info@panalitix.com

HOW WE CAN HELP

We have considerable expertise in delivering value added services through business advisory area.

PANALITIX is Business Advisory Software for Accountants. It helps identify, market, sell & deliver value-added services; with the added service benefits of content (methodology, learning, tools) and real support (coaching, mentoring, accountability, resources).

It's been proven, once you begin adding value, everyone will be better off - your clients, your firm and all other stakeholders. Not only will lives and businesses improve; they can be remarkable and in the process more profitable.

PANALITIX is a cloud based application (which can be used manually as well) that sits between Accountants and their clients. It's a client service and marketing tool for Accountants. It consolidates cloud Accounting data from an Accountant's client base (and all popular cloud accounting applications) into one easy to read traffic-light dashboard screen. The system will alert the Accountant if anything good or bad is happening in the key financial areas of their clients. An entire e-learning system of 'how to' content and methodology will show the Accountant what to do about the financial data they see in front of them. With PANALITIX Accountants can keep an eye on their clients' financial performance and recommend business advisory solutions to them.



Given you have downloaded this report, it's likely that you have a particular interest in delivering value based services so it's important to point out that PANALITIX includes a 120 page manual providing you with step by step processes to add a range of such services to your firm's offerings and, importantly, deliver them effectively and with panache, involving not just partners but managers and senior accountants as well.

Our purpose for existing is to positively influence lives through Accountants. We believe Accountants are the trusted advisor who can make that difference.

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E info@panalitix.com

START A FREE 14-DAY TRIAL!



VISIT [PANALITIX.COM/FREETRIAL](https://panalitix.com/freetrial) TODAY!

Find out how PANALITIX can help you:

PANALITIX helps bring meaning to numbers, forge long-lasting and sustainable relationships, save time, and create real accountability to unlock the potential in clients businesses.

- Improve client service
- Spot opportunities for new services
- Help move clients to the cloud
- Lock clients in
- View performance of every client on 1 page!
- Keep an eye on clients
- Train your team in business advisory
- Get more work with top clients
- Converse about the future rather than the past

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 E info@panalitix.com

GET IN TOUCH..



"Cloud accounting software is the future and PANALITIX takes advantage of this exciting opportunity."

CRAIG MANSELL - Business Development Manager
craig.mansell@panalitix.com // +61 7 3607 6615



"PANALITIX, enabling your team to WOW your clients with business advisory services, so you don't have to."

RYAN DEVLIN - Business Development Consultant // VIC, NT, SA, S.NZ
ryan.devlin@panalitix.com // +61 7 3607 6652



"Panalitix gives the power back to the Accountants by providing real time insights and real time opportunities. "

JACK KAY - Business Development Consultant // QLD, ACT, N.NZ
jack.kay@panalitix.com // +61 7 3607 6619



"If your business clients do not have another accountant, then you have an obligation to advise them well beyond compliance and some tax planning. If you're not actively offering business clients advisory services then should your clients just miss out or move on? You have an obligation to be better than the competition and I would love to show you how."

WENDY MILLER - Business Development Consultant // WA, NSW, TAS
wendy.miller@panalitix.com // +61 7 3607 6600



AU 1300 762 690
OTHER +61 7 3607 6600

US/CA 1-855-437-1379
FAX +61 7 3852 6642

NL +31 (0) 20 4820612

P PO Box 1339, Fortitude Valley, Qld AU 4006
A 11/65 James Street, Fortitude Valley, Qld AU 4006
E info@panalitix.com
T @panalitix

WWW.PANALITIX.COM