



CLOCKWORK

Clockwork Advisory Accelerator Cohort

Clockwork Advisory Accelerator:

Our Path Forward

Traditional accounting firms face an existential threat as AI and automation technology in general commoditize more and more accounting and compliance work. Additionally, at Clockwork we're seeing many firms getting caught flat footed, struggling to adapt as their core services become increasingly automated. Their challenge isn't just technological — it's about fundamentally reimagining their value proposition.

This is precisely why we've developed our yet to be title training or advisory excellence program. We see an unprecedented opportunity for forward-thinking firms to dramatically expand their impact by offering the strategic advisory services their clients increasingly demand. The firms that successfully navigate this transition will thrive; those that don't risk becoming obsolete.

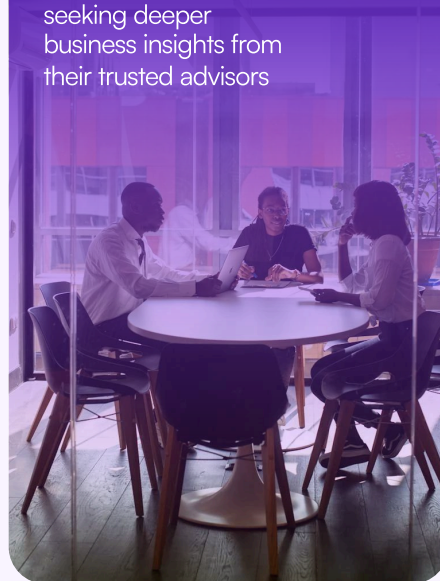
We're in the process of developing a comprehensive six week professional development program to help firms capture this opportunity. Our goal is to transform teams into indispensable strategic advisors who can future-proof their practice through high-leverage advisory services in our rapidly evolving industry.

Why This Matters Now a chicken or the egg problem

The market signals are unmistakable. When **79% of clients** are actively seeking deeper business insights from their trusted advisors, and **CAS practices are growing at a 14% median rate**, we're witnessing more than a trend — we're seeing a fundamental shift in what clients value and expect from their accounting partners. The **85% realization rate for advisory services** isn't just a metric; it's validation that the market is ready and willing to pay for strategic guidance. The firms that recognize and act on this opportunity now will **establish themselves as market leaders for the next decade**.

79%

clients are actively seeking deeper business insights from their trusted advisors



Our Philosophy

We believe successful advisory transformation happens when accountants embrace their natural strengths as financial experts while building new skills to deliver strategic insights their clients need. This isn't about abandoning what makes accounting firms valuable— it's about amplifying that value through new capabilities.

Our training builds from first principles:

1

Mastering financial storytelling:

Turning a team's existing expertise into compelling business insights that drive client action

2

Developing consultative confidence:

Moving from compliance expert to strategic advisor who shapes business decisions

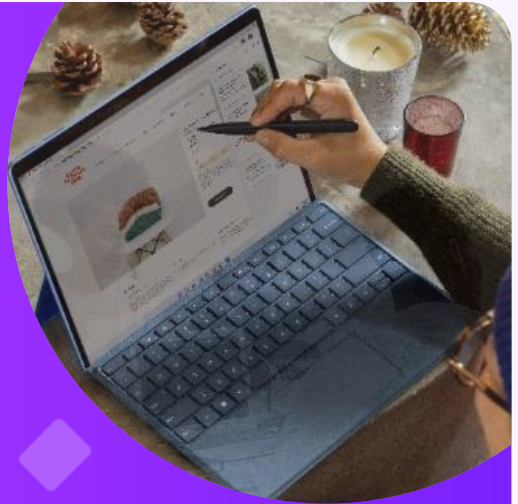
3

Creating scalable value:

Building repeatable frameworks that drive client success and firm growth

Program Structure: Week by Week

Each week builds intentionally on the last, moving from foundational concepts to practical implementation. This isn't theoretical training — it's designed for immediate application in a practice.



Week 1: The Foundation - Financial Models as Business Rosetta Stone

We begin by looking at the basics

Week 1

Problem Statement and Market Reality

Evolution of Advisory Services (2010-present)

Financial Models as Universal Language

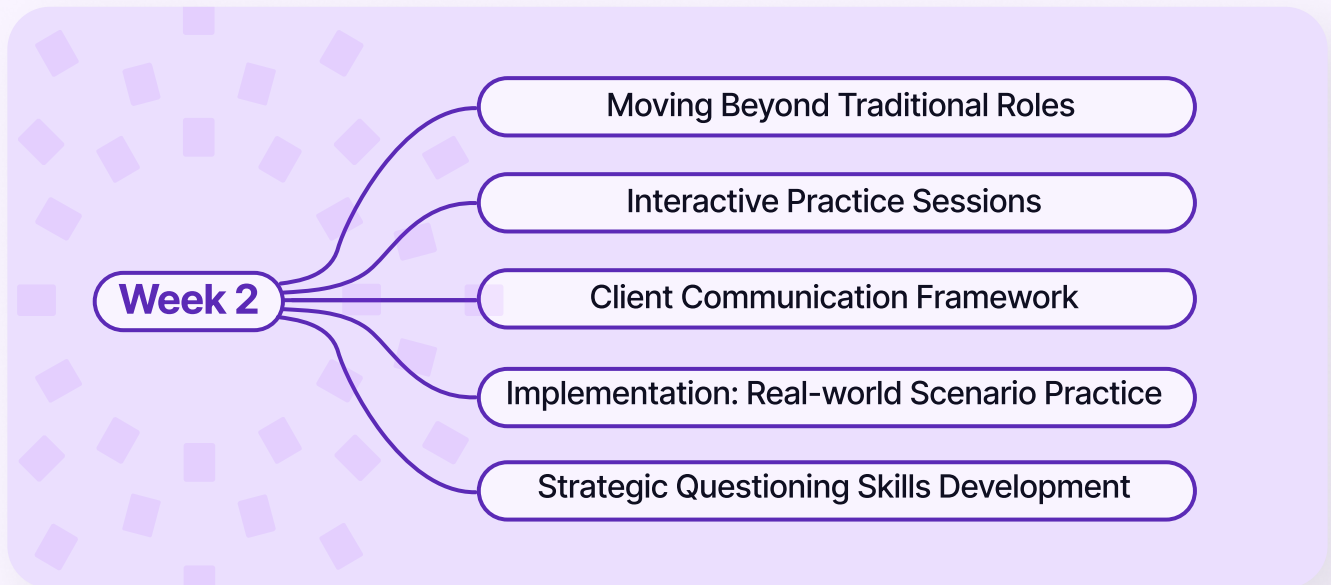
Interactive Analysis Workshop

Implementation: Hands-on Model Analysis

The first week sets the stage for everything that follows. We'll show teams how to translate their technical expertise into business insights that resonate with clients. This is about learning new financial concepts and leveraging what folks already know in more powerful ways.

Week 2: Building Advisory Confidence

Moving from technical expert to trusted advisor requires new muscles, and we'll help teams develop them systematically:



During this week, we transform how a team thinks about client interactions. The shift from reactive reporting to proactive guidance isn't just semantic— it's the foundation of high-value advisory relationships.

Week 3: Pricing and Packaging

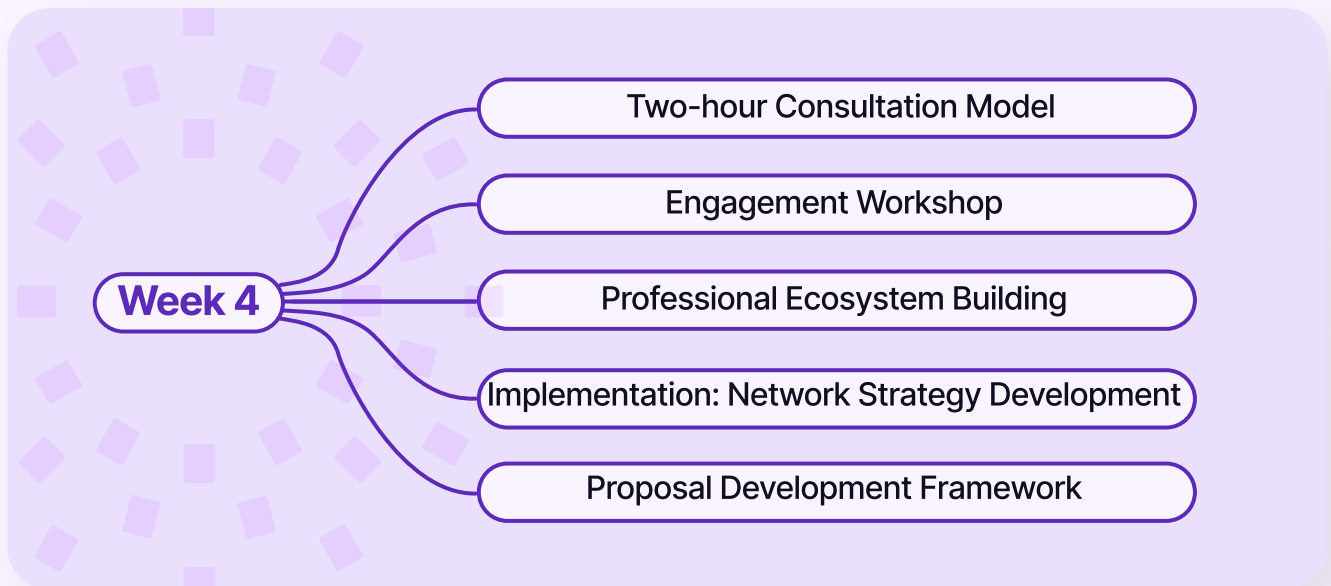
This is where theory meets reality. We tackle the mechanics of monetizing advisory services effectively:



By week's end, folks should have concrete service packages ready to take to market, with pricing strategies that reflect the true value of their advisory insights.

Week 4: Client Engagement and Acquisition

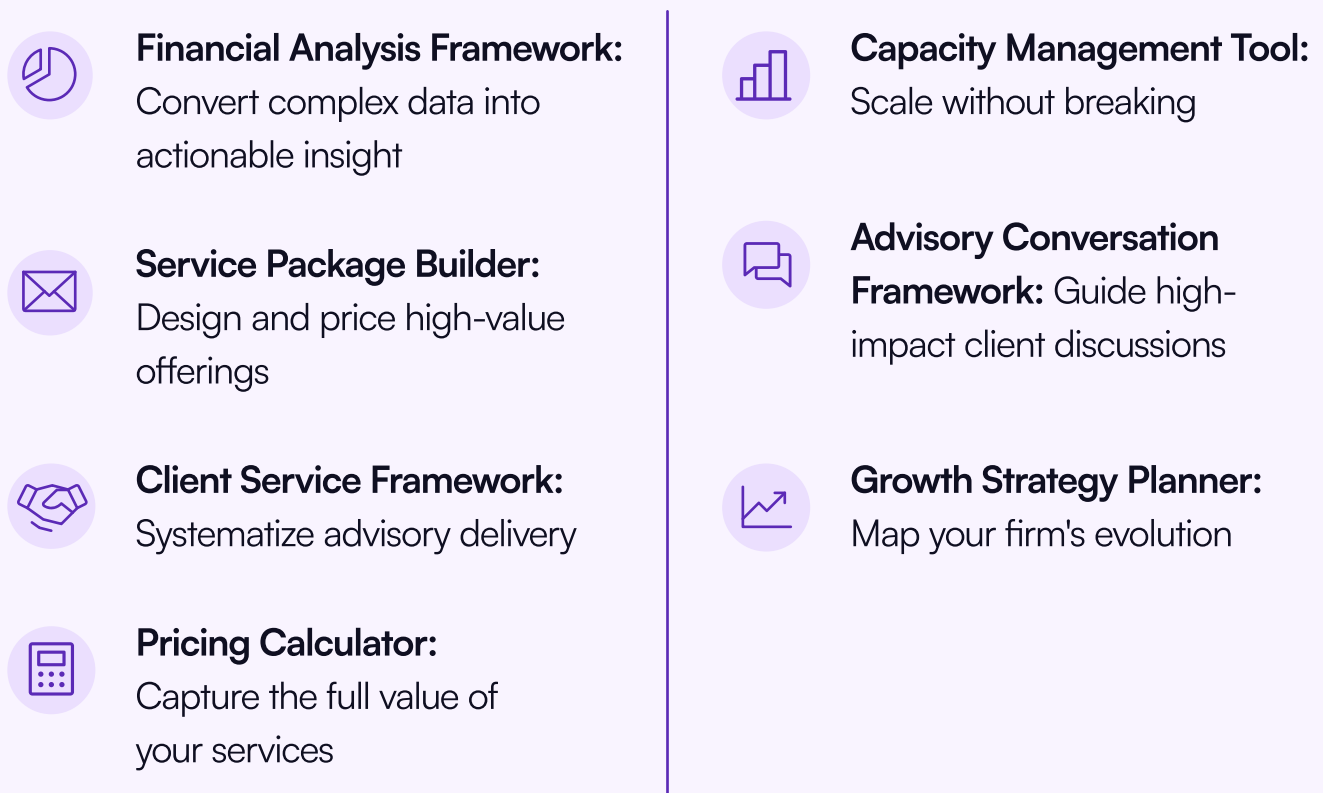
Now we focus on systematizing client relationships and scaling your impact:



This week transforms how a firm approaches business development, moving from opportunistic to systematic client acquisition.

Core Resources and Tools

Every participant receives our battle-tested implementation toolkit:





CLOCKWORK

Clockwork Advisory Excellence Program

Ready to enroll?

Send us an email to get started!



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