



**ATL Network**  
ADVISORY THOUGHT LEADERSHIP

**Practitioner Panel**  
**Providing a Board Advisory Service**



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# Chair



Colin Simkin  
Partner

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## Practitioner Panel



Warwick Cavell  
ATL  
Network



Peter Mogg  
Mogg Osborne  
Accountants



Michael Wilson  
Wilson  
Business Services



## What we will cover

Our panel of accounting practitioners will share their experiences in providing a Board advisory service to their clients.



# 1. Practice overview

Please provide a brief outline your practice – size, location, type of clients and main services etc.

In particular, please describe your board or advisory board services.



## 2. Governance framework

Please describe the governance framework i.e. whose involved, meeting policies, meeting frequency, how you structure and organise your meetings.

What is the frequency of meetings, do you have a standard agenda and what is your role.



### 3. Client Value

What is the main value your clients obtain from board meetings/advisory board meetings?





## 4. Fees

From a fees perspective can you share details of your fee model you apply?



## 5. Preparation / Resources

What preparation work is required by your firm and how do you resource this?



## 6. Board Advisory Champion

Who drives this service offering within your practice? Are other partners / senior staff involved?



## 7. Service awareness / positioning

How did you go about introducing your Board advisory to your clients?

How do you position this service with prospective clients?

Do you actively promote to selected clients?

Do you target new clients with this service?



## 8. Growth area

Is this a growing area of your practice?



## 9. Lessons learned

What mistakes have you made along the way and how would you propose avoiding these in the future?



## 10. Recommendations

What recommendations would you provide to other practitioners who are contemplating providing this service for their clients?





## Online CFO Advisory Toolkit

- 3 Module program:  
Videos, Notes, Templates, Worksheets
- Available today

[www.atlnetwork.com.au](http://www.atlnetwork.com.au)



# Thank you



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