

## Developing More Strategic Partnerships with Clients

### Business Need

A State and Local Tax Practice wanted to move beyond their principal role of offering technical tax expertise to becoming full service business consultants. With the internet quickly becoming a resource for tax ideas, the practice was concerned that their business would suffer if they did not elevate their consulting practices. These partners and senior level managers needed to move "out of their client's file room and into the board room."

### Goal

The goal was to differentiate themselves from their competition by becoming experts in implementation of tax advice. To achieve this goal they needed to arm their consultants with skills and tools that would enable them to develop more strategic partnerships with their clients. Specifically, they wanted their consultants to:

- Understand their client's business strategy, key issues and operations, allowing them to have conversations with high-level executives
- Make appropriate recommendations based on their conversations with clients
- Follow through on recommendations

### Solution

Advance Consulting worked closely with the client's senior leader to develop a specialized developmental academy consisting of multimedia study, classroom learning and simulations. A group of high performing consultants participated in a three-part, modularized program over an 18-month period. Module I included a customized, expanded version of The Consultative Approach Workshop, in which the consultants engaged in a four-day interactive analysis on how their clients operate from an in-depth process and financial perspective. Building on these insights and skills, the consultants then took part in a live client simulation to conduct comprehensive client conversations and data gathering interviews.

Modules II and III were designed to develop knowledge and skills in the areas of current business trends, technology, implementation and change management. Action learning activities, including Harvard Business Case Studies, book readings, and client reviews were conducted throughout this time period.

### Results

Academy Participants Report that they are:

- Better able to penetrate accounts--resulting in adding approximately \$2 million to their pipeline.
- Perceived as adding greater business value to clients resulting in more long-term projects.
- More comfortable and effective at leading discussions with senior level executives from Finance, Operations and Information Services.

Improved in their ability to speak in both tax and business terms and have increased credibility with clients