

Financial Awareness Coaching – Outline

Why we developed this service?

The better you understand your business, the easier it will be to make more money. If you want to improve your business performance, then we can work with you to set strategies to achieve your goals. We believe that dedicating time to work on your business rather than in your business will take it to a new level.

Who should attend?

If you are passionate about your operation and want to better understand your numbers and be able to answer questions like:

- How much profit have you made this year?
- Is your cash level increasing or decreasing?
- What is affecting your cash level?

What is involved?

You will attend meetings with us every two months to discuss your financial results. The series will progress as we move through the year. We will

1. Assess your actual financial reports as they exist
2. Format your financial reports in a way that is useful to you
3. Get you to understand the numbers and the financial reports better
4. Identify your burning issues
5. Set strategies to improve your business performance and achieve your goals
6. Set operational goals and targets – turning these into a budget/forecast (numbers)
7. Measure actual performance against the budget/forecast

When should I have a session?

Anytime is a good time to start working on your business and improve business performance. The sooner you start financial awareness coaching the better your understanding of business results and their implications and the more control you will have over outcomes.

Call Quay Accountants on 07 308 4414 (Whakatane) or 07 578 6069 (Tauranga) to discuss Financial Awareness Coaching for you



Benefits of Financial Awareness Coaching

- It will enable you to understand your business better
- You will have informed decision-making
- You will develop strategies and actions to increase profitability and cashflow
- It will keep you accountable for the goals and actions you set, so that you achieve the goals that are set
- You will have customised reports to ensure the right information is being provided in a format that makes decision-making easier
- Every two months you will participate in one-on-one meetings to review your reports and record actions that need to be achieved before the next meeting
- You will measure your actual performance against the budget/forecast on a two monthly basis
- It will prepare you for Management Accounting as you will gain a good understanding of your financial statements
- It will help you identify what are your burning issues
- You will have access to collective wisdom of Quay Accountants; its systems, products and services
- You can make unlimited 10 minute phone calls to address any burning issues between meeting