ADVISORY AMPLIFIED

ADVISORY AMPLIFIED Tour



WORKBOOK

RALEIGH NASHVILLE MINNEAPOLIS BOULDER PHOENIX SEATTLE

WELCOME TO ADVISORY AMPLIFIED 2026

We're so grateful you decided to spend the day with us.
This tour was built to move advisory from talk to action. Each of today's sessions include a worksheet built by the speaker to help you apply what you're learning to your firm. You'll leave each one with the beginnings of a plan you can put to work.

Consider this workbook your tour companion. Take notes while the sessions are fresh, work through the activities with the people around you, and use these pages to capture the ideas that come out of the day.

Inside you'll also find a QR code that opens The Resource Playlist, which is our digital vault of templates and resources, built to support you as you put these ideas into practice.

WHAT HAPPENS ON THE TOUR DOESN'T STAY ON THE TOUR

We still hear from firms working off the plans they made at last year's tour, and this workbook is built to do the same for you.

Bring it home with you, along with the conversations, the relationships, and the momentum you built today.

And before you leave, write down one change you want to make in the next month. Use these pages to hold yourself to it.

Here's to the day ahead,

The Advisory Amplified Team



Advisory is the future
of this profession

LET'S MAKE SOME NOISE TOGETHER.

Advisory Amplified is the brainchild of Fearless Foundry, brought to you alongside a handful of partners and collaborators who care deeply about the future of the accounting profession.

We're here because we wanted to put a different kind of event on the calendar. One about coming together as a community, learning something, and actually getting somewhere. One that's fun, too. The kind of day that feels like a good gig, not like sitting inside a LinkedIn post.

You're here because you've got goals and ambitions for your firm, and advisory is part of how you get there.

Underneath everything today is one question, and it's yours to answer: what kind of firm do you actually want to build?

It's a question that's hard to make room for in the day-to-day. So today is built to give you that room. You're surrounded by people doing the same work, some years into it, some right at the start, with partners who know this landscape on hand and in the mix. Time to step back and ask where you really want to take this.

However far along you are, you're in the right place.
And we're really glad you came.

Madeline Reeves

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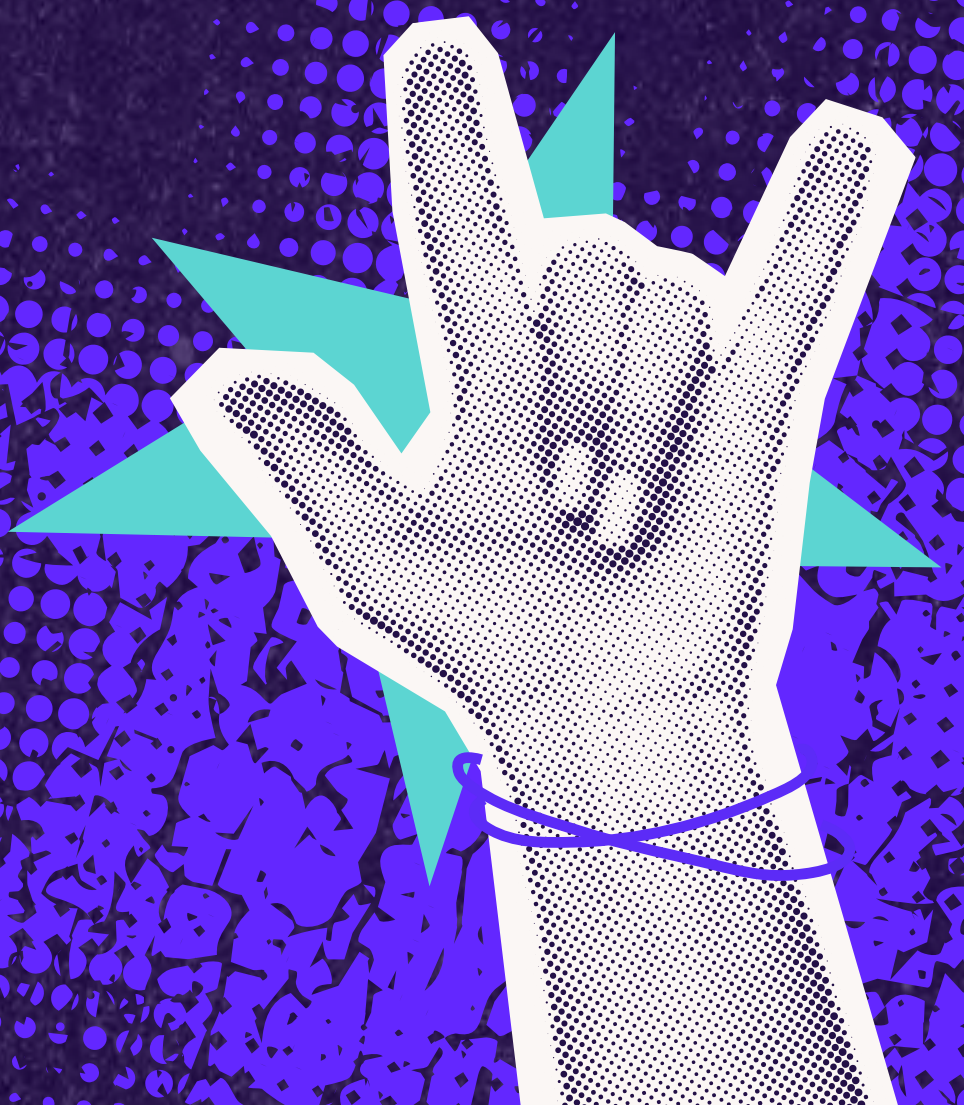

BILLABLE BY DAY
ROCKSTAR

SESSION 01

The Practice Audit: Finding the Right Balance Between People and AI

TYLER PALMERTON (RALEIGH, NASHVILLE, MINNEAPOLIS)
RYAN DONATO (BOULDER)
ZACH GREENWALD (PHOENIX)
MITCH WARD (SEATTLE)

The fear about AI is that automating the work means automating yourself out of a job. The opposite is true. A system takes the reactive work, the approval-chasing, the after-the-fact reconciling, the data you compile by hand. What it leaves you is the judgment and the client relationships only you can provide. That's the work that makes you harder to replace, not easier. The catch is that in an ordinary week it's tangled up with everything else, and you can't redirect time you can't see. So this session gives you a way to separate it, sorting each task by whether a system could run it, guide it, or whether it genuinely needs you.



Expensify

THE PRACTICE AUDIT: WORKSHOP

Choose the workflow that most closely mirrors your current practice. You'll spend the rest of this exercise going deep on one, not all of them. Tick one box, then turn the page.

SELECT YOUR WORKFLOW

- [ ] **EXPENSE APPROVALS**
  Routing, chasing, and manually approving routine spend items
- [ ] **MONTH-END RECONCILIATION**
  Matching transactions, identifying discrepancies, closing the books
- [ ] **CLIENT REPORTING**
  Preparing and delivering financial summaries to clients
- [ ] **ANOMALY REVIEW**
  Identifying unusual transactions or spend patterns
- [ ] **DATA PULLS**
  Extracting and compiling spend or financial data for review
- [ ] **OTHER**
  Bring a workflow from your own practice



AUDIT YOUR WORKFLOW

Using the three categories below, sort the key steps of the workflow you choose into columns, adding rows as needed.

FULLY AUTOMATABLE	SYSTEM-GUIDED	HUMAN-ESSENTIAL
A system can own this step entirely	AI surfaces it; a human decides	Judgment, relationship, or context required

MY WORKFLOW

FULLY AUTOMATABLE	SYSTEM-GUIDED	HUMAN-ESSENTIAL

FIND THE FRICTION

Where in your current workflows do approvals or reviews slow things down most?

Where are you manually doing something that already exists in your data—you just can't see it yet?

COMMIT TO ONE CHANGE

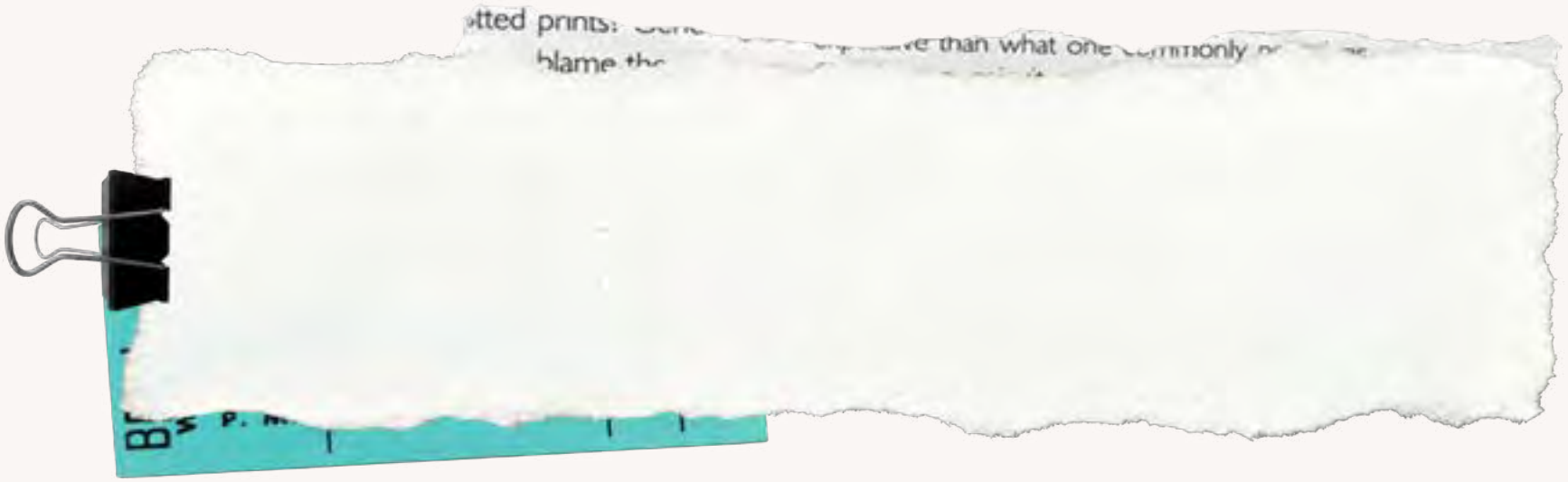
Now that you've mapped and audited your workflow, it's time to act on it. Answer:

01 What I'll automate, delegate, or redesign

02 What success looks like in 30 days

MY NEXT STEP, BEFORE I LEAVE THIS ROOM:

Write down one or two lines committing to a specific action to help make your workflow more efficient.



My notes

SESSION 02

How to Use AI to go from Doer to Advisor

LOGAN KIELLER (RALEIGH, NASHVILLE, BOULDER)
BEN JOHNSON (MINNEAPOLIS, PHOENIX, SEATTLE)
JOINED BY JOSH SCHNEIDER, CEO OF MULTIPLY ADVISORS

The problem with AI in most firms isn't awareness, it's application. The advice tends to stop at "start experimenting", when what you need is a tested use case you could run this month. The capacity for advisory work already exists inside your firm, but it disappears into the prep those advisory conversations require. Hand that to an AI agent and you free the people trained to deliver clean books to move up in stages, from doing the books, to reviewing the work, to advising the client. In this session, we build one of these agents live, so you can see exactly how it runs inside a real firm.



Kick

HOW TO USE AI TO GO FROM DOER TO ADVISOR

You don't need to redesign your firm to get value from AI. Start by looking at the work already happening around you. Over the next few pages, you'll identify repetitive tasks, recurring client requests, and services you'd like to offer, then choose an opportunity to turn it into an AI agent you can start building today.

WHAT IS TAKING UP YOUR TIME?

List the manual or repetitive work you or your team complete regularly.

Example:

Transaction review, client follow-up, preparing reports, month-end review, meeting prep, researching client questions, pulling information from multiple systems.

WHAT ARE YOUR CLIENTS ASKING FOR?

List the questions, reports, or deliverables clients regularly ask for that take time or are difficult to provide.

Example:
Why did profit change? Where are we overspending? How are we doing compared to last year? Can you build me a forecast? What should I be paying attention to? Are there any tax-saving opportunities?

WHAT WOULD YOU DO IF YOU HAD MORE TIME?

List the things you would like to provide more consistently to improve your clients' experience or help them make better decisions.

Example:
Management reports, proactive client updates, KPI reporting, cash-flow insights, benchmarking, tax planning, meeting preparation, advisory recommendations, more frequent client conversation.

WHAT COULD YOUR FIRST AGENT DO?

Look back at the ideas you wrote down. Choose one that would save meaningful time or help you provide better service.

MY FIRST AGENT COULD: _____

_____

OR START WITH ONE OF THESE:

- ☐ Prepare for client meetings
- ☐ Review monthly financials and flag changes
- ☐ Draft management reports
- ☐ Answer recurring client questions
- ☐ Identify advisory opportunities
- ☐ Benchmark clients
- ☐ Surface tax-planning opportunities
- ☐ Draft proactive client updates
- ☐ Other: _____



IF YOU'RE GETTING STARTED
WITH AI, SCAN BELOW.



My notes

SESSION 03

How to Build a Profitable Advisory Model Around Your Ideal Clients

RICHARD FRANCIS, FCA

Plenty of firms decide to do more advisory and then take whoever comes through the door, which is how you end up busy, underpaid, and pouring your best hours into clients who were never a fit. Richard Francis has built two advisory practices over 30 years, and what he's found is that advisory turns profitable when you get clear on who it's for, not when you simply stack more services on top. This session is built around your Ideal Client Profile, the specific kind of client your firm is set up to serve well. You can't name that until you're clear on why you're doing advisory in the first place, since those reasons, commercial and personal, are what point you to the right clients. With benchmark data from 1,200 firms behind him, Richard walks you to that profile. You'll leave having defined your own ideal client, and with accountability in place to stop you from drifting back to serving everyone.



spotlight reporting

HOW TO BUILD A PROFITABLE ADVISORY MODEL AROUND YOUR IDEAL CLIENTS

Capture key ideas, decisions and actions as you build your client Advisory Services.

DEFINE YOUR 'WHY?'

Establish a clear purpose for your practice by identifying what success looks like and why it matters. Your "why" should guide every strategic decision, from the clients you serve to the services you offer.

YOUR PERSONAL 'WHY?'

Clarify what motivates you and the personal impact you want to make.

YOUR PROFESSIONAL / FIRM / PRACTICE 'WHY?'

Define your firm's purpose, the value you create, and the impact you want to have on your clients.

REVENUE TARGET ACCOUNTABILITY: CAS V COMPLIANCE

Set clear revenue targets for advisory (CAS) and compliance services to ensure your firm intentionally shifts towards higher-value work. Tracking this balance helps keep your team accountable and aligned with your long-term strategy rather than defaulting back to compliance.

SERVICE AREA	CURRENT %	TARGET % (1 YEAR)	TARGET % (3 YEARS)
CAS / Advisory			
Compliance			

DEFINE YOUR IDEAL CLIENT PROFILES (ICPs)

Identify the types or industries of prospects or clients you want to attract, serve, and grow with. Focus on those who will gain the greatest value from your CAS offering and/or whom you are most interested in doing work for.

Our (ICPs) Are / Will Be: *(For prospect ICPs)*

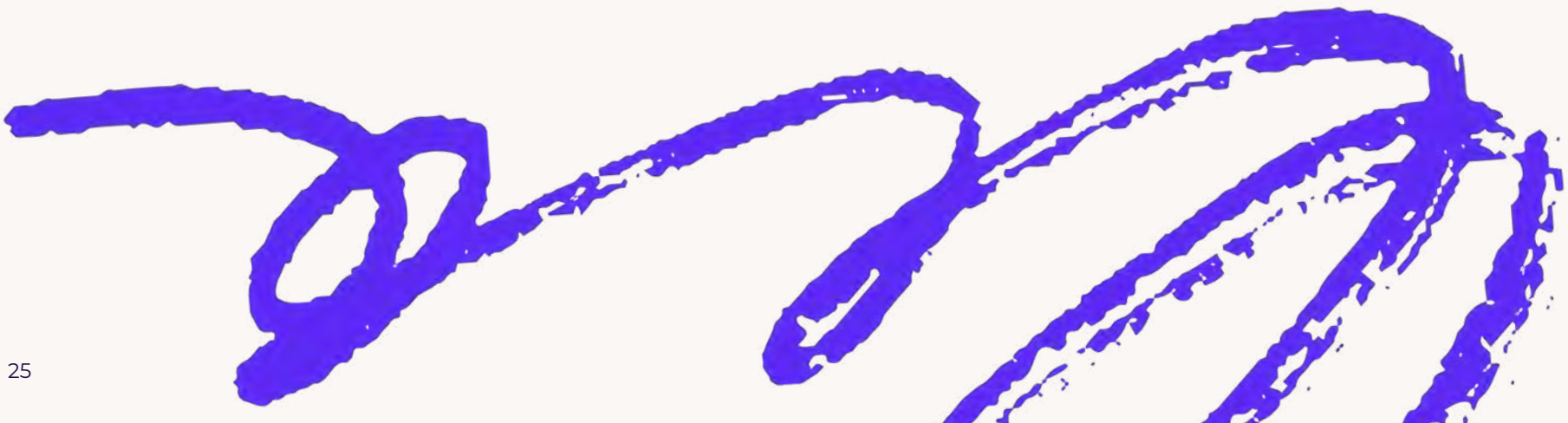
01

02

03

04

05



ADVISORY CADENCE

How often and how will you engage with premium CAS clients? What does their experience look like?

DESIGN YOUR CAS DEPLOYMENT MODEL

How will prospects and existing clients be introduced to your CAS offering? Create a structured plan for how you'll deliver Client Advisory Services across your firm, including your service offerings, people, processes, technology, and pricing. A well-designed model ensures your advisory services are scalable, consistent, and profitable.

Identification for CAS:

Engagement Methods:

CAS Cadences:

KEY TAKEAWAY ACTIONS

What are the three most important actions you will take following this workshop?

ACTION 01

ACTION 02

ACTION 03

My notes

Did you know Advisory Amplified is brought to you by Fearless Foundry?

Headed up by Madeline Reeves, Fearless Foundry is a creative collective specializing in brand experience at the intersection of people, technology, and finance. Having spent years on the accounting circuit, both as attendees and creatives working closely with firms and fintech partners, we saw the opportunity to bring the two together in a more personal and meaningful way. Events have been getting bigger and pricier, but we kept hearing people tell us they were leaving without an action plan. So we saw an opportunity for a different kind of experience. We designed a smaller, roadshow-style event instead—capped attendance, a curated list of partners, and enough space in the day for good, collaborative conversation. Our partners aren't vendors here. They're in the room as speakers, alongside firm leaders and other voices from the profession, sharing what they're seeing across the industry. We believe in advisory's future, and in building it together instead of alone.




FOR
ADMIT ONE
Audit
For the change-makers.
Audit the Status Quo

SESSION 04

Cashflow Is the Advisory Product

LYNNETTE OSS CONNELL

Cash flow is the thing your clients worry about most, and helping them with it is advisory work, even when it happens informally and off the clock. This session is about turning that into something deliberate, a service you structure, schedule, and charge for. It splits the work into three parts. There's reporting what already happened (the Past) and planning the fix for what's next (the Future), both of which most firms do comfortably. The part that gets skipped is the middle, sitting with a client and asking what's actually driving the pressure right now (the Present). That's where the coaching happens, and it's where the value has been hiding.



Relay

CASH FLOW IS THE ADVISORY PRODUCT

You're already doing this. NOW OWN IT.

Think about the last time a client texted you a money question between meetings, “can I afford this hire?” or “should I be worried about next month?” You dropped what you were doing and talked them through it. That’s cash flow advisory, and you’re already doing the work. Over the next few pages, we’re going to take that conversation back: name it, find the one real client who needs it most, and build it into something scheduled you can stand behind. You’ll leave with one client and a plan to deliver cash flow advisory.

WHO'S EVER GOTTEN THE PANIC TEXT?

The client who can't make payroll, or a bill they weren't ready for.

These calls burn us out because they happen on the fly, on the client’s panic, for free. Owning the conversation—building it in, scheduling it, getting paid for it—is how you take back control.

WHERE DO YOU SPEND MOST OF YOUR CLIENT TIME?



- ☐ Past (reporting what happened)
- ☐ Present (asking what’s going on)
- ☐ Future (planning what’s next)

PICK ONE CLIENT. MAP THE GAP.

Don't think about your whole book. Think about one client—the one who's a little stressed about money, even if neither of you has called it that.

PAST

The scramble. What happened? (3– 5 words)

Eg. David overspent on AV and missed Payroll

PRESENT

What do I need to ask right now to uncover what's driving them, where the stress is, and earn buy-in?

What made the AV feel urgent?

What would peace of mind look like for you to make these decisions?

FUTURE

The fix. Where do they need to go?

Separate payroll account + savings buffer + weekly cadence

YOUR CLIENT:

YOUR QUESTIONS:

YOUR FIX:



ASK YOUR WAY TO THE FIX.

Before jumping straight to the solution, stay with your client in the Present. When you **Ask Your Way to the Fix**, you surface what truly matters to them—their vision, values, and priorities. Use these questions to build deep buy-in and tailor a solution that creates lasting impact.

Vision Questions

Focus on future states, hidden aspirations, and life after the problem is solved.

"When you picture _____ never being a scramble again, what would that free you up to focus on?"
"If _____ was running on autopilot, what would your ideal week look like?"
"What big goal are you putting off because _____ keeps pulling you into the weeds?"

Values Questions

Focus on risk tolerance, emotional peace of mind, boundaries, and underlying drivers.

"If we _____, what would you finally feel okay saying yes to?"
"As we fix _____, what's the one thing about your business we must protect at all costs?"
"When making a change like this, what safeguards help you sleep best at night?

Priorities Questions

Focus on sequencing, trade-offs, urgency, and high-leverage quick wins.

"Of everything we've talked about, which worry would you most want off your plate first?"
*"If you could only solve **one** of these financial bottlenecks this quarter, which one gives you the highest return on your sanity?"*
"Looking at all the competing projects on your radar, which single issue—if fixed today—creates the biggest positive domino effect for the rest of your business?"

NOW IT'S YOUR TURN:

Write the one question that you think would help open your client up? Feel free to adapt from questions above.

YOU'RE ALREADY DOING THIS. NOW OWN IT.

A repeatable 5-step flow to run the conversation with your clients.

01 NAME WHAT YOU SEE: Here's what I'm noticing in your cash lately...

02 ASK, DON'T TELL: What's that been like for you? What's worrying you?

03 SURFACE THE COST: If this keeps going, here's what it could mean by [date].

04 LET THEM DECIDE: What do you want to do about it?

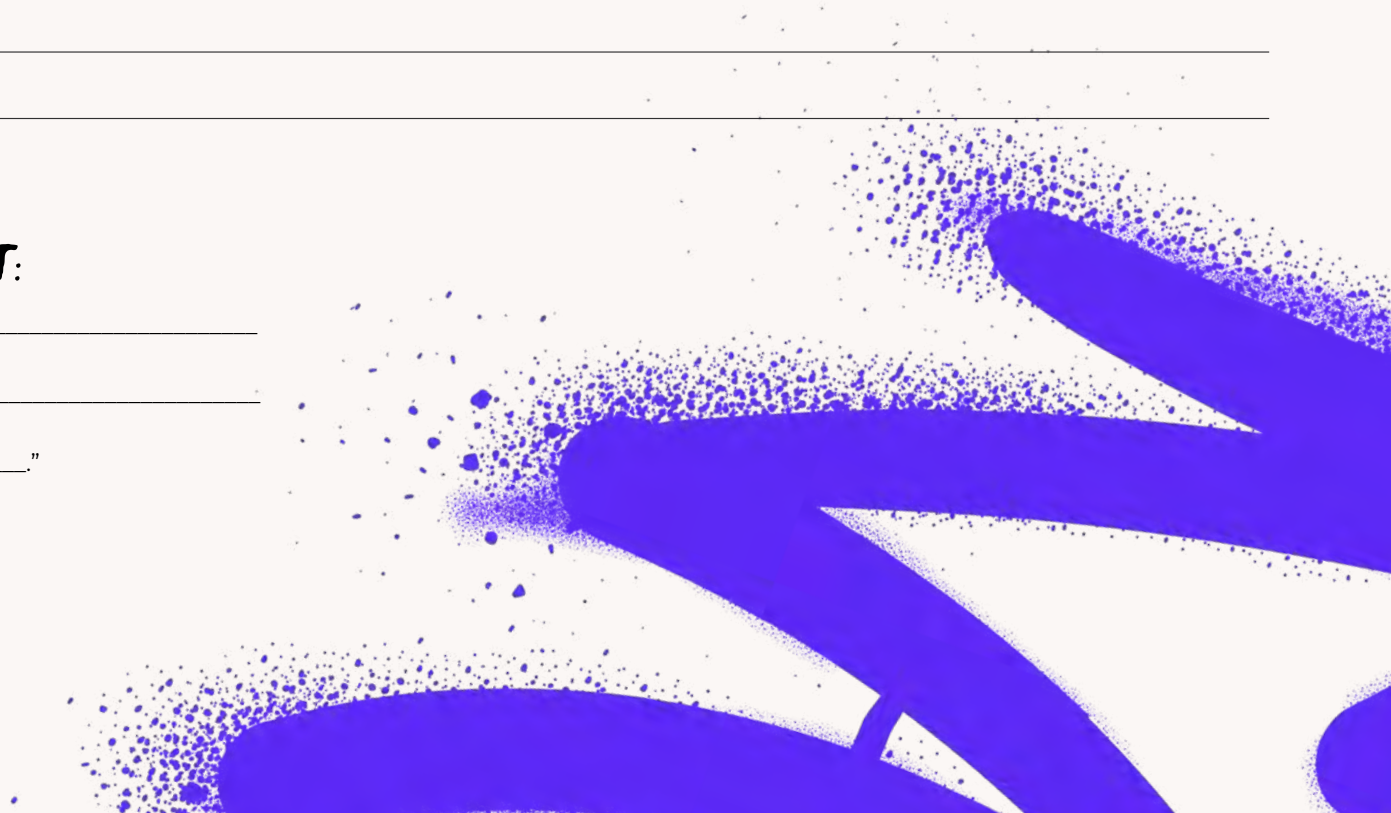
05 SCHEDULE THE NEXT ONE: Let's make this a standing check-in.

YOUR COMMITMENT:

"I'm going to talk to _____

about _____

by _____."





My notes



SESSION 05

Moving Change Forward in Your Firm

VALERIE HECKMAN

Change is hard, and getting other people to change is harder. Moving clients onto better tools, shifting your team toward higher-value work, dropping processes that have outlived their use–the plan is rarely the problem. The problem is that people resist it, because they're usually more comfortable with what they already know. In this session, Valerie Heckman draws on how technology companies think about product adoption, and applies it to getting your team and your clients on board. Some forces pull people toward a change, others hold them back, and learning to work with both is what makes a change actually take hold.



onpay

MOVING CHANGE FORWARD IN YOUR FIRM



Think about a technology implementation or process change you plan to lead in your firm. As you move through these exercises, start by capturing your own perspective on The Four Forces Driving Adoption, then use what you discover to prepare for conversations with your team.

Not currently leading a team? Think about the colleagues or decision-makers you'll need to collaborate with to make the change successful.

Solo practitioner? Consider asking a trusted peer, mentor, or other collaborator to help you challenge your thinking as you plan for a change.

CHOOSE YOUR CHANGE

What technology or process change would you like to implement in your firm?

Who will be most impacted?

EXPLORE THE FOUR FORCES

Use your chosen change to complete each section.

01 PUSH

What isn't working anymore about the current way?

02 PULL

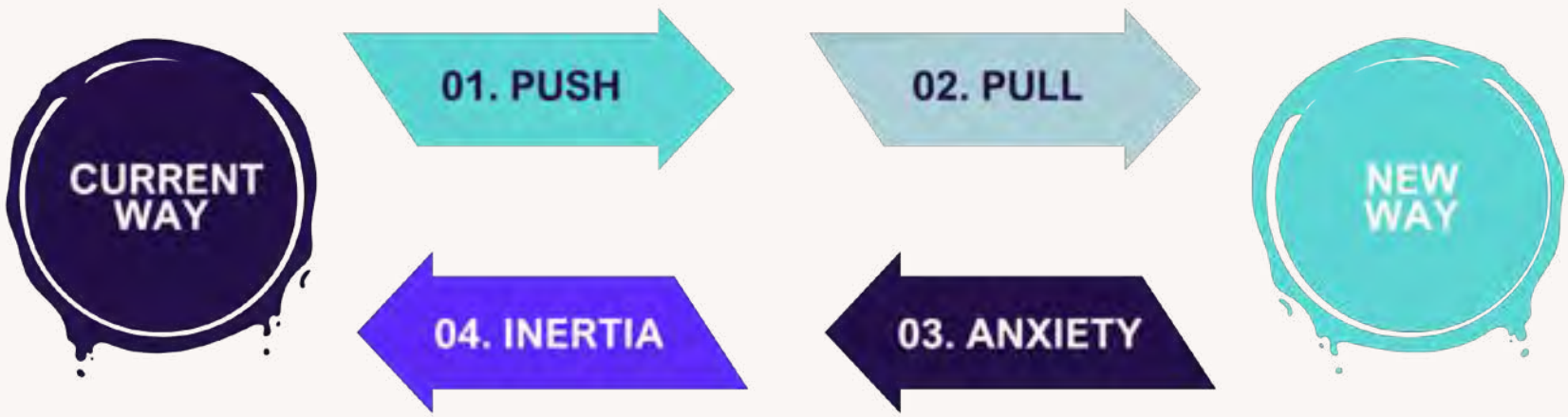
What is driving you toward change?

03 ANXIETY

What worries you about the change?

04 INERTIA

What may hold you back?



Source: Progress Making Forces diagram, Bob Moesta & Chris Spiek

SHAPE THE CONVERSATION

The Four Forces are most valuable when discussed with others. Brainstorm open-ended questions for each force that will help you explore your team's perspectives.

01 To better understand why change is needed...

02 To better understand what people hope to gain...

03 To better understand concerns and uncertainties...

04 To better understand practical barriers...

MOVE CHANGE FORWARD

Return to this page after you have explored The Four Forces with others. Reflect on what you learned and how it will influence your approach.

01 One thing that changed my thinking:

02 One thing I will do before implementing this change:

03 To help the change move forward, I will:

04 I want my team to feel:

My notes

SESSION 06

Implementing a Foolproof Hiring Framework for Your Firm

OWEN PITTMAN (RALEIGH, MINNEAPOLIS, PHOENIX)
CALEB JOHNSON (NASHVILLE, BOULDER, SEATTLE)

For most firms, hiring comes down to a good feeling in the room, but a good feeling is not a guarantee of a good hire. The next person you hire might be across the desk or on the other side of the world. Either way, you have the same problem—knowing whether they're any good before you hand them real work. Caleb Johnson and Owen Pittman have run hundreds of interviews and built teams for more than 40 firms, and they've found that the firms with high retention are those who interview, vet, and onboard using a repeatable system rather than relying on instinct.



CAS

BUILD YOUR FOOLPROOF HIRING FRAMEWORK:

A Vet / Interview / Onboard Worksheet

Be honest for a second. Think about your last bad hire. The one who interviewed like a dream and quietly came apart by week three. That was not bad luck. That was a process with a hole in it, one you never got the chance to see. These pages are how you find the holes and close them. Over the next few minutes, you are going to build the bones of a hiring framework you can actually repeat. Nobody is grading this. Write the ugly truth. That is where the good stuff lives.

THE AUTOPSY

01
SHORT ANSWER:

_____

_____

_____

02
SHORT ANSWER:

_____

_____

_____

03

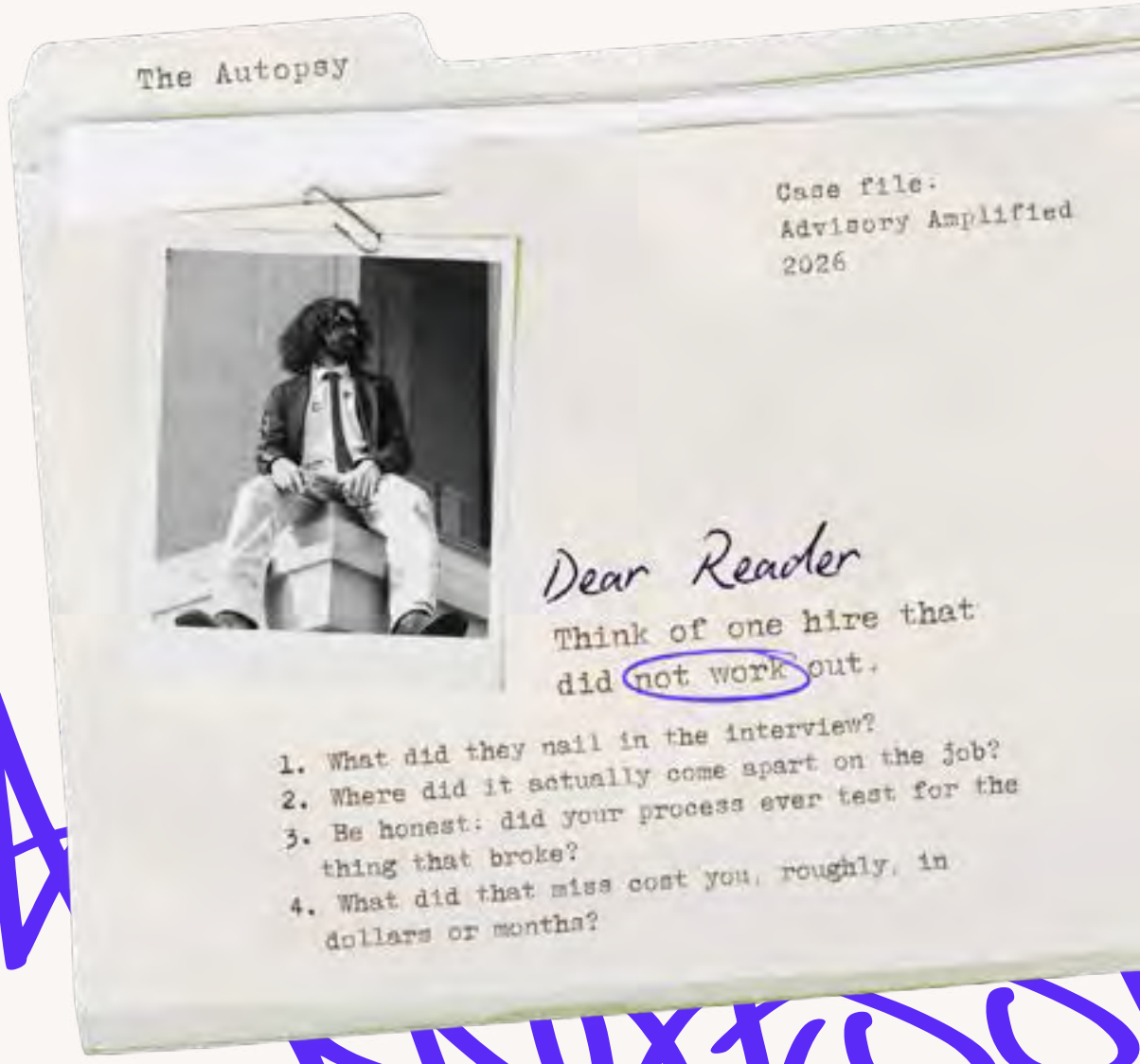
☐ YES ☐ NO

04
SHORT ANSWER:

_____

_____

_____



VET: BUILD YOUR ONE-PAGE SCORECARD

Before you ever interview, define “good.”

LIST THE 5 TRAITS A GREAT HIRE IN THIS ROLE ACTUALLY NEEDS.

WRITE HOW YOU WOULD SCORE IT 1 TO 5.

TRAIT	WHAT DOES A 5 LOOK LIKE VERSUS A 2?
01	
02	
03	
04	
05	

CIRCLE THE TWO TRAITS YOU HAVE NEVER ONCE FORMALLY SCREENED FOR.

INTERVIEW: SEE THE WORK, NOT THE CHARISMA

PICK 3 QUESTIONS FROM THE PROVIDED QUESTION BANK THAT FIT YOUR FIRM.

MY 3 CHOICES:

01 _____

02 _____

03 _____

WRITE ONE SMALL WORK SAMPLE YOU COULD ASK A CANDIDATE TO DO LIVE IN 15 MINUTES.

_____

_____

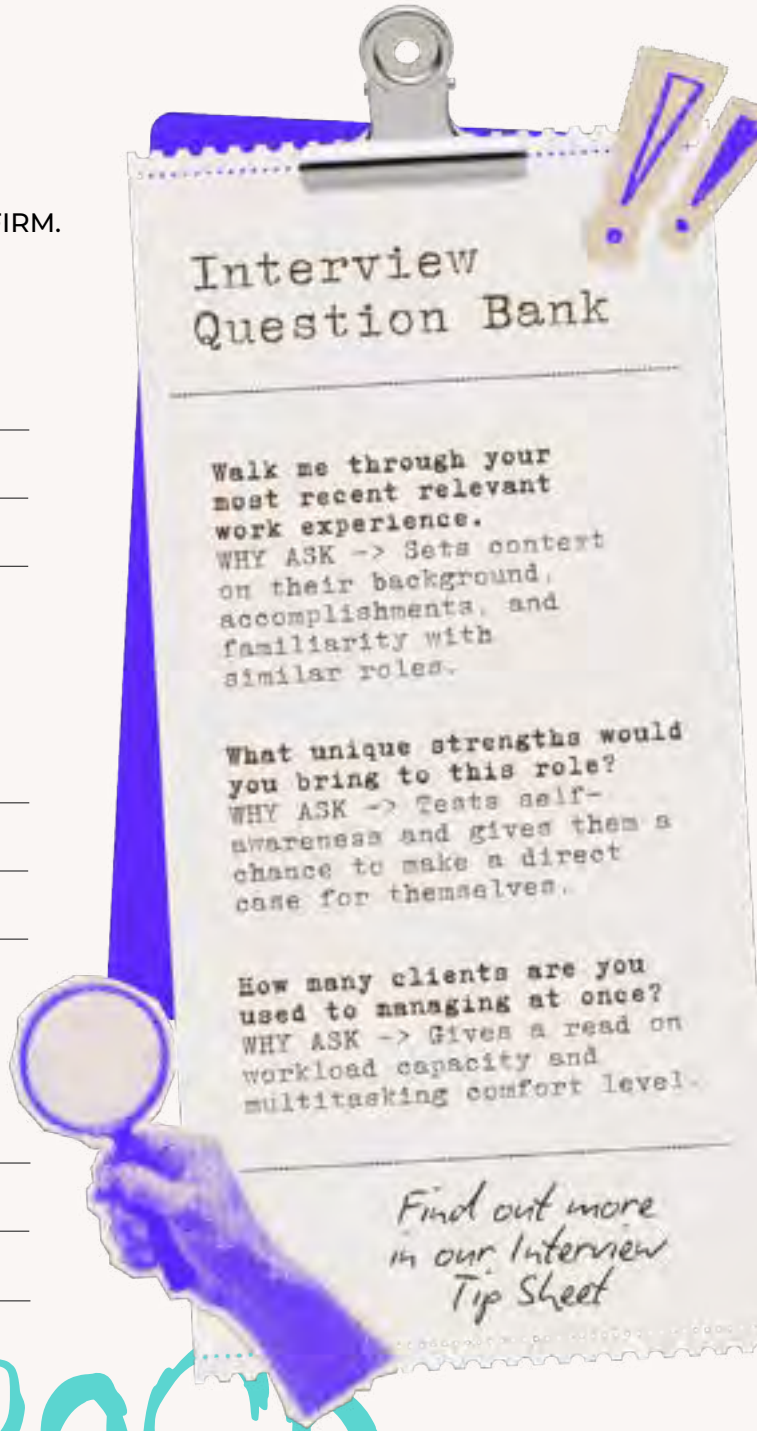
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WHAT WOULD A GREAT ANSWER SHOW YOU THAT A REHEARSED ANSWER WOULD NOT?

_____

_____

_____



PROFIT LOSS & ROCK AND ROLL

My notes


CROSLEY

SESSION 07

Scale with Purpose: Unlock the Advisory Capacity.



IAN VACIN (NASHVILLE, MINNEAPOLIS, BOULDER, PHOENIX, SEATTLE)
JOE CARUFE (RALEIGH)

More advisory means freeing up your senior people, which means pushing their production work down to junior staff. It sounds simple, and yet it's where firms come unstuck, because you can only push work down if there's room below to catch it, and that judgment call usually comes down to a guess. Guess wrong, and the work bounces back up, or falls through the cracks. This workshop replaces the guess with a number, a clear read on how much of each person's week reaches client work, once you account for how their time splits and the real-world factors that thin it out.

KARBON

SCALE WITH PURPOSE: UNLOCK THE ADVISORY CAPACITY YOU ALREADY HAVE

Meet Precision Advisory Accounting—a full-service advisory firm, growing fast enough to feel it, and stuck in the exact spot a lot of firms in this room are standing in right now. Eighteen people, six service lines, and a leadership team that couldn't tell you with confidence where anyone's time was actually going. Over the next few pages, you'll do exactly what their leadership team did: place five of their people on the capacity chart, score what's really driving—or draining—their week, and calculate what their true capacity actually is. By the end, you'll know how to run this on your own.

MEET PRECISION ADVISORY

Precision Advisory Accounting was founded in 2019 by two CPAs, Sarah Chen and Marcus Rodriguez. What started as a two-person shop offering tax prep and compliance has grown into an 18-person, full-service advisory practice—tax, CAS, virtual CFO, accounting, financial advisory, and audit. But growth hasn't been the hard part. Capacity has.

At 14 people, revenue had stalled at $1.8M. Both founders were still buried in client delivery. Nobody—not even Sarah and Marcus—could tell you with confidence where each person's time was really going, or whether there was room to shift anyone's work around.



Here's a look at how Precision Advisory is structured today. Five roles are highlighted.

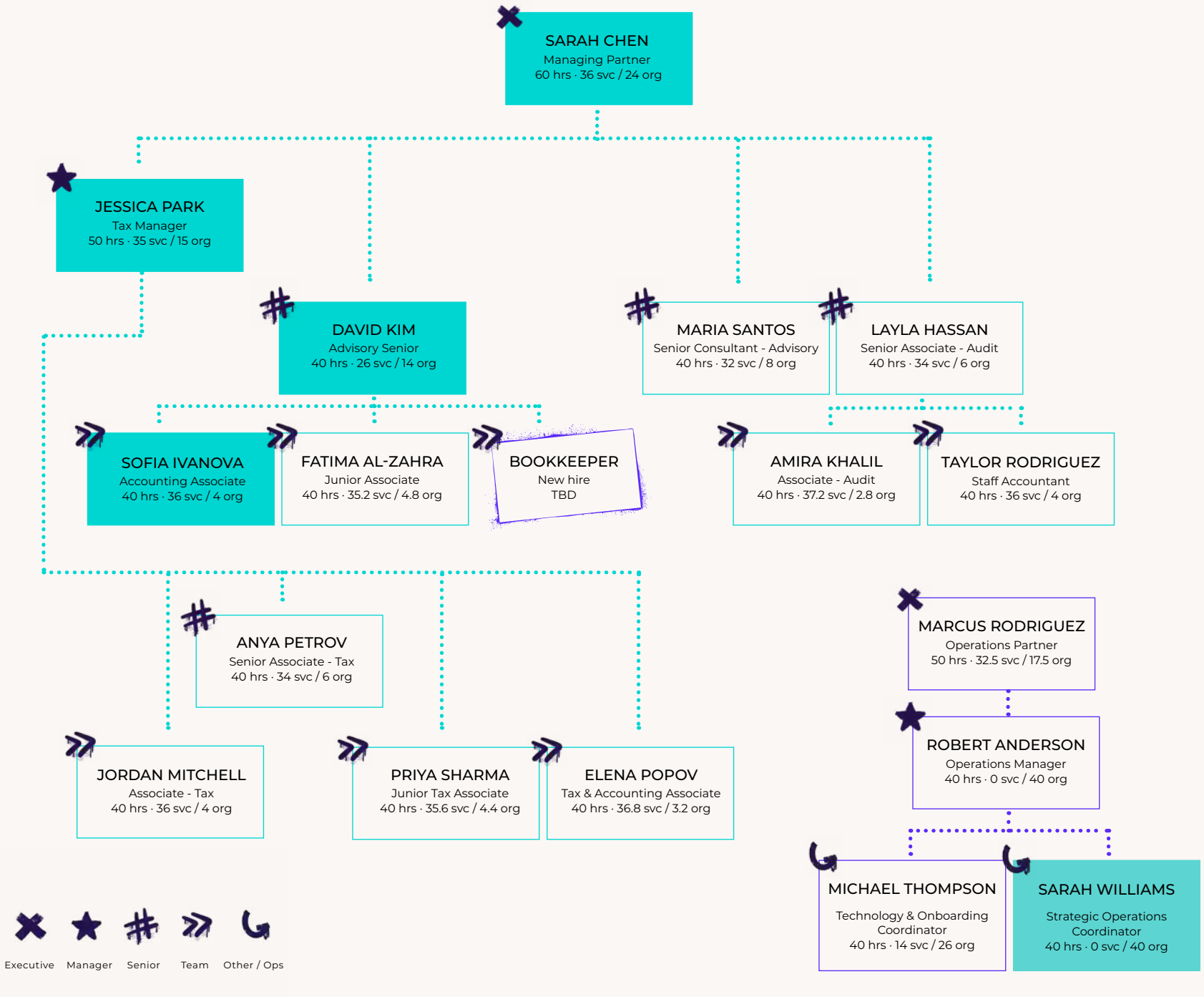
* One Striad is empty we will come back to that

PRECISION ADVISORY ACCOUNTING

TEAM STRUCTURE CAPACITY CHART – WITH REPORTING LINES

Featured in workshop activities

Vacant/open role



MAP THE TEAM (TEAM STRUCTURE CAPACITY CHART)

Read each profile below. For each person, decide how their week splits between Service (client-facing) and Organizational (internal, non-client) work—then place both numbers in the table on the next page. Each profile tells you their total weekly hours; your job is the split.

Sarah Chen

MANAGING PARTNER (EXECUTIVE STRIAD)

Sarah co-founded Precision Advisory six years ago and still can't fully let go of client work—she loves being in the room with clients too much to hand it all off. But as Managing Partner, she also owns firm strategy, partner-level decisions, and increasingly, the people side of a growing the practice. She works a steady 60 hours most weeks. A little more than half goes to the clients she's personally responsible for; the rest goes to running the firm itself.

Jessica Park

TAX MANAGER (MANAGER STRIAD)

Jessica has been at Precision Advisory since year two and was recently tapped to lead the tax practice's day-to-day. She still carries a full client load of her own—busy season doesn't wait for anyone—but she's also become the one everyone comes to for review, scheduling, and keeping the tax team on track. She's budgeted for 50 hours a week, and the clear majority is client-facing work; the rest goes to keeping her team running.

David Kim

ADVISORY SENIOR (SENIOR STRIAD)

David joined Precision Advisory two years ago from a larger regional firm and has quickly become one of the go-to advisory seniors on the team. He carries a full 40-hour week. Most of it is spent directly with clients—modeling, planning, advisory deliverables—but he's also started mentoring two of the newer associates, which pulls a meaningful slice of his week into internal work.

Sofia Ivanova

ACCOUNTING ASSOCIATE (TEAM STRIAD)

Sofia is one of Precision Advisory's newest accounting associates, and true to her role, she spends nearly her entire 40-hour week heads-down on client accounting work—reconciliations, bookkeeping, month-end close. She hasn't yet been asked to take on any internal or administrative responsibilities; her job is almost entirely about the clients on her desk.

Sarah Williams

STRATEGIC OPERATIONS COORDINATOR (OTHER/OPS STRIAD)

Sarah doesn't have a single client on her desk—and that's by design. As Precision Advisory's Strategic Operations Coordinator, her full 40-hour week goes entirely toward keeping the firm's internal operations running: systems, scheduling, vendor relationships, and the dozens of behind-the-scenes tasks that let everyone else focus on clients.

STRIAD	TEAM MEMBER	TITLE	TOTAL HRS	SERVICE HRS	ORG HRS
EXECUTIVE	Sarah Chen	Managing Partner	60		
MANAGER	Jessica Park	Tax Manager	50		
SENIOR	David Kim	Advisory Senior	40		
TEAM	Sofia Ivanova	Accounting Associate	40		
OTHER/OPS	Sarah Williams	Strategic Ops Coord	40		
TOTAL	_____	_____	**230**		

Precision Advisory targets roughly 70% Service / 30% Organizational firm-wide. Add up your five—how close do they land?

SERVICE TOTAL _____ ÷ 230 = FIRM ORG % : _____

ORG TOTAL _____ ÷ 230 = FIRM SERVICE % : _____

How close do your five land to the 70/30 target?

SCORE THE M.E.L.T.

Read each profile again. This time, learn which single M.E.L.T. factor—Mind Emotion, Location, or Time—is doing the most to reduce this person's usable capacity right now. Then, on the next page, assign your own percentage to that specific factor and total the M.E.L.T. % for each person.

Sarah Chen

FACTOR: LOCATION

Sarah works from Precision Advisory's office most days, and lately that's meant something new: the firm expanded into a second, smaller satellite space this year, and she's been splitting her week between both locations to keep both teams connected. It's added a layer of friction to her days—commute time, context-switching between two physical spaces, calendar juggling neither office was really built for. Her focus and emotional bandwidth are steady as ever; it's simply a matter of not always being where she needs to be.

Jessica Park

FACTOR: MIND

Jessica took on the informal lead of the tax team's review process this year, on top of her own full client load. Her days are increasingly fragmented—a client call here, a review there, a scheduling question in between—with far less uninterrupted time to think deeply about any one thing. She's not overwhelmed exactly, and her schedule is fairly predictable, but the sheer number of things competing for her attention at any given moment has become the defining feature of her week.

David Kim

FACTOR: EMOTION

David is well into his second busy season at Precision Advisory, and this one has hit differently. Two of his largest advisory clients are going through their own high-stakes transitions—one mid-acquisition, one in the middle of a leadership change—and David has found himself absorbing a lot of that stress secondhand, on top of his own deadlines. He's still delivering strong work, but he's noticeably more drained by the end of most weeks than he was a year ago.

Sofia Ivanova

FACTOR: TIME

Sofia is newer to the team and still building her rhythm—talented and eager, but also juggling client deadlines against finishing her CPA coursework most evenings. Her calendar this season has very little slack in it; some weeks she's pulled between three different month-end closes landing in the same few days. It's less about any one thing being hard, and more that there simply isn't enough clock left in her week most weeks.

Sarah Williams

FACTOR: LOCATION

Sarah Williams works fully remote, based two time zones away from Precision Advisory's home office. It's worked well for years, but the firm's recent growth means more of her operational work now depends on being looped into real-time conversations and being physically present for a handful of in-person systems rollouts—neither of which her home setup was built for. She's otherwise steady and unbothered by the pace of the work itself.



STRIAD	TEAM MEMBER	MIND %	EMOTION %	LOCATION %	TIME %	TOTAL MELT %
EXECUTIVE	Sarah Chen	2%	0%	_____	1%	_____
	Marcus Rodriguez	1%	4%	0%	2%	7%
MANAGER	Jessica Park	_____	2%	1%	0%	_____
	Robert Anderson	3%	4%	0%	2%	9%
SENIOR	David Kim	3%	_____	2%	4%	_____
	Anya Petrov	0%	3%	5%	1%	9%
	Layla Hassan	4%	1%	0%	6%	11%
	Maria Santos	1%	0%	4%	3%	8%
TEAM	Sofia Ivanova	4%	3%	1%	_____	_____
	Taylor Rodriguez	6%	5%	2%	0%	13%
	Jordan Mitchell	2%	7%	1%	3%	13%
	Amira Khalil	0%	2%	6%	4%	12%
	Elena Popov	3%	1%	0%	5%	9%
	Fatima Al-Zahra	7%	0%	4%	2%	13%
	Priya Sharma	1%	6%	3%	0%	10%
OTHER / OPS	Michael Thompson	0%	1%	2%	3%	6%
	Sarah Williams	2%	0%	_____	1%	_____

BUILD THE CAPACITY ANALYSIS CHART

Here's how the math comes together for one person—Marcus Rodriguez, Operations Manager (Executive). Follow the calculation, then complete the same table for your five people. Note: You will need to convert Service Hrs to a percentage for the value in (D) in the table below.

Marcus works 50 hours a week. His team has scored his current M.E.L.T. discount at 7%. From Exercise 2, you know his time splits 65% Service / 35% Organizational.

CAPACITY VALUE STRIAD	HOURS PER CONTRACT (A)	M.E.L.T. DISCOUNT (B)	HOURS NET OF M.E.L.T. (C=A*(100%-B))	% TIME DEVOTED TO REVENUE (D)	RDH (E=C*D)
EXECUTIVE	50	7%	46.5	65%	30.2

Marcus has 30.2 true Revenue Devoted Hours this week—not the 50 his contract says, and not even the 32.5 his Service-side hours alone would suggest.

STRIAD	TEAM MEMBER	HOURS PER CONTRACT (A)	M.E.L.T. DISCOUNT (B)	HOURS NET OF M.E.L.T. (C=A*(100%-B))	REVENUE DEVOTED HOURS (E=C*D)	RDH (E=C*D)
EXECUTIVE	Sarah Chen	60				
MANAGER	Jessica Park	50				
SENIOR	David Kim	40				
TEAM	Sofia Ivanova	40				
OTHER/OPS	Sarah Williams	40				

Your turn. Using your answers from Exercises 2 and 3, complete the same five columns for Sarah Chen, Jessica Park, David Kim, Sofia Ivanova, and Sarah Williams.

THE FULL PICTURE

The real Precision Advisory numbers

Once your table is complete, here's what the real Precision Advisory numbers look like across all 18 people: 496.3 Service hours and 223.7 Organizational hours per week, out of 720 total. M.E.L.T. costs the firm 71.5 hours of net capacity. The result: 61.7% of the firm's total capacity is truly revenue-devoted—not the "70% billable" they assumed before doing this exercise. Notice something else in your five-person table: Sofia Ivanova, on the Team striad, likely landed well under her 90% ceiling. That's the gap a firm this size can push production work into—if the math backs it up.

One more lever: expected time off

One more discount real firms apply that we haven't touched today: expected time off. PTO, holidays, parental leave—every period, some percentage of contracted hours simply won't happen. The logic is the same as M.E.L.T.: take net capacity, and reduce it further by the share of the period someone's realistically going to be out. We're not asking you to calculate that today—just know it's the next lever once TSCC and M.E.L.T. are second nature.

Keep going after today: the full Precision Advisory case study, the completed spreadsheet behind every number on these pages, and a blank template for your own team are all at scalewithpurpose.info/resources.

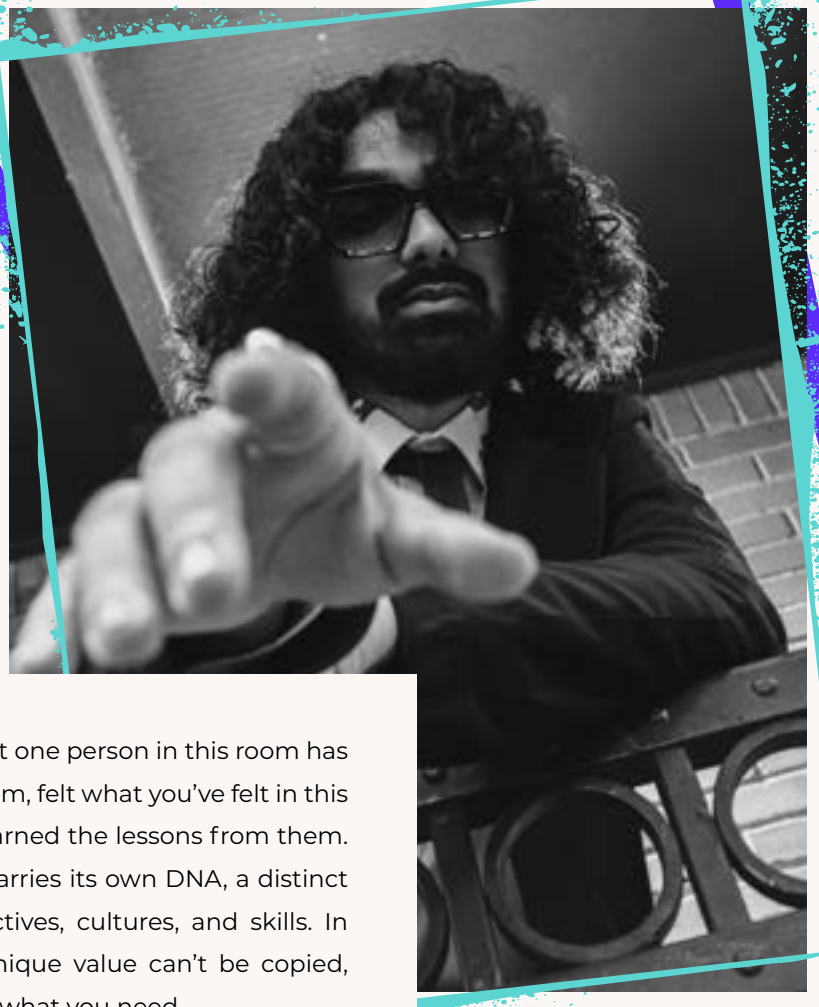
One production task you could push down this month:

Full case study, completed spreadsheet, and blank template at scalewithpurpose.info/resources



My notes





GET LOUD

No one else has lived the years you've lived. Not one person in this room has sat across from the clients you've sat across from, felt what you've felt in this work, made the mistakes you've made and learned the lessons from them. That extends out to your teams. Every team carries its own DNA, a distinct extraordinary blend of backgrounds, perspectives, cultures, and skills. In other words, your firm is **inimitable**. Your unique value can't be copied, automated, or replicated. So, you already have what you need.

You're not here to figure out how to be *something or someone* else. You're here to uncover the power in your own story, own it, and amplify it.

SESSION 08

Find Your Story: How Trusted Advisors Stand Out In An AI World

ELLIOTT BASTIEN MORIN

The profession has spent decades building value on information, analysis, and technical knowledge. AI makes all of that abundant and easy to replicate, so knowledge alone no longer distinguishes one firm from another. What can't be automated is meaning, helping a client understand what the numbers are telling them, what matters, and what to do next. That is the work of story, and it's how trust gets built and decisions get made. This session is a method for uncovering your firm's unique story and giving it a shape you can use.



3motion

FIND YOUR STORY

Stories are everywhere.
We live them. We breathe them.
SOMETIMES, WE BURY THEM

Your firm's story already exists. Use these pages to uncover it, identify who needs to hear it, and shape it into a narrative that moves people and business.

OPENING NOTES

As you listen, capture any words, ideas, experiences, or possible stories that come to mind.

THE CHECKLIST



SCOPE:

- [ ] Situation
- [ ] Complication
- [ ] Objective
- [ ] Proof
- [ ] Ending



SIFT

- [ ] Search
- [ ] Identify
- [ ] Format
- [ ] Tell



SHINE:

- [ ] Shape
- [ ] Hook
- [ ] Iterate
- [ ] Narrate
- [ ] Engage

THE CODE

33 21 25 6 2

5 9 1 34

17 22 14

37 29 13 38 10

26 18 30

23 15 7 24 20 8 28

11 19 27 16

4 40

31 35 32 36

3 39 12

TIME: _____ SCORE: _____

CHOOSE YOUR STORY



☐ ORIGIN STORY:

How did we get here, and what shaped us?



☐ VALUE STORY:

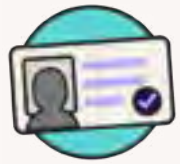
What do we do, and why does it matter?



☐ VISION STORY:

Where are we going, and what future are we working to create?

IDENTIFY YOUR AUDIENCE



ID CARD

CHOOSE YOUR FIRM ARCHETYPE



☐ LEADER



☐ DIPLOMAT



☐ PROVIDER



☐ SAVANT



☐ GAME CHANGER



☐ EXPLORER

FIND YOUR CLAIMS



PAIN



CLAIM



GAIN



SITUATION

What is the current state of your audience's world?



COMPLICATION

What problem (PAIN) do you have?



OBJECTIVE

What solution (CLAIM) can you offer?



PROOF

The evidence (GAIN) alleviated the problem (PAIN).



ENDING

What's the message for your audience?



YOU LANGUAGE

How can you place the audience at the center of the story?



TANGIBLES

What specific detail, example, or sensory element will make the story feel real?



METAPHORS

What comparison or image could make the idea easier to understand?



CALLBACKS

What earlier detail or idea could you return to at the end?



CREDIBILITY

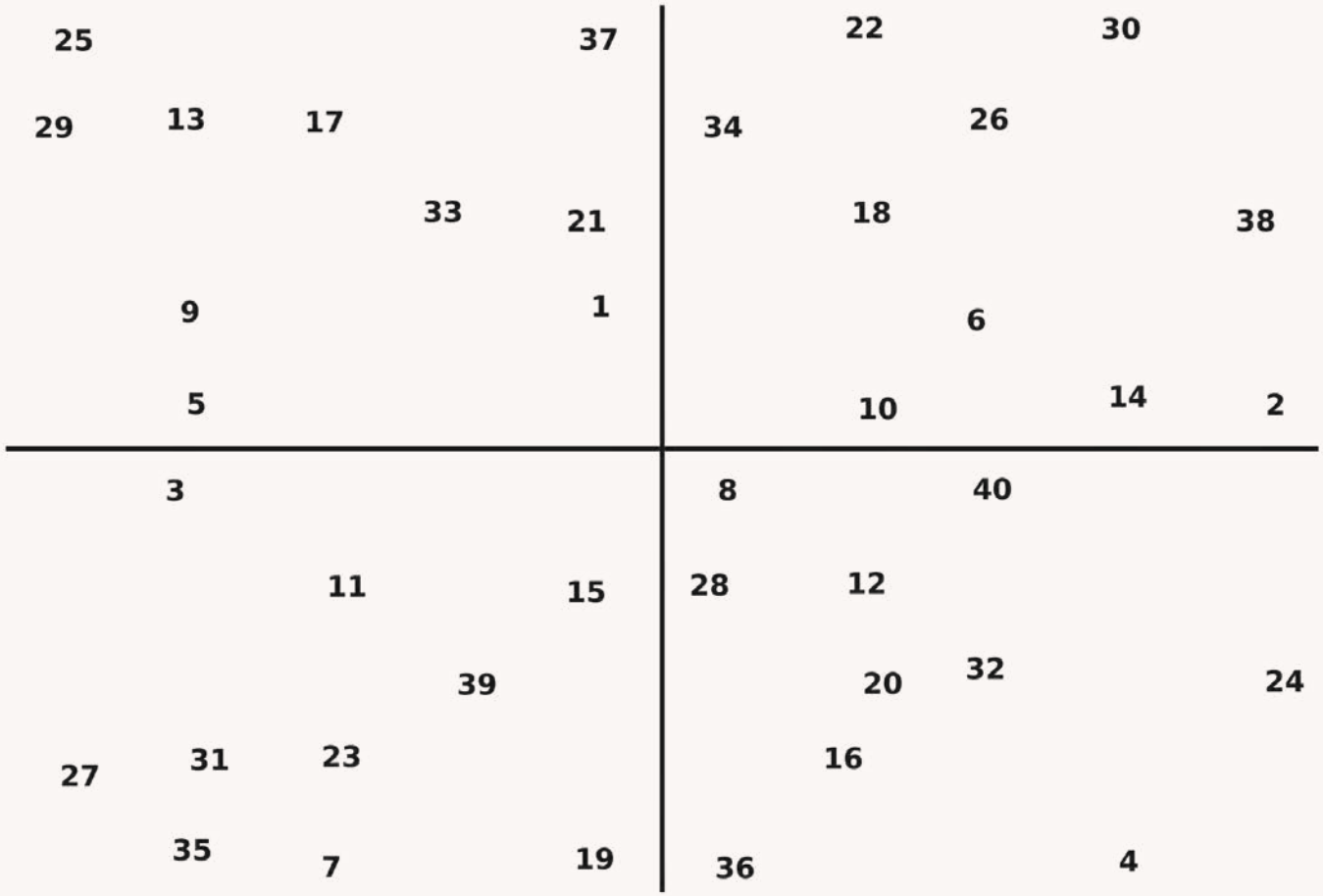
What proof, experience, source, or result will build trust?



ATTENTION GRABBER

What will make the audience want to keep listening?

THE CODE, ROUND 2



TIME: _____ SCORE: _____

My notes

BEFORE YOU GO

YOU'VE FILLED THESE PAGES WITH IDEAS FROM TODAY.

Here's where you choose what to do with them.

Write down the one change you want to make in the next month. Name the first step, and give it a date.

THE ONE CHANGE I'M COMMITTING TO:

THE FIRST STEP I'LL TAKE:

BY WHEN:

THANK YOU FOR SPENDING THE DAY WITH US

LET'S HEAR IT ONE LAST TIME FOR OUR TOUR PARTNERS AND COLLABORATORS.

KARBON · MERIDIAN · AccountGroove · Human Interest · spotlight reporting · Expensify · 3motion · onpay · Relay · CAS · Kick · vinyl · bill · StanfordTax · aider · teamup · Tax Figure · COUNT · Brex

Fearless Foundry

FAVORITE THIS PLAYLIST.

You made real progress on your advisory goals today. Don't let it stop here.

The Resource Playlist is where the party continues. Scan the code, and you'll find the full digital library behind everything you worked through today, plus bonus material from our partners.

THIS IS YOUR ENCORE



Now that the tour is over, the real journey begins; for you, your firm, and the future you're building.

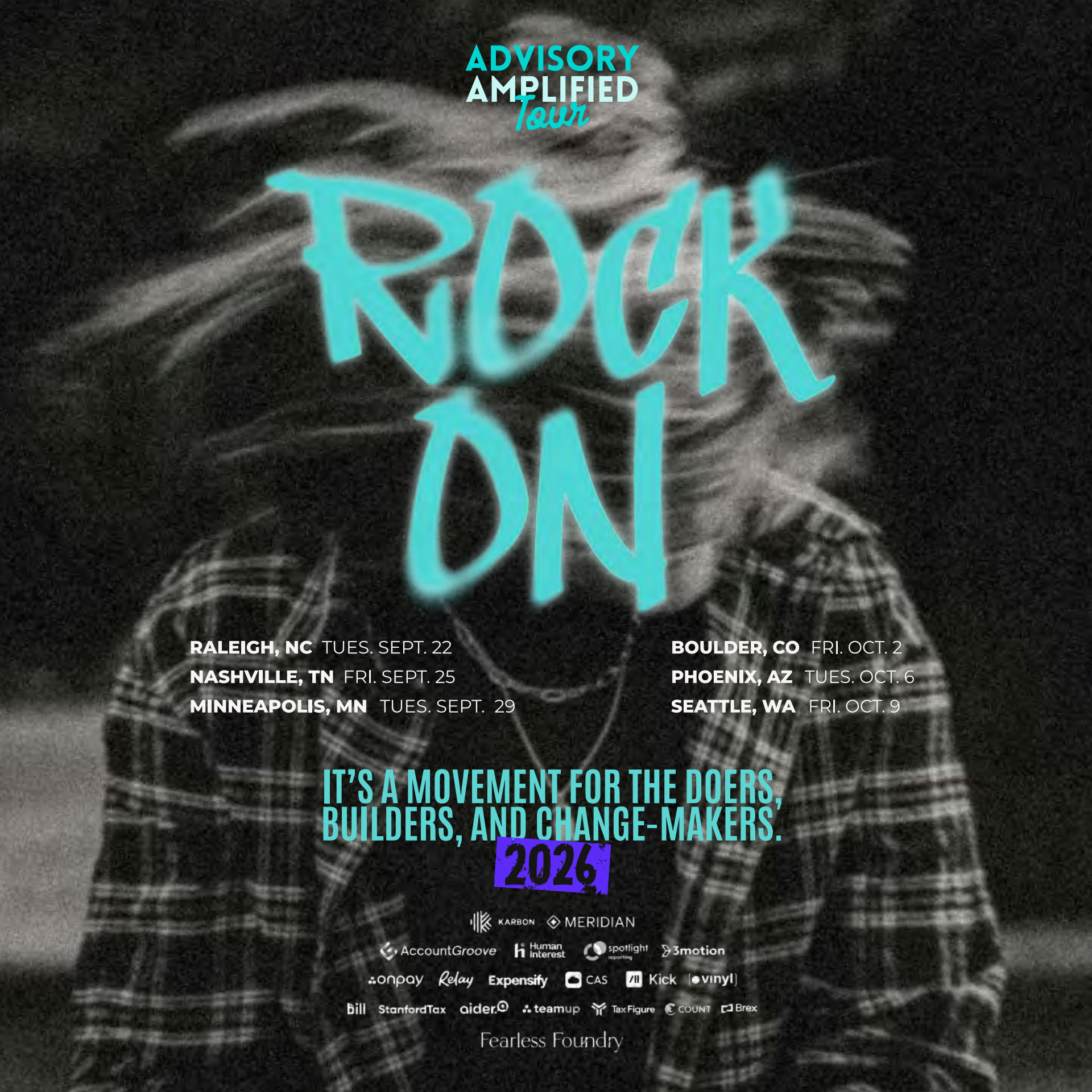
This workbook isn't meant to be the end. It's meant to be a beginning. A place to return to when you're training your team, reworking your strategy, or simply revisiting these exercises as your firm evolves. Each time you come back, you'll uncover new insights and unlock deeper levels of growth.

Every stop of Advisory Amplified has been fueled by one simple belief: together, we can amplify what's possible. Every partner, speaker, and attendee on this tour is committed to your journey.

The lights may be down, but your encore is just beginning.

With deep gratitude,

The Advisory Amplified Team


ADVISORY AMPLIFIED Tour
ROCK ON
RALEIGH, NC TUES. SEPT. 22
NASHVILLE, TN FRI. SEPT. 25
MINNEAPOLIS, MN TUES. SEPT. 29
BOULDER, CO FRI. OCT. 2
PHOENIX, AZ TUES. OCT. 6
SEATTLE, WA FRI. OCT. 9
IT'S A MOVEMENT FOR THE DOERS, BUILDERS, AND CHANGE-MAKERS.
2026
KARBON
MERIDIAN
AccountGroove
Human Interest
spotlight reporting
3motion
onpay
Relay
Expensify
CAS
Kick
vinyl
bill
StanfordTax
aider
teamup
Tax Figure
COUNT
Brex
Fearless Foundry