VFD Pro Implementation Guide

Transform Your Practice with Comprehensive Advisory Services

Unlocking Your Client Potential:
How VFD Pro Empowers Accountants to Transition from Compliance to Advisory

Helping Ambitious Entrepreneurs Survive, Thrive, Scale and Exit Successfully

vfd virtual finance director

Table of Contents

If you have any specific queries relating to the content of this document or the associated resources on the VFD.Academy website, please call the VFD Pro support team on 0203 475 3313. The team is available during working hours of 9.00am – 5.00pm, Monday – Friday (UK Time). Outside of these hours, please raise a support ticket or email ticket@vfd-pro.com.

For further information on additional services and support provided by VFD Pro Ltd, please visit our websites: www.VFD.Academy and www.VFD-Pro.com.

Is this guide for you?

If you're an accountant or business advisor eager to move beyond compliance services and add significant value to your clients, this guide is for you. It demonstrates how VFD Pro can transform your practice, enabling you to offer comprehensive advisory services that drive business growth and profitability.

Discover step-by-step instructions, practical insights, and powerful tools to elevate your client relationships and maximise your revenue potential. Start your journey towards becoming a trusted advisor and see how VFD Pro can help you thrive in today's competitive landscape.

Are You Ready to Transform Your Practice?

To ensure this guide will benefit you in developing an advisory solution, consider the following questions:

1. **Are you looking to add value beyond compliance services?**
    - If you aim to move from basic bookkeeping, payroll, VAT returns and statutory accounts to offering strategic advice, this guide will show you how VFD Pro can facilitate that transition.
2. **Do you want to deepen your client relationships and become a trusted advisor?**
    - If building stronger, more meaningful relationships with all your clients is a priority, the methodologies and tools outlined here will help you achieve that goal.
3. **Are you seeking ways to increase your revenue through advisory services?**
    - If you are interested in expanding your revenue streams by providing high-value advisory services, this guide provides practical steps and insights into leveraging VFD Pro for financial growth.
4. **Do you need a structured approach to implementing advisory services in your practice?**
    - If having a clear, step-by-step plan to guide you through the process of becoming an advisory-focused practice is important, this document offers a comprehensive roadmap.

By reflecting on these questions, you can determine if you're ready to take the next step in transforming your practice with VFD Pro.

Glossary / Definition of Terms

VFD Pro

VFD Pro is a comprehensive software platform designed to help accountants and business advisors transition from providing compliance-focused services to offering valuable advisory services. It includes tools for financial reporting, client assessment, business planning, and growth & exit strategies, enabling users to support clients at every stage of their business journey.

VFD Pro Portal

The VFD Pro Portal is the central hub for users of the VFD Pro platform. It provides access to the suite of tools. The portal is designed to streamline workflows, enhance client interactions, and support the delivery of high-quality advisory services.

VFD Academy

The VFD Academy is an educational resource centre provided by VFD Pro. It offers a range of training programs, courses, and certifications designed to help accountants and business advisors develop their skills and knowledge. The Academy supports continuous learning and professional development, ensuring users can effectively utilise VFD Pro tools and deliver exceptional advisory services to their clients.

Growing Your Numbers

Growing Your Numbers is a brand developed by VFD Pro aimed at directly engaging business owners. It offers educational programs and resources designed to help business owners understand and manage the financial performance of their business better, thus empowering them to make informed decisions that drive business growth and profitability.

The VFD Way

The VFD Way is a structured approach developed by VFD Pro for implementing advisory services in accounting practices. It encompasses a series of best practices, tools, and methodologies that guide accountants through the process of transitioning from compliance services to comprehensive advisory roles, ensuring consistency and effectiveness in service delivery.

Mastery Programme

The Mastery Programme is an extensive support initiative provided by VFD Pro designed for client managers. It offers in-depth training, resources, and ongoing support to help them master the use of VFD Pro tools and methodologies. The goal is to enhance their ability to deliver high-quality advisory services to their clients.

Mastermind Programme

The Mastermind Programme is a collaborative support network for accountants and business advisors using VFD Pro. It provides a platform for peer-to-peer learning, sharing best practices, and solving common challenges. Participants benefit from the collective experience and insights of the community, enhancing their advisory capabilities.

Financial Management for Business Owners (FiMBO)

FiMBO is a 12-week educational course offered by VFD Pro that trains business owners on the importance of understanding their business numbers. The course covers the seven key growth drivers of a business, emphasising how small improvements in these areas can significantly impact profitability, cash flow, and business value.

Exit Planning 101

Exit Planning 101 is a 12-week educational course focused on preparing business owners for a successful exit from their business. It includes strategies and tools for planning, tracking, and reporting performance against exit objectives, ensuring that business owners can maximise the value of their business when they decide to sell or transfer ownership.

Supporting You, Your Business & Your Clients at Every Stage of the Journey

Introduction – Why advisory, why now?

Welcome to the VFD Pro Implementation Guide. This comprehensive guide will walk you through how to leverage VFD Pro to transform your accounting practice from a compliance-focused operation to a full-service advisory powerhouse.

Designed for accountants and advisors eager to offer more to their clients, this guide provides detailed steps, practical advice, and insights into making the most of VFD Pro.

The Need for Comprehensive Advisory Solutions

In today's business environment, clients need more than just compliance services; they need strategic advice and insights that help them grow and succeed. As an accountant / advisor, expanding your services to include advisory solutions can significantly enhance your value to clients and increase your revenue. However, the transition can be challenging without the right tools and processes in place.

Adapting Solutions to meet Client Needs

Every client *(and prospect)* has unique needs, providing a tiered advisory offering you can systemise your approach with the full support of VFD Pro.

Level	Business Requirement
1	**Master Financial Management with Training and Insights** *Gain essential skills and track progress with our specialised training and straightforward reporting.*
2	**Unlock Your Business's Growth Potential** *Discover actionable insights and strategies to boost profit, cash flow, and value.*
3	**Transform Data into Strategic Decisions** *Harness your accounting data to achieve quarterly goals and continuous improvement.*
4	**Secure Your Financial Future with Expert Oversight** Ensure financial integrity and proactive management with a dedicated part-time Financial Controller.
5	**Strategic Financial Leadership for Growth** *Drive your business forward with expert planning, forecasting, and risk management with support of a part-time Finance Director.*
6	**Maximise Your Business Value for a Successful Exit** *Prepare your business for sale and maximise its market value with strategic planning.*

Service Levels for Accountants and Advisors

Level 1: Master Financial Management with Training and Insights

Help your clients gain essential skills and track progress with specialised training and straightforward reporting. Equip them with effective business and financial management practices to increase profit, improve cash flow, reduce stress, and achieve a better work/life balance.

Benefits:

- Provide clients with essential business and financial management skills through training programs.
- Offer regular Management Reports to help clients monitor progress and improve performance.
- Maintain flexible options, allowing clients to benefit from your services while retaining their current accountant.

Client Investment:

- Educational Courses: £297 per person for each of the two key courses: Financial Management for Business Owners (FiMBO) and Exit Planning 101.
- Monthly Management Reporting: £800 (one off), including an initial meeting.

Level 2: Unlock Your Client's Business Growth Potential

Deliver actionable insights and strategies to boost your client's profit, cash flow, and business value. Provide a clear understanding of their growth potential and a detailed action plan.

Benefits:

- Conduct comprehensive analysis of your client's business growth potential.
- Provide a detailed report and action plan to guide business improvements.
- Basic monthly Management Reporting
- Offer the option to make this an annual planning session to set and achieve yearly goals.

Client Investment:

- One-off Investment: £600 or £60 per month for annual sessions.

Level 3: Transform Data into Strategic Decisions

Help clients harness their accounting data to achieve quarterly goals and continuous improvement. Provide comprehensive management reports and conduct regular planning meetings to ensure continuous improvement and accountability.

Benefits:

- Leverage existing accounting data to drive business decisions.
- Hold regular meetings to review progress, set targets, and maintain accountability.
- Offer flexible meeting frequencies to suit business needs.

Client Investment:

- From £250 per month, subject to frequency of review meetings.

Level 4: Secure Your Client's Financial Future with Expert Oversight

Ensure financial integrity and proactive management for growing businesses with a dedicated part-time Financial Controller. Provide comprehensive oversight of the accounting function, enhancing financial integrity and offering critical financial insights.

Benefits:

- Monthly management reporting and review meetings.
- Tight internal controls and budget management.
- Financial support integrated into the management team.

Client Investment:

- From £500 per month, subject to frequency of review meetings.

Level 5: Strategic Financial Leadership for Growth

Drive your client's business forward with expert planning, forecasting, and risk management. Offer part-time Finance Director services to support strategic financial planning, risk management, and performance tracking against forecasts.

Benefits:

- Provide strategic financial planning and risk management.
- Assist with major financial decisions.
- Regularly track and report performance.

Client Investment:

- From £1,500 per month, depending on the level of support required.

Level 6: Maximise Your Client's Business Value for a Successful Exit

Prepare businesses for sale and maximise their market value with strategic planning. Help clients systemise their business, maximise value, and ensure readiness for sale, increasing attractiveness to potential buyers.

Benefits:

- Long-term planning to maximise business value.
- Implement systems and processes to de-risk the business.
- Take a strategic approach to prepare for a successful exit.

Client Investment:

- From £2,500 per month, depending on business complexity.

Connect to your preferred accounting platform

VFD Pro connects directly with Xero, QuickBooks, Sage 50 and many more. You can even import data from Excel.

Getting Started with VFD Pro

Access Your VFD Pro Portal

This will be your central hub for managing client data, generating reports, and accessing the various tools and resources VFD Pro offers. The setup process is straightforward, and VFD Pro's support team is available to assist you every step of the way.

Adding Clients Using the Business Overview Connection Type

The next step is to add **every** client using the Business Overview connection type. This feature is included in all VFD Pro plans and allows you to generate comprehensive **Business Overview Reports** for an unlimited number of clients, helping you and your clients understand their financial performance better.

Advisory Insight: *by adding all you clients VFD Pro can assist you in identifying the most likely candidates for advisory services using the Client Advisory Assessment Model.*

Educating Your Clients *(and Prospects)*

Business owners need guidance to better understand their financial position and develop plans for a successful business exit.

VFD Pro has developed two critical business education programmes to support you, better educated clients ask better questions… leading to a requirement for enhanced financial management and reporting.

Advisory Insight: *run these programmes within your practice or leverage the programmes run by the Growing your Numbers' team.*

How to Grow a Profitable Business & Preparing for a Successful Exit

Two 12-week programmes exploring the biggest challenges faced by every SME you support.

- Add Value for existing clients = Increase Fees
- Introduce and Up-sell Advisory Services
- Engage with, and convert 'Leads' into 'Clients'
- Provide practical, 'on the job' training for your team

The **Financial Management for Business Owners** (FiMBO) program is designed to help business owners improve their financial management skills and grow their businesses.

The **Exit Planning 101** program is designed to help business owners work towards a successful business exit and understand the options available to them.

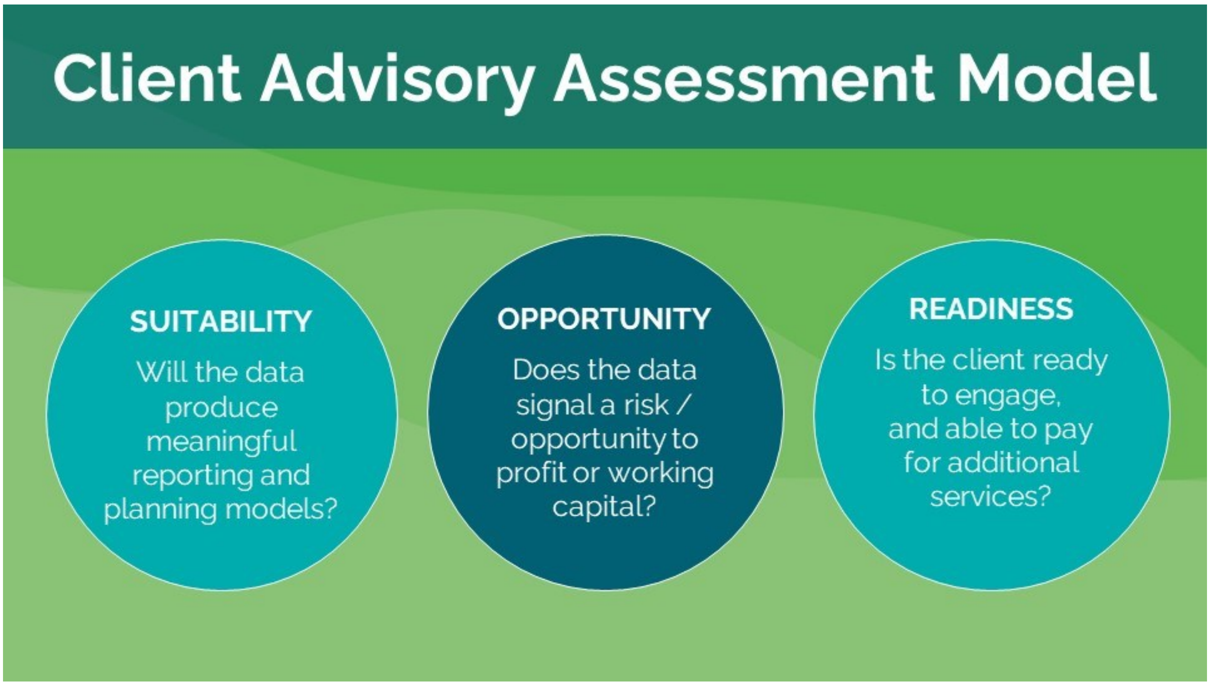
Utilising the Business Overview Report

The Business Overview Report is a powerful tool included within all VFD Pro plans. You can generate these reports for as many clients as you need, as often as necessary. The frequency of these reports should be tailored to the level of support you provide:

- **Monthly**: For clients with comprehensive bookkeeping support.
- **Quarterly**: For clients receiving VAT assistance.
- **Annually**: For clients who only require year-end support.

Prioritising Advisory Conversations: Client Advisory Assessment Model

With all of your clients connected to VFD Pro the Client Advisory Assessment Model evaluates three key areas to help you prioritise those to approach for advisory services.



***Advisory Insight:** You now have a reason to talk to your clients because you have gone to the effort of evaluating their current performance to assess any risks and opportunities.*

Enhancing Client Meetings: The Client Discussion Model

After prioritising your clients, use the **compliance plus connection type** to generate the **client discussion model**. This model provides all the information required for comprehensive year-end discussions which focus on the future rather than the past.

Advisory Insight: *The* ***'Client Discussion Framework'*** *is included in your VFD Pro plan, guiding you through the conversation with your client, leading to clients asking for additional services, rather than you having to 'upsell'.*

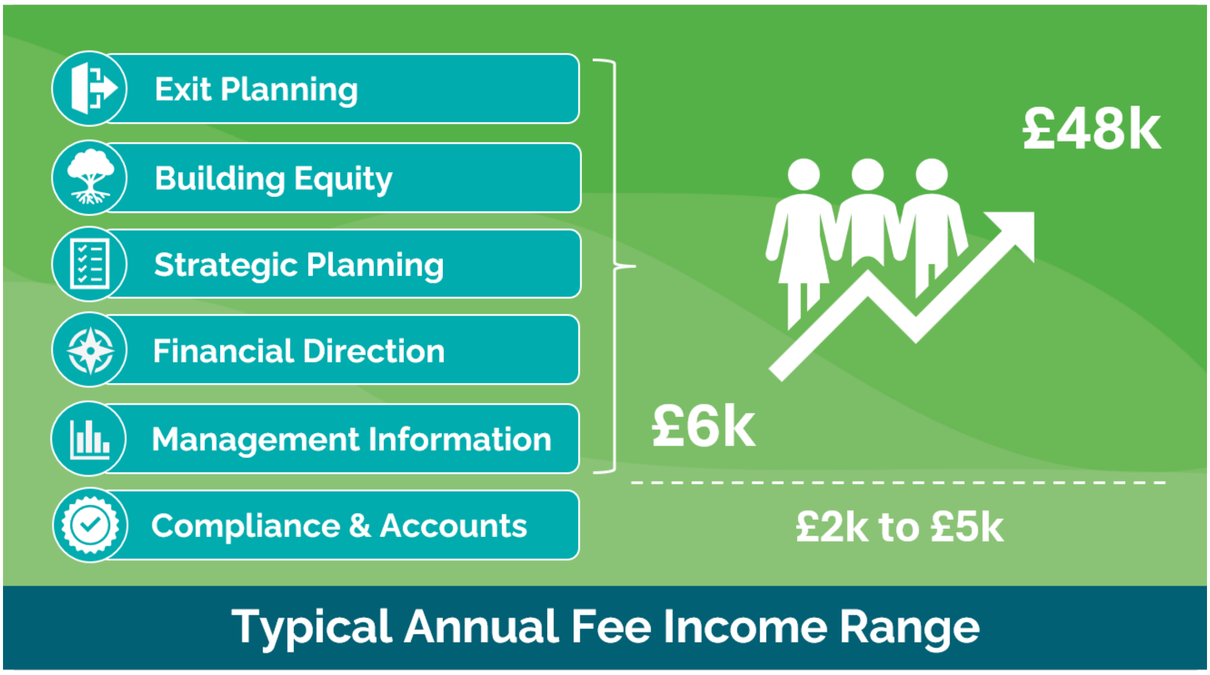
Client Segmentation and Service Levels

It's important to appreciate that implementing advisory across your entire practice does not mean providing comprehensive part-time Financial Director support to all of your clients, it's about...

Understanding the needs of all your clients is crucial for offering the right level of service.

Based on VFD Pro user experience, clients can be segmented as follows:

- **80%**: Value your support but will not be ready for additional services yet.
- **10%**: Want future-focused meetings annually.
- **4%**: Need quarterly performance review meetings.
- **3%**: Require part-time financial controller or director support.
- **2%**: Want to plan, track, and report against strategic plans.
- **1%**: Need help preparing for business exit.



Matching Connection Types to Services

Choose the appropriate connection type for the level of service you want to deliver to each client.

Level 1: Inform & Educate

Connection: Business Overview

The Business Overview connection type allows you to provide high-value insights to all your clients at no additional cost. It includes the Business Overview Report, which serves as an educational tool to help business owners understand the value of management information. This report can be a gateway to upselling more comprehensive management reporting and support services.

You could choose to charge for this additional service with typical fee income ranging from £25 per month for reporting only to £100 per month for reporting plus a quarterly review meeting. Or, you could choose to offer free of charge and use this as a great client acquisition and retention tool as you stand out from the service offerings of other accountants.

Level 2: Annual Review

Connection: Compliance Plus

The Compliance Plus connection type transforms client relationships by focusing on future-oriented discussions. It includes:

- **Client Discussion Model**: Prepares you for engaging future-focused discussions with clients.
- **Business Overview Report**: Provides ongoing management reporting.
- **Financial Management for Business Owners (FiMBO) Training**: Educates clients and helps upsell services.

This connection type facilitates significant fee income increases with minimal additional time investment. Training for client managers takes about half a day.

Level 3: Quarterly Performance Reporting

Level 4: Part-time Financial Controller

Connection: Advisor Lite

The Advisor Lite connection type supports the delivery of a robust package of management information to assist in part-time financial controller functions for clients. It includes:

- **Management Information Reports and Scenario Planning Models**: Provides depth and breadth of financial insight.
- **Financial Expertise**: enhanced financial management discussions.

Typical incremental fee income ranges from £250 to £1,000 per month, depending on the client's business size, complexity, and needs. This package supports various service offerings, including monthly reporting and management review meetings.

Level 5: Part-time Financial Director

Connection type: Advise & Grow

The Advise & Grow connection type equips you with a comprehensive suite of analysis, reports, and models to support your part-time or virtual finance director (FD) services. It includes:

- **Financial Analysis and Scenario Planning**: Evaluates options and creates comprehensive plans.
- **Five-Year Three-Way Forecast**: Helps clients plan and track performance against strategic goals.

Typical fee income ranges from £750 to £2,500 per month, based on the client's business complexity and the support required. This connection type is ideal for supporting strategic financial decisions and management reporting.

Level 6: Business Exit

Connection type: Grow & Exit

The Grow & Exit connection type provides tools to support clients aiming to become "exit ready." It includes the full suite of EVA (Exit Value Accelerator) reports and models to maximise the business' realisable value upon sale. Key features:

- **Comprehensive Financial Management**: Prepares robust management information to attract potential buyers.
- **Five-Year Three-Way Forecast**: Helps clients plan and track performance against strategic goals.
- **Exit Planning Support**: Helps clients prepare their business for a successful exit.

Typical fees range from £2,000 to £4,000+ per month for augmented FD services, with potential additional fees for facilitating the sale of the business. Successful engagements can significantly increase the total consideration.

Developing Your Service Proposition

Once you have reviewed your client base and established the relevant connection types a typical implementation across your client portfolio will most likely look reflect the table below.

Service Level	Business Requirement	% Clients	VFD Connection Type
1	**Master Financial Management with Training and Insights** *Gain essential skills and track progress with our specialised training and straightforward reporting.*	**80%**	**Business Overview**
2	**Unlock Your Business's Growth Potential** *Discover actionable insights and strategies to boost profit, cash flow, and value.*	**10%**	**Compliance Plus**
3	**Transform Data into Strategic Decisions** *Harness your accounting data to achieve quarterly goals and continuous improvement.*	**4%**	**Advisor Lite**
4	**Secure Your Financial Future with Expert Oversight** Ensure financial integrity and proactive management with a dedicated part-time Financial Controller.	**3%**	
5	**Strategic Financial Leadership for Growth** *Drive your business forward with expert planning, forecasting, and risk management with support of a part-time Finance Director.*	**2%**	**Advise & Grow**
6	**Maximise Your Business Value for a Successful Exit** *Prepare your business for sale and maximise its market value with strategic planning.*	**1%**	**Grow & Exit**

Practice Development Programmes (The VFD Way)

The "Mastery" and "Mastermind" programmes offered by VFD Pro are designed to significantly enhance the capabilities of accountants, bookkeepers, and business advisors, providing you with the tools, knowledge, and support network they need to deliver high-value advisory services to SME business owners.

The programmes provide a structured pathway of continued professional development.

	Mastery Programme	Mastermind Programme
Frequency of Sessions	Weekly	Monthly
Duration of Programme	14 weeks	Continuing Development

Mastery Programme

The Mastery programme is focused on building deep technical skills and knowledge in financial analysis, forecasting, and business planning. It includes:

- **Platform Training:** Participants receive in-depth training on using VFD Pro's platform and tools to extract, analyse, and interpret financial data from cloud accounting platforms like Xero, QuickBooks, and Sage.
- **Financial Modelling:** Teaching participants how to build effective financial models that can help SMEs plan for the future, manage cash flow, and make informed decisions.
- **Best Practices:** Sharing industry best practices for financial management and advisory services, helping participants to add value to their SME clients beyond traditional accounting and bookkeeping services.

In addition, you will cover the crucial topic of **Client Engagement, Retention, and Acquisition** focused on building lasting client relationships through:

- **Effective Communication:** Use of VFD Pro's **'Client Discussion Framework'** to facilitate impactful conversations. This framework is designed to help you engage clients in discussions that go beyond the numbers, addressing their goals, challenges, and opportunities. You can now present services in a way which resonates with their specific business objectives. Setting clear expectations for the advisory relationship.

- **Building Trust:** Strategies to build and maintain trust with clients, establishing yourself as not just an advisor but as a strategic partner in their business journey.

- **Client Retention:** Techniques and practices that ensure client satisfaction and loyalty, turning one-time engagements into long-term relationships.

- **Acquisition Strategies:** Leveraging your expertise and the outcomes of your financial analysis and planning services to attract new clients. This includes understanding how to effectively communicate the value of your services, using case studies, testimonials, and tailored proposals to demonstrate your impact.

In addition, you will receive hands-on guidance on implementing these strategies in real-world scenarios, ensuring that you are well-equipped to enhance client engagement, retention, and acquisition. Through practical exercises, role-playing sessions, and feedback, participants will refine their approach to client interactions, learning how to create meaningful connections that drive business growth and client satisfaction.

Module 1	Module 2	Module 3	Module 4
Compliance+ 6 Hours CPD	Management Reporting 8 Hours CPD	Forecasting + Virtual FD/CFO 10 Hours CPD	Exit Planning & Support 4 Hours CPD

Mastermind Programme

The Mastermind programme is aimed at fostering a community among professionals, facilitating peer learning, and providing ongoing support. Key features include:

- **Peer Learning Groups:** Small, focused groups that allow participants to share experiences, challenges, and solutions with their peers, fostering a supportive community.
- **Expert Access:** Opportunities to interact with and learn from seasoned professionals and experts in the field of financial advisory and business growth strategies.
- **Continuous Learning:** Regular updates, workshops, and seminars on the latest trends, tools, and strategies in financial advisory, ensuring participants remain at the cutting edge of the industry.

Benefits for Participants

- **Enhanced Advisory Skills:** Professionals acquire skills to offer strategic business advice, helping SMEs navigate complex financial landscapes.
- **Increased Value:** By moving beyond compliance services into advisory, professionals can offer more value to their clients, deepening relationships and significantly increase their Revenue, their Profitability, their Cash Flow and the Value of their Business.
- **Networking Opportunities:** Professionals connect with a network of like-minded individuals, fostering opportunities for collaboration and mutual growth.

Target Audience

- **Primary Market:** UK-based accountants, bookkeepers, and business advisors looking to expand their services beyond compliance and into advisory roles.
- **Secondary Market:** Through its "Growing Your Numbers" brand, VFD Pro also engages directly with business owners, offering tools and insights to help them understand and manage their financials more effectively.

These programmes are part of VFD Pro's broader strategy to empower financial professionals and SME owners with the knowledge, tools, and support they need to thrive in a competitive business environment.

VFD Way Fast Track: Tailored Practice-Specific Programme

The VFD Way Fast Track programme is designed to help accounting practices excel in providing part-time Financial Director (FD) services and effectively develop and maximise the fee potential of their advisory offering.

Here is an overview of the two key components:

1. Service Delivery: Excelling as a Part-Time FD

The core of the VFD Way Fast Track programme is to ensure you and your team excel in the role of a Part-Time FD. The VFD Pro team have extensive experience and expertise as full-time and portfolio FDs, your practice will benefit from their deep knowledge and practical insights.

Expert Coaching and Mentoring:

- **Leverage VFD Assets:** You will learn how to utilise VFD tools to maximise practice efficiency and deliver high-value services.
- **Ongoing Support:** Access one-to-one mentoring and coaching to address any challenges and ensure successful client onboarding and retention, leading to increased fee income.

Training Format:

- **Building on VFD Mastery Training:** This introductory training covers the essential VFD tools and their functionalities.
- **Hands-On Approach:** Training is typically delivered face-to-face, on-site, with participants working on their client portfolios as though they were managing their own part of the practice.
- **Practical Application:** Use VFD tools and processes in real-time to engage, discuss, sell, and deploy these solutions with clients.

2. Business Development: Effective Marketing and Sales

Beyond service delivery, the second key component focuses on business development, comprising two main elements: lead generation and sales presentation.

Lead Generation and Marketing:

- **Consistent Messaging:** Ensure your firm's purpose and message are clear and consistent across all media, including verbal communication, your website, social media, and email.
- **Target Markets:** Clearly identify your target markets (e.g., manufacturing) to simplify lead generation and increase sales opportunities.

Sales Presentation and Processes:

- **Effective Presentation:** Develop the skills to clearly present your services, scope the ideal solutions, and agree on appropriate commercial terms.
- **Avoid Common Pitfalls:**
    - **Missed Sales Opportunities:** Without sufficient support, potential sales can be lost, leaving clients without the help they need.
    - **Underselling Services:** Inadequate scoping can lead to unmet expectations and short-lived engagements.

By addressing lead generation challenges with a clear purpose and consistent message, your practice will be better positioned to generate leads, make successful sales, and support clients effectively.

In summary

The VFD Way Fast Track programme provides the essential training and support needed to excel in delivering part-time FD services and developing your business. With expert guidance, practical training, and a strategic approach to business development, your practice will be well-equipped to grow and succeed.

Business Development with VFD Pro

The **business development connection type** is designed to help you sell additional advisory services. It generates a subset of reports with your clients' numbers in your branding, demonstrating the value you can add.

This connection type is included in every VFD Pro Plan and can be used for up to 30 days per client at no additional cost.

Advisory Insight: *People will rarely buy what they can't see. The Business Development connection allows you to grab their attention with a comprehensive review of their own business.*

Maximising Revenue with VFD Pro

Compliance and accounts preparation services typically generate annual revenues between £2,000 and £5,000 per client. Expanding into advisory services can significantly increase this figure, with potential additional revenues ranging from £6,000 to £48,000 per client for comprehensive services from management information to exit planning.

Conclusion: Elevating Your Practice

We hope this guide has provided you with the insights and tools needed to implement a comprehensive advisory solution across your practice using VFD Pro. From financial information to detailed exit planning, VFD Pro can transform your services and elevate your practice to new heights.

By transitioning to a full-service advisory practice with VFD Pro, you can offer unparalleled support to your clients, helping them survive, thrive, scale, and exit successfully. Start your journey today and see the transformative impact VFD Pro can have on your practice and your clients.

Next Steps

Click or scan the QR code

Book a Discovery Call	**Trial VFD Pro**	**Explore Growing Your Numbers**

Appendix: Summary of Reports and Models by Connection type

Service Level Delivered	6	5	4 / 3	2	1	N/A
Reports & Analysis	**Grow & Exit**	**Advise & Grow**	**Advisor Lite**	**Compliance+**	**Business Overview**	**Business Development**
Enhanced Performance Reports						
Business Overview Report	✓	✓	✓	✓	✓	✓
Performance Analysis Report	✓	✓	✓			✓
Performance Trend Report	✓	✓	✓			✓
Performance Analysis Report	✓	✓	✓			✓
Board Detail Report	✓	✓	✓			✓
Management Report	✓	✓	✓			✓
Customer Analysis Report	✓	✓	✓			✓
Marketing ROI Report	✓	✓	✓			
Supplier Analysis Report	✓	✓	✓			✓
Business Growth Advisory						
Client Discussion Model	✓	✓	✓	✓		
Business Growth Model	✓	✓	✓			✓
Client Segmentation Model	✓	✓				
Customer Targeting Model	✓	✓				
Forecast Model (by Customer)	✓	✓				
Forecast Model (by Nominal)	✓	✓				
Funding Proposal	✓	✓				
Performance vs Forecast Plan	✓	✓				
Non Financial KPI Model	✓	✓				
Business Data Model	✓	✓				
Opportunity Exception Reports						
Customer Exception Report	✓	✓	✓			✓
Utilities Exception Report	✓	✓	✓			✓
Telecoms Exception Report	✓	✓	✓			✓
Exit Value Accelerator (EVA)						
Business Valuation Model	✓					
Exit Planning Model	✓					
Performance vs Plan	✓					
Due Diligence Report	✓					

See VFD.Academy for full details.

Appendix: Practice Plans

Solutions tailored yo your client requirements.

PLAN LEVEL	ALL INCLUSIVE	Platinum	Gold	Silver	Bronze
How will you support your clients?	In every way	Exit Planning, Valuation & Due Diligence	Growth Planning & Reporting	Comprehensive Management Reporting	Future Focused Meetings
Client Reporting					
VFD Pro Portal	✓	✓	✓	✓	✓
Demonstration Reports	✓	✓	✓	✓	✓
New Reports - Early access	✓	✓	✓	✓	✓
Business Development Reports	✓	✓	✓	✓	✓
Business Overview Reports	✓	✓	✓	✓	✓
Business Intelligence Dashboard	✓	✓	✓	✓	
Practice Branded Portal	✓	✓	✓		
Practice Branded Demo Reports	✓	✓			
Client Advisory Assessment Model	✓	✓			
Connection Types (included in plan)*					
Business Overview Report	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Compliance+	Unlimited	25*	10*	3*	1*
Advisor Lite	Unlimited	1*	1*	1*	
Advise & Grow	Unlimited	1*	1*		
Grow & Exit	Unlimited	1*			
Practice Development Connection	Grow & Exit *(consolidated)*	Grow & Exit	Advise & Grow	Advisor Lite	Compliance +

**Additional connections can be added as required - volume discounts apply.*

Training & Support					
Academy User Access	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Practice Owners Peer Network	✓	✓	✓	✓	✓
Technical Training (2 per month)	✓	✓	✓	✓	✓
In Person Technical Support	✓	✓	✓	✓	✓
Video Support Guides	✓	✓	✓	✓	✓
Client Engagement & Promotion					
Practice Directory Listing	✓	✓	✓	✓	✓
FiMBO Training Material	✓	✓	✓	✓	
Client Opportunity Interviews	12 per year	12 per year	6 per year	4 per year	
PRACTICE INVESTMENT	**from £749** per month	**£299** per month	**£199** per month	**£129** per month	**£69** per month

[See VFD.Academy for full details.]

Extensive Support Programmes

GROWING YOUR NUMBERS

Support for you & your clients

Financial Management for Business Owners

Exit Planning 101

---

vfd virtual finance director

Support for you & your practice

Mastery Programme

Mastermind Groups

Helping Ambitious Entrepreneurs Survive, Thrive, Scale and Exit Successfully