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Roadmap to Support Future Growth

The SAN Client Advisory Services Program builds on the growth of Sage's partner ecosystem across the U.S. - which now includes over 11,000 accountants - and proposes an actionable roadmap for implementing higher-value, consulting services across ...

Aug. 21, 2018

Sage, a maker of cloud business management solutions, has launched the new Sage Accountants Network (SAN) Client Advisory Services (CAS) Program. The program provides tools and resources to support Sage's accounting community as they work to best deliver innovative, more valuable services to their customers.

The world is changing for today's Accountants, who strive to match the expectations of increasingly demanding clients. Results from Sage's recent Practice of Now Research show that in the US, 82% of respondents report that clients expect more services and resources from accountants today than they did five years ago.

The SAN Client Advisory Services Program builds on the growth of Sage's partner

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SAN Client Advisory Services Program, we are helping the accountant community transform their business model in order to stay ahead of change and embrace new technological innovation."

Designed in partnership with Boomer Consulting Inc., a renowned consulting firm within the accounting profession, the SAN CAS Program is valued at $2,000. However, the Program Toolkit is available at no additional cost for SAN members. The Toolkit consists of eight thematic advisory Pillars, including: Verticals and Market Segmentation, Key Performance Indicators, Packaging and Pricing, Talent Recruitment and Development, the Client Engagement Process, Business Development and Marketing, Engagement Letters and Service Agreements, and Business Planning.

Each Pillar offers a step-by-step downloadable guide with case studies, checklists, and templates to walk accountants through each step of transformation. SAN members can also participate in a live workshop associated with the program for an additional cost.

"The new SAN CAS Program Toolkit is a great resource that will assist us with delivering new operational insights and forecasting for our clients," said Sharon Berman, a SAN member and Principal at Rehmann CPA's and Advisors (a top 50 CPA firm). "We'll even have the ability to upgrade our data management effectively and securely. The useful tools will help us enhance our CAS practice to deliver even more value-added services to our clients — increasing overall growth and profitability for all stakeholders."

Sage EVP of Partners, Accountants and Alliances Jennifer Warawa will share information on the program at Accountex USA on Thursday, August 23rd, at 8:30am ET. The session titled, "Understanding How Tomorrow's Business Impacts Accountants Today," will share how millennial-driven business trends and emerging

technology impact expectations from accounting clients, and the significance of

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