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Arianna Campbell • Jun. 22, 2023



Many firms we work with these days are well on the way to building out their advisory and consulting service lines. They're upskilling their team members to become advisors and consultants to clients. That's excellent for client-facing roles, but what about your internal team members? Your admin and operations team? Are you building internal thinkers and strategists and helping them move up the continuum of value?

Let's explore what it takes to build a successful internal advisory team: from finding your why to identifying the roles ripe for becoming internal advisors.

Building an internal advisory team

If you've created your external advisors and consultants and are ready to take the

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Internal advisory roles

Your internal advisory team doesn't have to understand accounting, tax or other areas related to the firm's practice. But like external advisors and consultants, they should clearly understand their client's needs and objectives to appropriately tailor advice based on those goals—the client being your firm.

For example, you may have an admin team member in charge of your firm's workflow management system. If you keep them in the technician role, their value to the firm is limited to knowing what's happening with your workflow. However, if you help them elevate their position, they can start gathering insight from the data provided by your workflow management system. Then they can begin advising the firm on what it can do to run the business better.

Other team members that can elevate their roles include:

- Marketing
- Business development
- HR
- Billing
- IT
- Process
- Internal budgeting
- Internal accounting and finance
- Purchasing
- Benefits
- Learning and development

How to elevate roles

Today, there is a growing gap between the automation of work and workers'

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to advance your career. For example, your marketing team may get training in AI or sophisticated approaches to marketing automation. Training and certifications can make a huge difference in the value they deliver to the firm and their future career path.

- **Reskilling** involves learning new tools and approaches for a whole new profession. This can be a tough transition. It requires excellent training and supportive managers willing to invest in someone from a different area of the firm. For example, an admin person might have the right personality and perspective to take on a business development role. Still, the language, systems, technologies, and definitions of success will vary dramatically.

Regardless of your approach, the key is finding the right personnel to fill each role. This requires careful consideration, understanding the positions and their objectives and sometimes a trial period to ensure it's a good fit.

Once you have identified the ideal personnel for each role, the next step is providing training and guidance. This could include formal education programs, internal learning and development curriculums, mentorship programs, apprenticeships, certificate programs, and specialized training.

By helping employees upskill and reskill, you can ensure they have the skills and knowledge to provide the best advice tailored to the firm's unique needs, goals and financial objectives.

As the accounting profession and the business world continues to evolve, it's essential to elevate internal support roles alongside external advisors and consultants. Your firm's culture should emphasize effective collaboration and alignment between external and internal team members, recognizing everyone's contributions. Working together, they can create a stronger, more sustainable business.

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