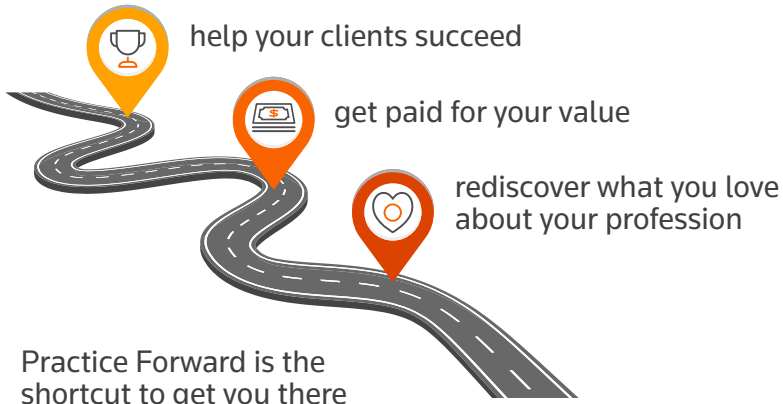


# Practice Forward

The roadmap to achieve advisory-focused client relationships

## You can



Practice Forward is the shortcut to get you there

Thomson Reuters® Practice Forward is for any accounting firm who is ready to:

- Stop giving their value away for free
- Provide clients with proactive service
- Improve work-life balance firm wide
- Make more money with fewer clients
- Prioritize client relationships over transactions

"It's just been 4 or 5 weeks since we've started the [Practice Forward] implementation, but we've closed 5 clients and we're already at about \$45,000 in recurring revenue."

— *Estee Horn, Horn Fulton, Inc. Certified Public Accountants*

## Guidance, proven methodology, and tools to help you:



Implement a proven sales process to engage new clients



Define your service offerings and pricing strategy



Standardize and support advisory service delivery



Transition existing clients to advisory relationships

## Real results with Practice Forward:

**2.5x**

More than double existing client billings\*

**3x**

Triple new client billings\*

**2-3 months**

Practice Forward pays for itself\*

"The residual effects of Practice Forward has probably been what is the best part of the investment... The connections that I have made with other practitioners, and really deciding and allowing myself to operate a firm instead of being buried alive inside the firm working... I don't think I would have ever gotten there on my own."

— *Erin Heath, Erin R. Heath, CPA*

\* Averages of data provided from existing Practice Forward firms who have completed their implementation

## What you get with Practice Forward:

### To get the system in place



#### Over 190 internal and client facing templates and tools

- Proposal templates
- Pricing calculators
- Advisory service delivery aids
- Checklists and process documentation



**Personalized consulting** with an experienced Practice Forward consultant. Your consultant is dedicated to helping you get real results and maximize success.

### To continue the journey



**Connection** to a community of forward-thinking practitioners like you through the online Practice Forward Group, and various collaborative events. When you join Practice Forward, you join a network of collaborative and passionate professionals.



**Ongoing support** for continuous progress in your advisory journey. Receive support by attending monthly Advisory Office Hour sessions hosted by Practice Forward consultants, and attend CPE qualified webinars covering relevant and valuable topics.

## Better Together: Practice Forward and Ignition



Automate how you engage clients, get paid, and renew engagements with Ignition, the world's first client engagement and commerce platform for tax and accounting professionals. Save hours on time-consuming administrative work so you can spend more time helping your clients and leading your firm.

### Automate your **client engagement process**



Generate proposals and engagement letters with ease.



Deliver digital proposals that are impressive to receive and easy to sign.



Collect payment details upfront when clients sign your proposal. Recurring payments are handled automatically so no one has to lift a finger.

Ready to get real results that improve your firm's bottom line?

For more information about Practice Forward, call us at 800-968-8900. [tax.tr.com/practice-forward](https://tax.tr.com/practice-forward)