

ACCELERATING THE
HALLMARKS OF
LEADERSHIP

Firm Revenue Segmentation

THE PROBLEM

When partners view their clients as “my book of business” they are operating with a silo mentality.

This can hinder a firm's growth and bottom line. However, many firms operate this way.

SO HOW DOES A FIRM DEVELOP A CULTURE WHERE CLIENTS ARE “FIRM CLIENTS” RATHER THAN “MY CLIENTS”?

A one firm entrepreneurial approach to management leads to a well-managed firm.

Easier said than done?

Yes.

Achievable?

Yes.

It begins with how your firm approaches its financial information.

Summary of Key Performance Indicators					
Industry & Service Segments	Revenue Δ		Hours Charged Δ		EBITDA
	Dollar Δ	% Δ	Hours Δ	% Δ	
	\$1,649,714	5.5%	(2,156)	-1.1%	
Attest Services	28,515	29,650	55,906	-	-
Audit Services	979,762	160,584	1,419,614	171,481	1
Compilation Services	50,363	-	-	21,712	-
Peer Review Services	-	-	-	-	-
SSARS Services	21,716	-	-	-	-
Review Services	51,658	-	-	40,807	-
Other Assurance Services	-	-	-	-	-
Total Assurance	1,132,014	190,234	1,475,520	234,000	1
% OF SL	12.0%	2.0%	15.7%	2.5%	
Tax Business Services	719,774	29,436	3,208	269,635	-
Tax Family Services	-	-	-	-	-
Tax Individual Services	4,747	-	-	12,974	-
Tax International Services	-	-	-	87	-
Other Tax Services	-	-	-	-	-
Total Tax	724,521	29,436	3,208	282,696	
% OF SL	4.7%	0.2%	0.0%	1.8%	

FEATURES & BENEFITS

Customizable Features:

- Multiple time period views at a glance including monthly; month to date; trailing periods; multiple years; and, year over year.
- Hierarchical-based service line & industry drill downs that can enable topline or detailed sub-level results.
- Summary KPI change statistics.
- Options for viewing: by partner, service line, industry, client size, location.

Benefits:

- Dramatically saves time (what took 5 hours **now takes 5 minutes**), increases accuracy & makes financial analysis more thorough for Managing Partner and segment leaders going forward.
- Shows how different business segments contribute to bottom line results, enabling firms to identify strategies for future success.
- Places emphasis on firmwide coordination of decision making, cooperative teamwork and institutional commitment.
- Encourages a multi-disciplinary client service approach with enhanced coordination among audit, tax and advisory teams.



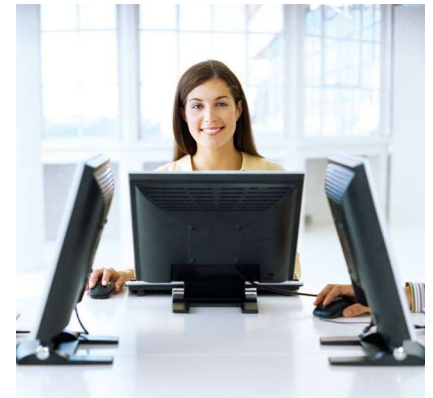
GETTING STARTED

Our pricing structure is customized and designed to allow firms of all sizes to realize the tremendous benefits that our analytics approach has to offer.

WHAT IS REVENUE SEGMENTATION?

When firm revenue is properly segmented, many insights materialize, including a client-driven strategic approach led by the right leaders and specialists. Akseshen's Revenue Segmentation framework enables us to:

- Extract and revitalize revenue information, focusing on the intersection of your service lines and client industries, rather than on book of business.
- Work with your leadership team to align the revenue segmentation with firmwide strategic goals and with your systems people to overcome data extraction obstacles.
- Automate the data population process for future ease and flexibility.



OUR APPROACH

When we partner with you; we listen diligently and take the time to completely understand your specific needs; working to achieve these goals in the most simplistic, sustainable and time efficient manner. Our tenants:

- Collaboration – Working together and creating useful analytics.
- Simplicity – Creating easy to understand and use analytics.

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Akseshen is a boutique full service Data Analytics firm that works exclusively with accounting firms. Our team of former auditors can help you overcome challenges related to internal firm analytics, driving efficiency within client engagements, training and additional service offerings.

Powered by Akseshen LLC – Do Meaningful Work