



Firm Forward: A Journey From the Land of Compliance to the World of Reliance

Edi Osborne

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Firm Forward is a business fable that takes you on a journey with Bennie Stewart, a newly appointed managing partner of a CPA firm. Bennie's promotion to managing partner comes at a time when the firm is in crisis having just lost their two largest clients and two of their best and brightest team members. Bennie must find the answer to these three questions: 1) How to differentiate and grow the firm in a post-recession, new normal business environment. 2) How to attract and retain ideal clients. 3) How to attract, retain, and accelerate the professional development of his team members. All three of these issues point to one answer: Level 5 Service. Level 5 Service is a structured approach to delivering high-value advisory services. The Level 5 Service model has generated over \$100million in new, non-traditional revenues for firms across North America. Level 5 Service is the cure for Random Acts of Consulting. The practical logic embedded in the Level 5 Service continuum makes it easy for any practitioner to immediately add-value to their client relationships. This book provides a step-by-step how-to for practitioners who want to live up to the moniker of Trusted Business Advisor.

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