The Challenge

Accounting firms are at a crossroads. Automation is reshaping audit and compliance, making traditional services less profitable. Firms must evolve—offering strategic advisory to retain clients, attract new business, and unlock new revenue streams. But many lack the expertise and technology to make this transition seamlessly.



What it takes:

- ✓ Proficiency in financial forecasting and analytical techniques
- ✓ Comprehensive understanding of managerial finance
- ✓ Ability to transform data into actionable insights
- ✓ Robust data and technical competencies
- ✓ Access to enabling technologies

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Your Guide

Acamar Consulting is your trusted partner in building and scaling strategic advisory services. With deep expertise in financial forecasting, analytics, and enabling technologies, we help firms confidently step into the future—equipped with the tools and knowledge to deliver high-value insights to clients.



Andrew Winter

Andrew works closely with clients to develop tailored solutions to address their challenges, realize their vision, and ensure client service excellence.

Andrew has over 20 years of experience in finance, financial system implementations, and project management. Prior to founding Acamar Consulting, he worked with and consulted for Fortune 100 companies across several industries, implementing FP&A and accounting systems, strategic cost controls, governance processes, and enhanced analytics.

Email | LinkedIn | Calendly



Jeremy Jones

Jeremy is an accounting leader with more than 20 years of executive experience in driving success through strategic planning, financial management, and process optimization.

A proven expert in driving profitability through strategic financial and operational insights, Jeremy helps businesses leverage AI to optimize finance processes and systems integration. His expertise and guidance continuously produce innovative revenue creation and strengthen confidence in data analysis and reporting.

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The Plan

Build a Scalable Advisory Offering

We help firms define and structure their advisory services, ensuring they align with client needs and market demands.

- Identifying high-value advisory opportunities within existing client relationships
- Designing repeatable processes to scale advisory services efficiently
- Training teams to shift from transaction-focused work to strategic guidance

Integrate Cutting-Edge Financial Technologies

Strategic advisory relies on data-driven insights using the right tools to collect, analyze, and present financial intelligence.

- Acumatica for ERP and operational insights
- Prophix for budgeting, forecasting, and financial consolidation
- Alteryx for advanced data analytics and automation
- Power BI for interactive financial storytelling

Leverage Internal Resources Efficiently

Many firms already have untapped expertise within their teams.

- Identify internal talent capable of delivering advisory services
- Optimize workflows to free up time for strategic engagements
- Implement automation to reduce manual tasks in audit and compliance

Drive Client Relationship Value

Clients increasingly expect proactive financial guidance.

- Develop customized advisory solutions tailored to client industries
- Implement data-driven reporting that enhances client decision-making
- Position firm as long-term strategic partners rather than transactional service providers

Grow Revenue Through Advisory Services

By transitioning into strategic advisory, firms unlock new revenue streams beyond traditional compliance work

- Structuring pricing models for advisory services
- Marketing new offerings to existing and prospective clients
- Establishing long-term engagement strategies for sustainable growth

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The Tools

Strategic advisory relies heavily on data, making it essential to have the right technologies for collecting, projecting, and analyzing data to present your recommendations to clients.

For firms or clients lacking the necessary tools, our cloud-based suite offers a small-business-friendly, future-proof solution—empowering teams to deliver impactful results.

Acumatica

Acumatica is a versatile and highly customizable cloud-based ERP solution. With its user-friendly interface, scalable licensing options, and open architecture, it offers exceptional ERP value tailored to the needs of small- and mid-market organizations.

Acumatica gathers detailed operational insights essential for effective planning and analysis that ultimately drive strategic insights.

Prophix

Designed to shape the future of your organization, Prophix is a robust and intuitive platform for budgeting, forecasting, and consolidation. It empowers you to set goals, respond to shifting market dynamics, uncover new opportunities, and ensure team accountability.

Seamlessly integrated with your accounting system, Prophix equips leadership with clear insights into the future of the business.

Alteryx

Alteryx is a powerful data analytics platform designed to streamline data blending, preparation, and advanced analysis through its intuitive drag-and-drop interface. It transforms complex workflows and large datasets into actionable insights within minutes.

By boosting advanced analytic capabilities, Alteryx empowers organizations to make faster and more informed business decisions.

Power BI

Combine all your data into a cohesive, interactive narrative. Use a single, powerful tool to present leadership with a clear picture of where the business stands today, where it's heading, and the reasons behind its journey.

Power BI tells your business's story, showcasing successes, identifying areas for improvement, and equipping leadership with actionable insights for growth.

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Next Steps

Unlock Long-Term Success with Acamar's Subscription-Based Advisory Services

Transitioning into strategic advisory doesn't have to be risky or resource-intensive. With Acamar's subscription model, your firm gains expert guidance, scalable solutions, and financial flexibility—without the burden of hiring or large upfront costs.

- ✓ We're invested in your long-term success—your growth is our priority
- ✓ Minimize risk—seamlessly integrate advisory services without disruption
- ✓ Scale effortlessly—adjust services as your firm evolves
- ✓ Expertise on demand—access top-tier advisory without expanding payroll
- ✓ Low upfront costs—start without major financial commitments

Key Topics to Consider

- How is strategic advisory currently defined and utilized within your firm?
- Is your firm aiming to build an advisory practice, enhance an existing one, or collaborate with a specialized partner?
- What advisory topics are most relevant to your clients—tax strategy, financial forecasting, cost management, or others?
- What internal obstacles impact your ability to provide strategic advisory services effectively?
- How can your outsourcing partner add the most value to your firm's advisory offerings?

Who Should be Involved

- **Managing Partner** – Ensures the firm's strategy aligns with outsourcing decisions.
- **Advisory Services Lead** – Evaluates outsourcing's impact on existing advisory offerings.
- **Operations Officer** – Assesses workflow integration and operational efficiency.
- **Key Advisory Practitioners** – Provide insights on service quality and client experience.

Let's explore how Acamar can help your firm confidently step into the future.

Schedule a conversation today!

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About Acamar

Acamar leverages the latest technology to deliver planning, analytics, and AI-powered solutions tailored to help business drive smarter decisions and sustainable growth.

At the heart of what we do is a simple promise: enable clarity, control, and confidence through data. That means:

- Clear visibility into your operations and key drivers
- Improved financial control and streamlined processes
- Scalable and flexible technology to enable new capabilities

Acamar's solutions put you in control so that your team can effectively and holistically define your company's vision, streamline operations, identify opportunities for optimization, and meet financial targets with real-time insights and synchronized management tools.

While projects come to an end, our relationships don’t—we're always available to ensure your business’ continued success.



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