COLLECTIVE BY DBA

Client Accounting and Advisory Services

CFO Meeting in 5

1 Connection

Build rapport by catching up with the client on a personal, friendly level.

2 Values and Priority Investigation

Investigate the client's values and priorities through asking open-ended questions with the intent to understand and collaborate.

3 Financial Analysis

Dedicate time to discuss the client's financial statements and KPI progression.

4 Strategy

Present necessary adjustments, improvement areas, and new opportunities to help the client's business and leadership flourish.

5 Action Plan

Develop an action plan based on the client's top priorities that will allow the client to execute and make progress between their scheduled CFO meetings.