

Creating happiness and building business value.



Business Consulting Team Somerset CPAs

At Somerset CPAs, we want to do all we can to help our clients on their journey to greater prosperity. That means several things, not the least of which is being proactive—actively looking for areas where our expertise will help you get where you want to go faster and safer.

With that end in mind, we have developed the Somerset Business Consulting System for you to follow in your quest for skill development. **The purpose of the system is to develop a Playbook for your business that focuses on building strong skills in mission critical areas.**

Through the Somerset Business Consulting System, we will provide you with the tools you need to implement this system and create your Playbook—goals, purpose, rules, strategies, acquiring and keeping fans, positions, players and scoreboard. One way we deliver the Somerset Business Consulting System is through the Somerset CEO Series, which is a combination of group meetings and individual coaching and mentoring sessions over a 20-month period.

We have also developed corporate training courses on a wide range of subjects—business development, customer service and management and leadership—that are designed to meet the educational needs of your employees and your organization. We believe your group will benefit from **our content rich presentations and high-energy delivery.**

We customize our business consulting services to the exact needs of each client situation. To help evaluate the needs of your business, we developed the 7-Needs Questionnaire. The 7 areas covered are Business Profitability Improvement, Tax Planning, Wealth Creation, Risk Management, Succession Planning, Technology and Finance.

We regularly reach out and interact with our clients and the business community through our Success Strategies Blog. The ultimate goal of the blog is to explore leadership and management principles that will help organizations reach their full potential. **We are passionate about helping you succeed.**

Find out how Somerset CPAs can help you look at your business in a new way.

Call 317-472-2200 or 800-469-7206 today and request a complimentary initial consultation.

Business Consulting Team Services Offered

The Somerset Business Consulting System

- Two-page business plan
- Two-page strategic plan
- Management control plan
- Marketing, sales and customer service plan
- Organizational chart
- Player development plan & recognition and reward plan
- Operating budget, cash flow projections, key metrics, ratios and risk management

The Somerset CEO Series

- Providing an overall business consulting system and tools—The Playbook
- Providing group training by a business consultant with 25 years of experience
- Providing individual coaching, mentoring and accountability sessions with the facilitator
- Encouraging collaboration among participants within a confidential and secure environment
- Creating friendly competition and mutual accountability among participants
- Promoting business networking within the group and generating lifelong friends and business partners

Corporate Training Services (Summary of Topics Below)

- Human Resources
 - Recruiting
 - Retention
 - Team Building
 - Maximizing the Return from Your Human Capital
- Customer Service
 - Classifying Your Customers and Developing a Customer Service Strategy Accordingly
- Leadership and Communication
- Strategic Planning
- Management Control Plan
 - Critical Success Factors (CSFs) and Key Performance Indicators (KPIs)
- Marketing and Sales
- The Four Ways to Grow Your Business and Profit Improvement Strategies
- Competitive Analysis and Value Chain Analysis
- Time Management and Execution
- Good to Great
- Organizational Deadly Sins
- Vision, Mission & Values
- Customer and Product/Service Profitability Analysis
- Financing Your Business Strategies

*Paul Bosler, Chief Executive Officer
MS Fluid Technologies*

“Somerset provides unique and far-reaching business consulting services. They have assisted me in developing as an executive, both in how I work personally and how I work on my business. They are credible because they have experienced first-hand what they are talking about.”

Somerset CPAs

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