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Advisory 2030:

Skills to Future-Proof Your Team and Drive Business Advisory Success

cg chartergroup

Annual Conference
22nd October 2026



Gill Burn
Regional Director
Mindshop

Why should we build greater advisory skills and services into what we do as CharterGroup firms?

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In a world, where the cost of answers is dropping to zero, the value of the question becomes everything...

Ref: The AI Paradox: https://www.youtube.com/watch?v=dcolM6W5Odc


I think we may have a solution to all our problems.
AI
TOM FISH BURNE



TRUST

IS THE NEW CURRENCY AS WE HEAD TOWARDS 2030

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Conflict of interest

Deloitte to refund government, admits using AI in $440k report



Deloitte will issue a partial refund to the government after admitting that artificial intelligence had been used in the creation of a report littered with errors.

- **Academics raise alarm over suspected AI use in Deloitte report**
- **Deloitte report suspected of containing AI invented quote**

EY retracts study after researchers discover AI hallucinations

Stephen Foley

May 17, 2026 – 8.21am

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3 min

New York | EY has withdrawn a study on loyalty rewards programs that included apparent artificial intelligence hallucinations and fake footnotes, in the latest example of a professional services firm being led astray by the new technology.

The study, which was used by EY consultants in Canada to market their cybersecurity business, used made-up data, misattributed citations and referenced a McKinsey report that does not exist, online researchers discovered.



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Lots to think about as Firm leaders



Attraction / retention team

AI leverage and integration

Technology stacks

Referrals

Capacity / Time

Growth & Profit

Financial Advisory

Business Advisory commercialisation

ESG

Niches

Pathways to partnership

Advisory mindsets / skill-sets in the team

Generational shifts

Succession planning

Private Equity / New models

Leadership capabilities

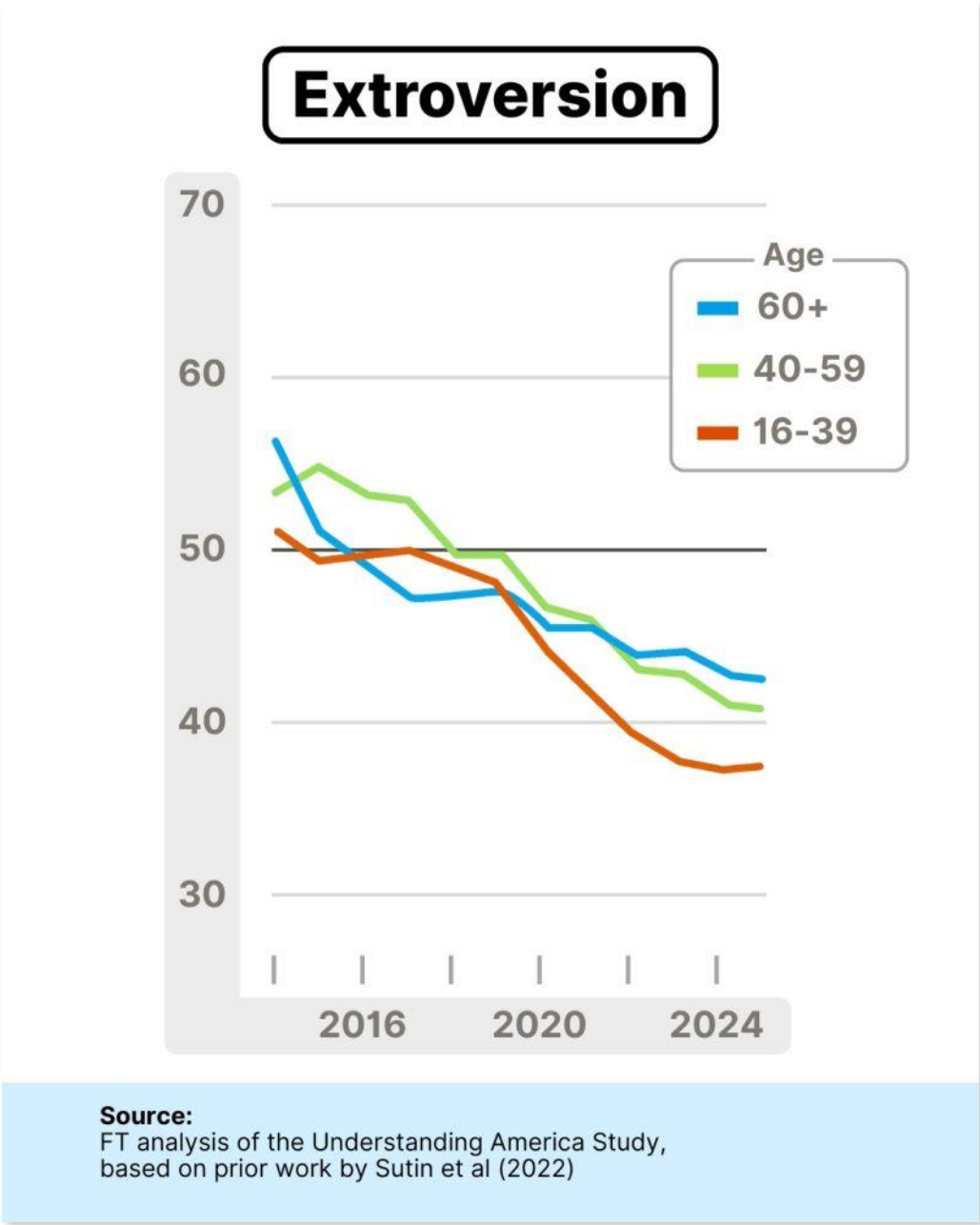
Technical Training

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BIG NEED FOR CURIOUS ACCOUNTANTS IN AN AI WORLD

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Ref: https://www.linkedin.com/posts/juliussolaris_a-few-weeks-ago-at-an-event-someone-told-activity-7376272633249660930-1VGV/

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A BRIGHTER WAY OF THINKING

ACCOUNTANCY | FINANCE | BUSINESS

CONTACT US OUR SERVICES



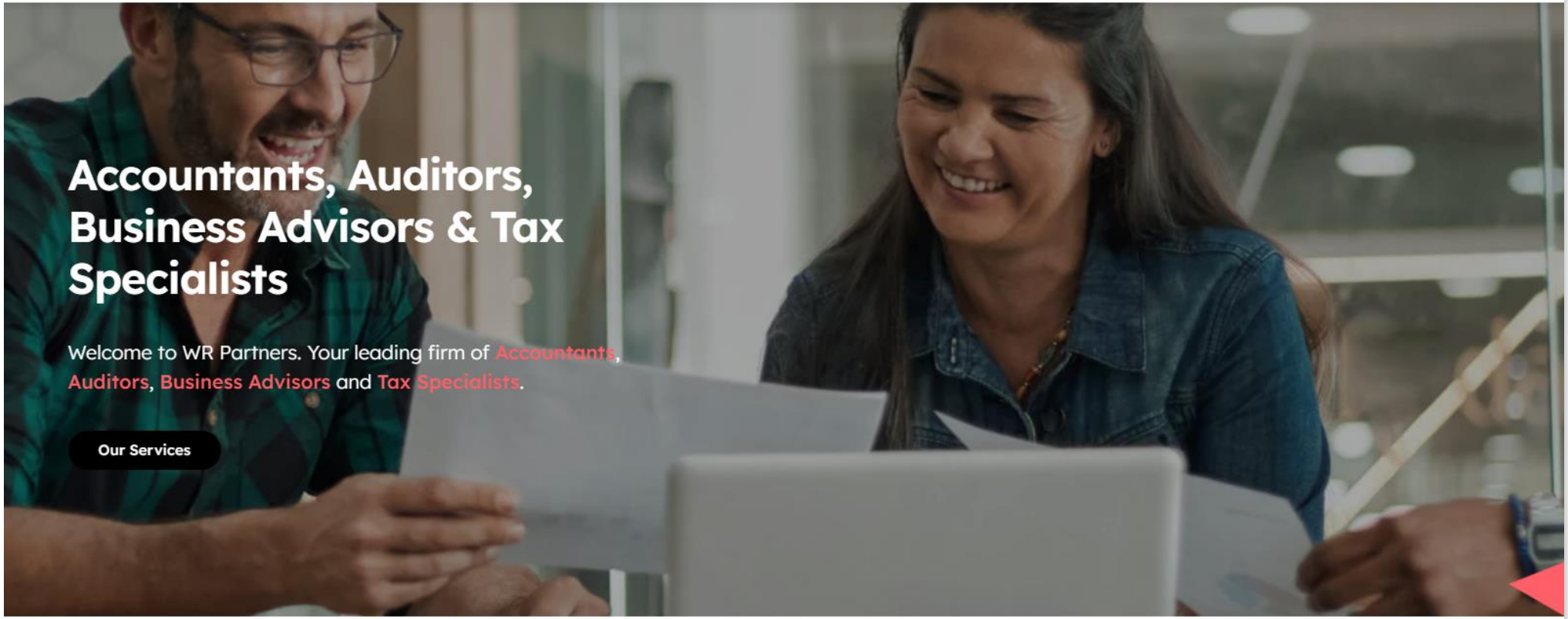
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Making Tax Digital for Income Tax, From 6 April 2026. Here's what it means for sole traders and landlords.

Henderson Loggie

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WE NEED TO
ACT AS
FACILITATORS
IN A WORLD
NOT PLAYING
TO THE SCRIPT

Key reasons to Integrate Advisory well?



Move beyond pure compliance

with freed up time from AI productivity gains to drive greater revenue and bring advisory skills / culture across the firm.



Attraction / Retention

of quality team members and high value clients that want an advisory focused firm

What are the Advisory skills we need to build for 2030?



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2030'AI Augmented' Advisory Leaders

1. AI Insights

Claude

Copilot

Gemini

Grok

ChatGPT

2. Enterprise AI Assistants / Tools

Communication & EQ Skills

Strategic & Decision Making Skills



AI Augmented Advisory Leader

Change & Implementation Skills

AI Augmented Advisory Services

- **Strategic Planning** £4k- £10k each
- **Implementation support** £300 – £3k per month
- **Client Workshops** £1.5k -£3k each
- **Problem solving meetings** Hourly rate
- **Business Health Checks** £750 -£2k each

Advisory Education

- Train Advisory skills across all team (Sales / Meetings)

Advisory Integration

- Pathways to partner across the firm
- Coach and develop people across the firm
- Other Services (Audit, Tax, Corporate Finance)

Faster / Smarter Outcomes internally & with clients

Lynsey Light • 1st
Director of Business Advisory at Kreston Reeves ✨ Advising busines...
9mo • Edited •

Home from a great team away day with Kreston Reeves A&O service line! It was interesting to hear updates and get to know the team more, followed by a great session with Alex Bond Burnett ACC on personality types and then a look into the future (didn't you know we have a crystal ball? 🔮🥰)

A highlight was being able to give certificates to this amazing group who have completed their Mindshop advisory fundamentals training and are on their way to be the advisors of the future 🙌

We ended the day with our culture and value awards, and I was lucky enough to celebrate lots of my team for their wonderful contribution to the values showing that they are making it personal, understanding, being human, looking ahead and being crystal clear 💡 well done everyone!!

#guidingyou #brighterfuture #teamawayday

Richard Sarah Jennifer Kerry Ceri Rebecca Toby Josh Rowan Hayley Max Kirsty Lali Abbey Jamie Adam Katie David Chay Rachel Alison Jessica Joseph Dayle Paul Jodie Clint Jemma



53 4 comments • 2 reposts

Like Comment Repost Send



James Mason • You
Managing Director, Mindshop - Helping quali...
8mo •

Thank you to HLB International for inviting me to present a session on day one at their Global Summit in Vancouver, Canada. It was great to share practical insights on how firms can 'Lead the Advisory Charge' and kick off our strategic partnership focused on building foundational Mindshop business advisory skills and best practices for HLB firms globally. Really enjoyed meeting and learning from so many great people during the event. Exciting times ahead in our partnership and looking forward to working with Abu Bakkar Marco Donzelli as well as the wider team.
#businessadvisory #mindshop #hlb

64 5 comments • 2 reposts

Like Comment Repost Send

Add a comment...

Most relevant

Abu Bakkar • 1st
Chief Innovation Officer at HLB International ...
9mo

Thanks for the great session James! Very insightful

Like · 1 | Reply

Amy Spillard • 1st
Building strategic relationships that support ...
9mo

Great to see you James

Like · 1 | Reply

James Mason • You
Managing Director, Mindshop - Helping quality consultants, coaches and acc...
1w •

Great to spend the day with many key leaders at Crowe Malaysia and Crowe Vietnam for today's Mindshop advisor training session in Kuala Lumpur.

Congratulations to all participants (Mindshop advisors) on successfully achieving Mindshop Problem Solver accreditation. Was terrific to present special certificates to all in attendance.

It's impressive to see the continued success in embedding advisory skills, structured problem-solving, and other advisory performance insights / tools across the firm, client work and service lines. Strong leadership support continues to be a key driver of this success, well done to all involved. Looking forward to further success and growth in 2026.
#AdvisoryExcellence #CapabilityBuilding #ProblemSolving #Leadership #Mindshop #Crowe #BusinessAdvisory



Chris Mason PhD and 42 others 1 comment • 3 reposts

Brenton Lawrence • 1st
Director at Nexia Perth | Helping businesses achieve their goals and aspirati...
5mo •

The Now Where How philosophy is something Nexia Perth uses to ensure our clients are always moving in the right direction. Adam Smith perfectly encapsulates this in his article below. ...more

Adam Smith • 2nd
Tax and Business Services Director at Nexia Perth | Advisory. Tax. ...
5mo • + Follow

While New Year's resolutions may be fading for some, small businesses have been in full swing since July. Now's the perfect time for small businesses to grab a coffee, review their 6-month financials, and work through the ...more



Mid-Year Financial Check-In: 7 Steps to Strengthen Your Small Business
Adam Smith

24

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Help Me Grow

Whether you're running a successful operation and looking to take it to the next level or find yourself struggling to generate cash flow, Harris Black will work with you to understand your business and optimise your success. Move forward with confidence as we guide you through complexity and drive momentum for your business

Area of Focus			
Business	**Business Health Check** When was the last time you reviewed the health of your business? Annual 90min workshop $2,000 + GST	**Strategic Planning** Engage with us to implement a strategic plan to accelerate your growth and profit 1/2 or Full Day Contact us	**Quarterly Business Review** Detailed Analysis of your business and 90 day action plan Quarterly 2.5hr meeting Contact us
Self	**Business Leaders Forum** High impact learning with an immediate practical focus – peer group collaboration Quarterly 3hr workshops $75 single ticket $100 bring a friend	**Time & Priority Mastery Course** Effective time and priority management is key to achieving personal success 8wk course: 30min weekly + 3 x 1hr online workshops $750 single ticket + group discounts	**Accelerating Leader Program** Bespoke courses to improve you and your team – Self, Leadership or Business Mastery Self-paced Contact us



Help Me Comply

Whether you're running a successful operation and looking to take it to the next level or find yourself struggling to generate cash flow, Harris Black will work with you to understand your business and optimise your success. Move forward with confidence as we guide you through complexity and drive momentum for your business



https://www.harrisblack.com.au/solutions/

Discuss in pairs

Where are the key advisory skills gaps for you or your team over the next 12 months?.
Is it areas 1, 2 or 3?

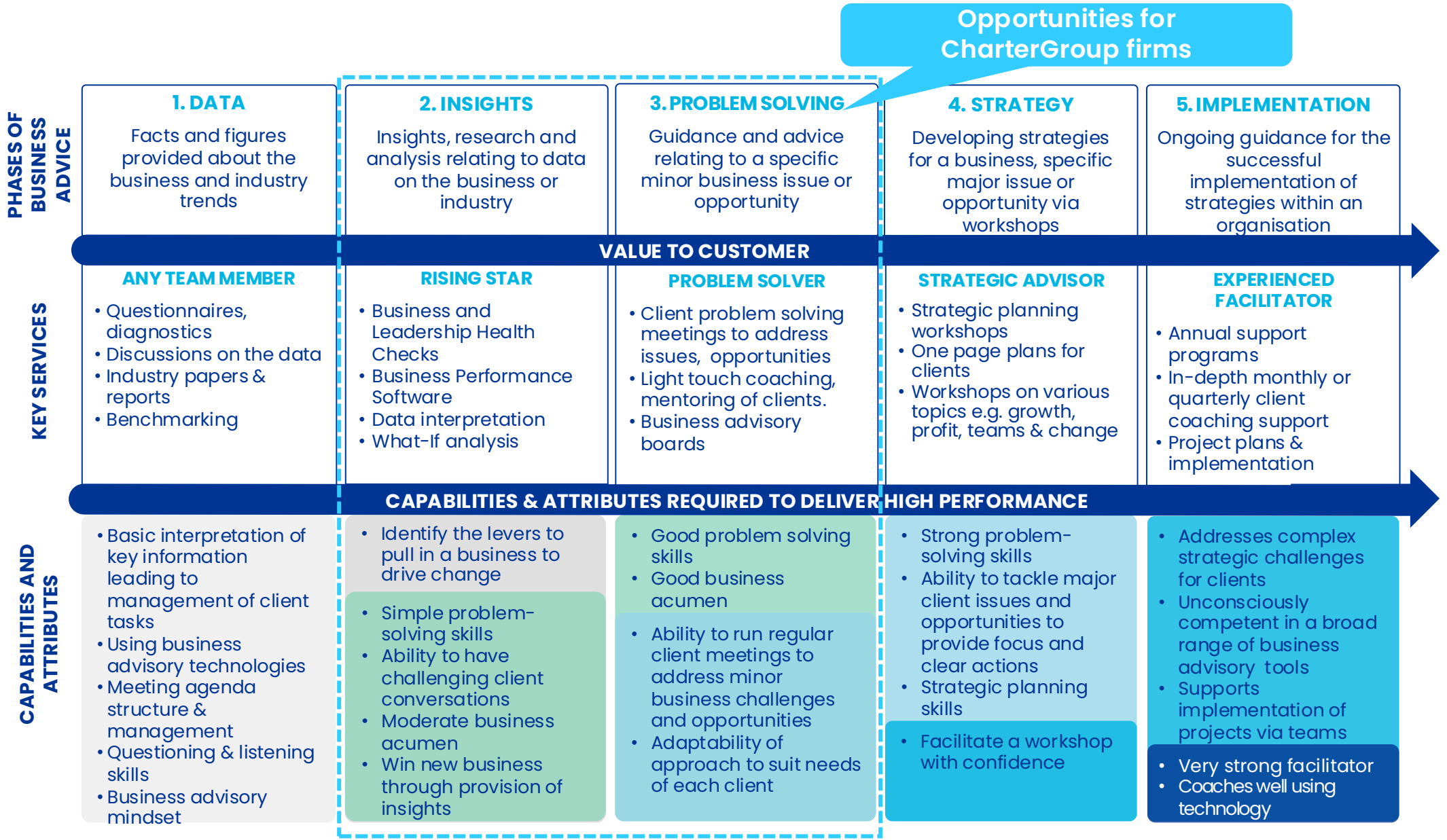




No shortage of advisory opportunities for firms with the right capability and capacity levels



Mindshop's Five Phases of Business Advisory Success



AUGMENT

UNLEARN



RELEARN

Diagnostic tools – Pre-work

Take Your Diagnostic Test Today

HEALTH CHECK FOR NOT-FOR-PROFITS

Take a moment to "hit pause" and refocus on what truly matters for your organisation. Our Healthcheck is designed to help you critically assess your organisation's current performance—what's working, what's not, and where change is needed.

START NOW →

GROWTH AND PROFIT DIAGNOSTIC

Are you struggling to prioritise your business issues and opportunities? Do you need clarification on which strategies will accelerate the growth and profit of your organisation? Take 5 minutes to complete the 28-question Growth and Profit Diagnostic to identify from 12 key success factors.

START NOW →

CHANGE SUCCESS DIAGNOSTIC

Research tells us there is only a 30% probability your change initiative will succeed. This is because most organisations/people adopt a 'trial and error' approach to change incurring a high cost in terms of lost time, reduced confidence, wasted money and poor resource utilisation. But you can improve this probability of change success.

START NOW →



1. Summary

These grouped diagnostic results relating to the Growth and Profit Diagnostic reveal **strong performance in agility, implementation, and technology**, showcasing the business's ability to adapt, execute, and leverage tools effectively. However, **weaker areas in culture, systems, and people** highlight opportunities to enhance team dynamics, process efficiency, and talent management. Use these overall insights to guide your upcoming meeting.

2. Top 3 Overall Insights

Insight 1: Agility as a Strategic Advantage

The business demonstrates a strong ability to adapt to changing market conditions and implement efficiency strategies, scoring **5.67 (well above the 4.33 average)**. This agility is a key strength to leverage for future growth. However, there is an opportunity to formalize these practices further by establishing dedicated project teams to drive continuous improvement.

- **Debrief Question:** How can the business further institutionalize its agile practices to ensure long-term adaptability and efficiency improvements?

Insight 2: Culture Needs Strengthening

Despite strong performance in other areas, culture stands out as a weaker area with a score of **4.00 (below the 4.63 average)**. Challenges include outdated values, moderate trust and collaboration, and room for improvement in attracting and retaining quality staff. Addressing these issues could unlock greater team performance and alignment with business goals.

- **Debrief Question:** What specific actions can the business take to improve trust, collaboration, and alignment around updated core values?

Insight 3: Systems and People Require Attention

Both systems (**4.17 vs. 4.27 average**) and people (**4.20 vs. 4.50 average**) are slightly underperforming. Outdated processes, inconsistent CRM usage, and limited data visibility hinder operational efficiency. Additionally, moderate trust, training gaps, and recruitment challenges suggest the need for a more robust approach to team development and process optimization.

- **Debrief Question:** How can the business prioritize system updates and team development to improve efficiency and collaboration?

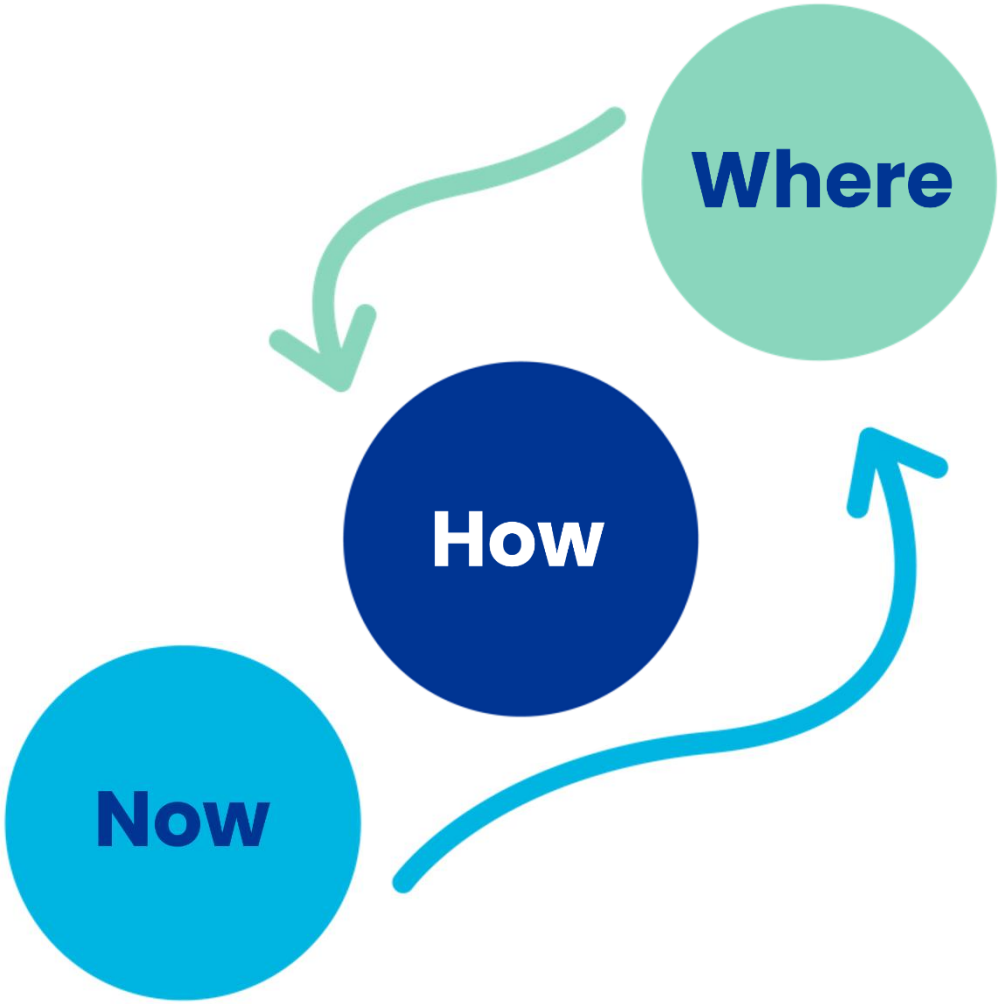
3. Leveraging the Debrief Insights in a 45-Minute Meeting

Proposed Agenda (Now-Where-How Framework):

1. **Now (15 minutes): Review Diagnostic Results**
   - Present the overall diagnostic score and highlight key strengths (Agility, Implementation, Technology).
   - Discuss weaker areas (Culture, Systems, People) and their potential impact on business performance.
   - **Debrief Questions:**
     - How can the business further institutionalize its agile practices to ensure long-term adaptability and efficiency improvements?
     - What specific actions can the business take to improve trust, collaboration, and alignment around updated core values?
     - How can the business prioritize system updates and team development to improve efficiency and collaboration?
2. **Where (10 minutes): Define the Desired Future State**
   - What does success look like for the business in terms of culture, systems, and people?
   - How can the business leverage its strengths in agility, implementation, and technology to address these weaker areas?
3. **How (15 minutes): Develop Actionable Next Steps**
   - Identify 2-3 immediate actions to address culture, systems, and people challenges.
   - Discuss how to sustain and build on the business's agility and implementation strengths.
   - Assign ownership and timelines for key initiatives.

Click to in 10 minutes get your own custom, CharterGroup 2027 business advisory plan?

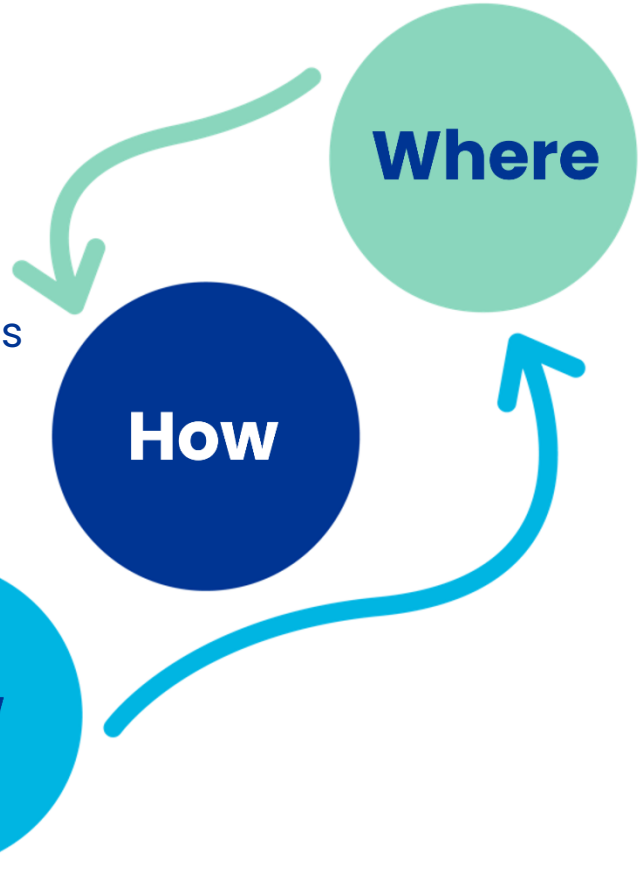
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Key Actions
- Grow sales
- Remove low profit products
- Visioning session
- Life balance exercise

Today
- Revenue = 4.5m
- Profit = 4%
- No vision
- Stressed



12 months time
- Revenue = 5.5m
- Profit = 8%
- Clear vision
- Owners with life balance

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One Page Plan

Now	Where
• Sales 4 million • 14 staff • Profit 8% • Average Sale 7k	• Sales 7 million • 18 staff • Profit 10% • Average Sale 9k

How

Strategies	Action Plans	Timing	Responsibility
Grow sales 35%	• Develop and train new sales process • Implement a referral system • Implement new website	• 14th Nov • 28th Nov • 24th Jan	• JM • SW • PH
Leadership training	• Determine list of 10 core competencies • Focus on 3-4 commercial projects • Book experienced advisor to train team	• 1st Dec • 5th Feb • 12th Jan	• JM • SW • PH
New CRM platform	• Review best practice used in industry • Short-list 3 providers. Do cost benefit • Select one to pilot with super users	• 1st Nov • 1st Dec • 10th Feb	• JM • SW • PH

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Five Why's

By repeatedly asking the question **'Why'** (five is a good rule of thumb), you can peel away layers of symptoms which can lead you to the root cause of a problem. Each time the question is answered, ask **'Why?'** again.

Why?

Why?

Why?

Why?

Why?

are our sales dropping?
Our sales people struggle to sell.

don't our sales people sell effectively?
They have not been trained properly.

haven't our sales people been trained properly?
We don't have the budget to invest in training.

don't we have a training budget for sales training?
We have low cash flow?

have we got poor cash flow?
We have poor cash collection processes.

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Exercise in pairs

Use the 5 why's process with a person next to you to hear an issue and dig down from symptoms to root causes?. After one person has done it, switch.

Why?
Why?
Why?
Why?
Why?



Powerful facilitated conversations open the doorway to opportunities

I want to grow my business

Not sure where I want to take the business...

My team need some training in leadership

I want to buy a new investment property

My business partner wants to sell the business in 3-4 years

I need a great book keeper

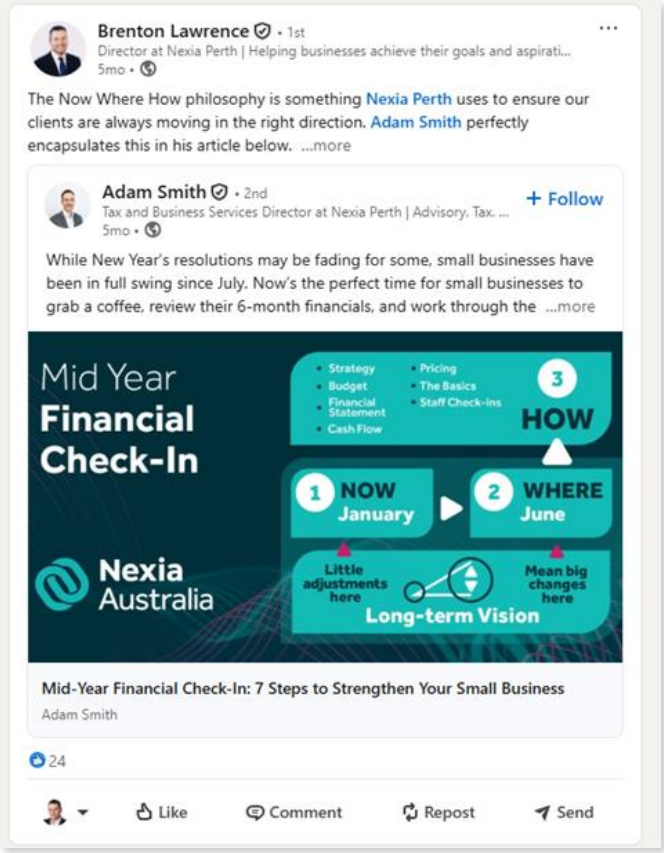
I'm stressed by my poor cash-flow

I need to lift profits by 20%

I want to expand internationally do I have the right structure?

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Examples of leveraging tools in a firm



1. **Performance review**
   - One page Plan
2. **Problem solving meetings**
   - Diagnostics
   - Now-Where-How
3. **Business Health Checks**
   - All the tools shown
4. **Tax Planning to Performance Planning**
   - Now-Where-How & One Page Plan
5. **Succession planning**
   - All the tools shown
6. **Sales – Winning new work**
   - Now-Where-How

6 steps to advisory success

6 Referrals / Marketing

- Focus on winning more from existing customers
- Demonstrate capability

5 Embrace technology

- Embrace market leading advisory technology for efficiency / leverage. Free up time for work that matters

4 Clear service lines

- Have clear packages / advisory service lines. Strategic Planning, Coaching, Workshops.
- Start simple (financial insight linked) and with friendly clients. Problem solving meetings.

3 Build capabilities

- Build the champions strategic and facilitation skills
- Build the teams critical thinking and problem-solving skills. Integrate skills into how firm drives strategy / change / integrate into existing service lines.

2 Identify champions

- Identify champions with a passion in this area to drive business advisory in the firm.
- Arm them with technology, resources, 3rd party support to build success internally and with clients.

1 Vision and Strategy

- Determine as a firm the commercial and educational goals for advisory now and into the future. Clear why.
- Have any advisory strategies clearly aligned to the firm vision

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Don’t let perfect be the enemy of good.



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Thank you for listening.

Great to be part of the CharterGroup conference

Welcome any questions?

Connect on LinkedIn
Talk to me after session

Gill Burn
Regional Director
Mindshop
gburn@mindshop.com

