



**VASAI BRANCH OF WIRC OF
THE INSTITUTE OF CHARTERED
ACCOUNTANTS OF INDIA**



Changing Gears – Transforming to a New Age Professional Services Firm

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What do Professionals want ?

- To create and sustain value
- Almost entirely driven by ability to achieve and maintain growth
- More than 90% of the value of a typical professional derives from ability to achieve and maintain future growth



Growth is a Universal Desire!!!!



Unfortunately, there is NO MAGIC BULLET to
grow a business sustainably



Good Growth vs. Bad Growth

Attitude...

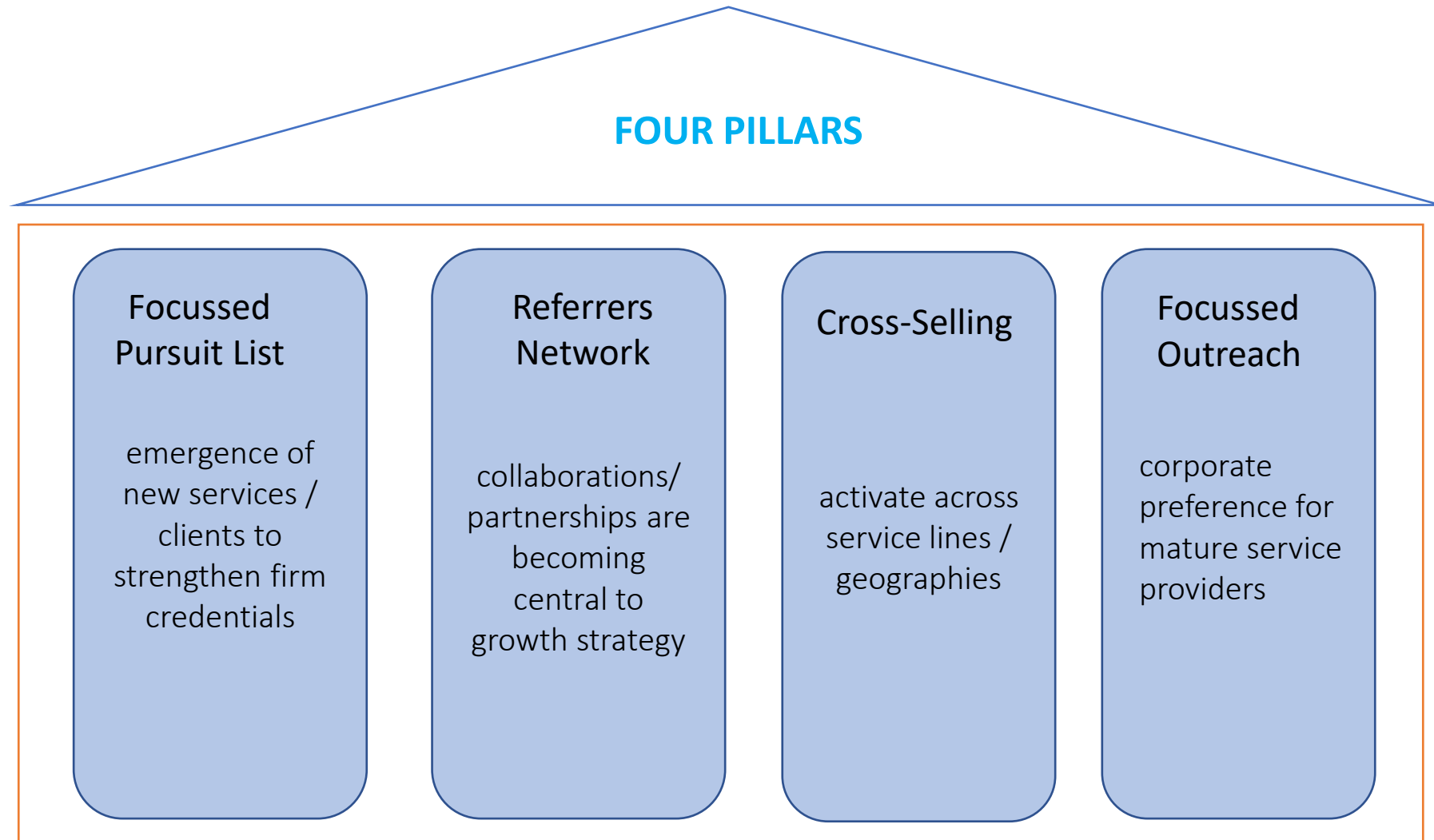


WHAT ARE WE TALKING?

- Services
- Expertise
- Geographical reach
- Experience
- Culture



More from less



Target Market + Feeders

Value Proposition

Early - Growth Co's

- Future proof their delivery & technology
- A trusted partner - an understanding of needs and insight
- Business intelligence
- Help reduce risk – continuity of service and compliance

Corporates

- Reliability/Consistency
- Timeliness
- Strong controls
- Low cost
- Fixed price/scope
- Value for money
- Transparency
- Specific services

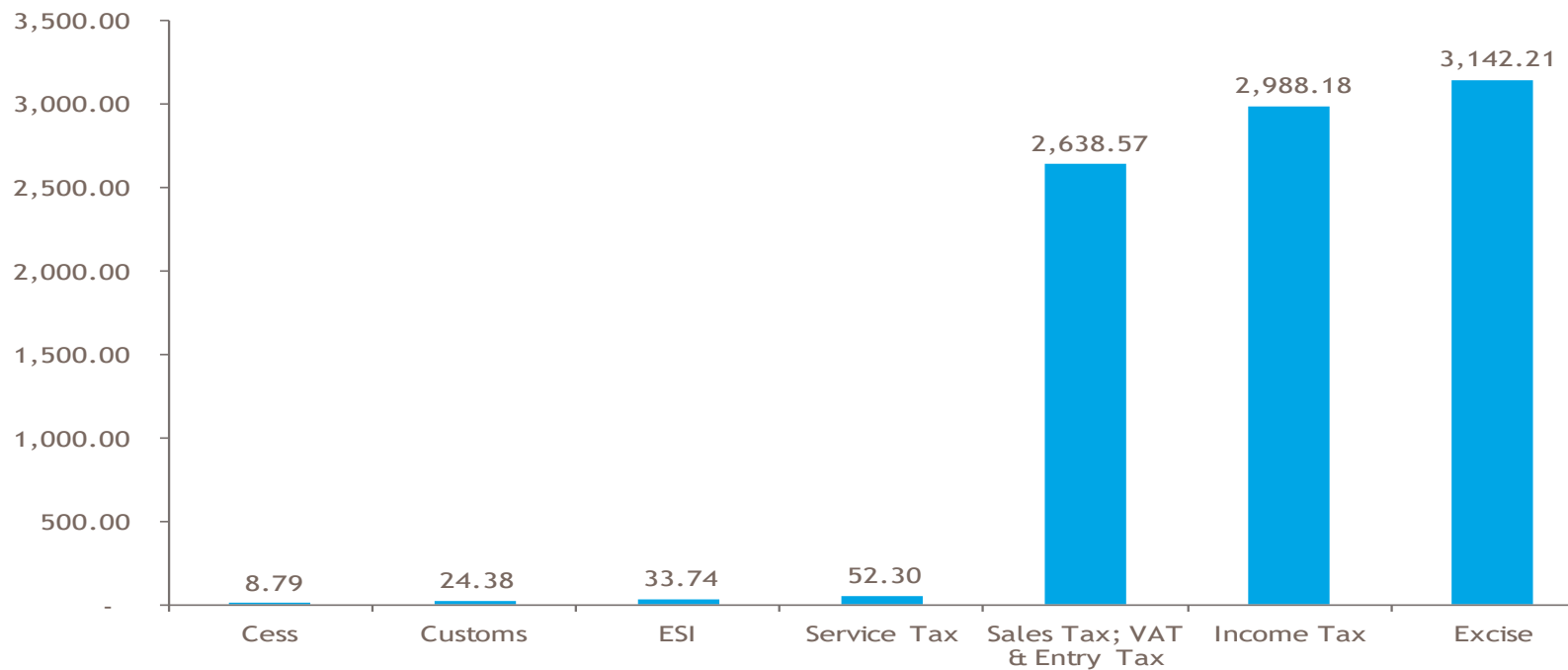
OS VISION

VC Fund → Portfolio → Services

- Market position – service offering
- Tools – technology
- People – Delivery model
- Partnerships – Digital ecosystem
- X-Border collaboration

Understand the space with Large Corporates

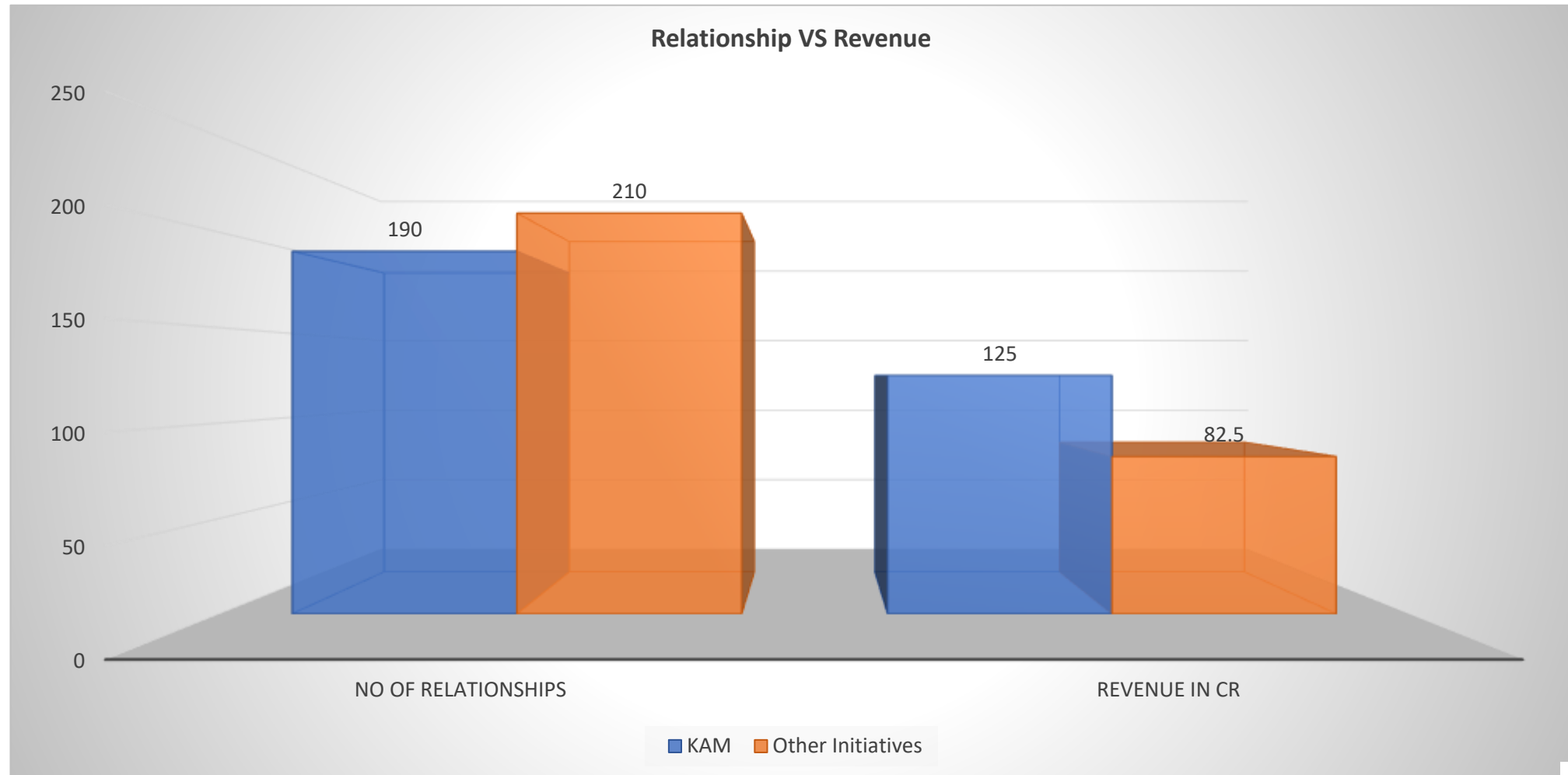
- Example: Create an in-depth analysis of Large Business Houses such as Tata Group, Aditya Birla, Bajaj, etc. Through the research business opportunities can be identified for which Partners can prepare a concept note / pitch presentation to key management.



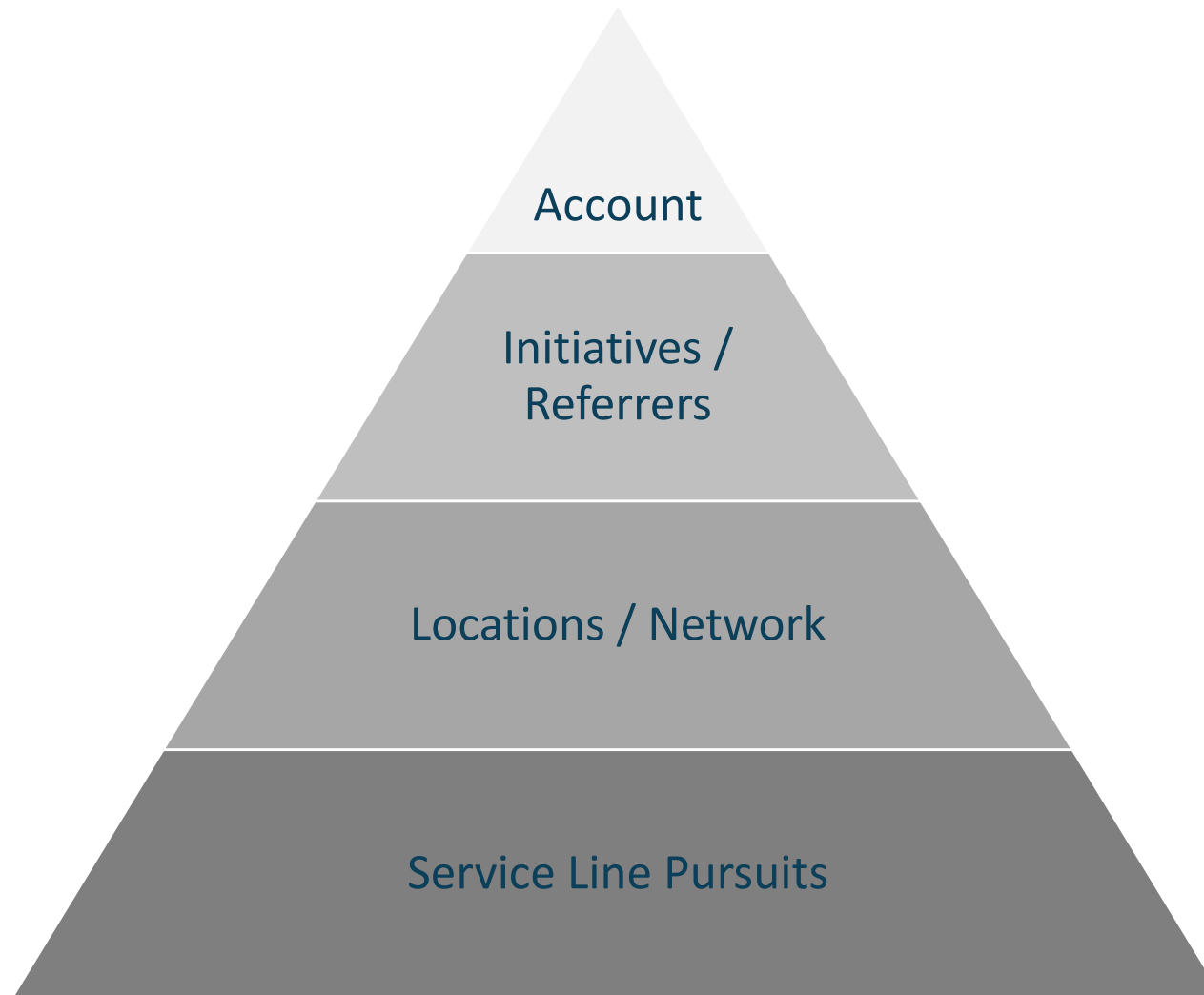
Tata Group's pending litigations with various Authorities

Tata Group has high value litigations in 3 major areas. One India's tax experts can study the details and prepare specific proposals to assist the Group on its pending litigations.

Potential # of Relationship & Revenue



Hierarchy



Preferred partner to emerging corporate

Background

- To identify fast growing small and medium enterprises (SMEs) in the country. The objective is to partner with companies and become their trusted advisor at the start of their corporate journey. This will enable us to leverage the relationship as the companies move up their lifecycle.

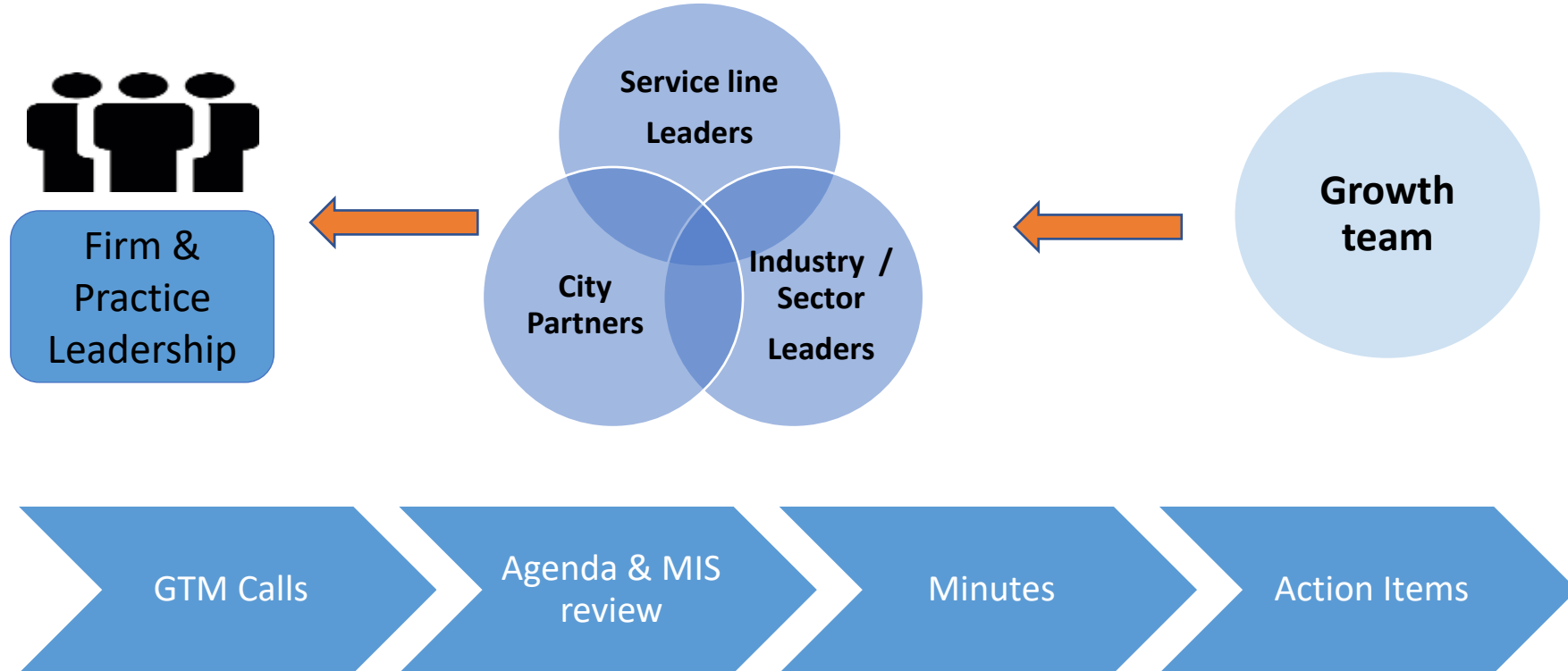
Approach

- Map and approach companies with revenue base between INR 10 - 200 crs. through support of research databases and taking inputs from Partners / Director .
- The first set of screening along with basic details such as promoter information, financial analysis, location details, auditor profile and fees etc., would be compiled.
- The next stage would be to target 20 companies and coordinate for scheduling meetings on monthly basis.

Initiatives

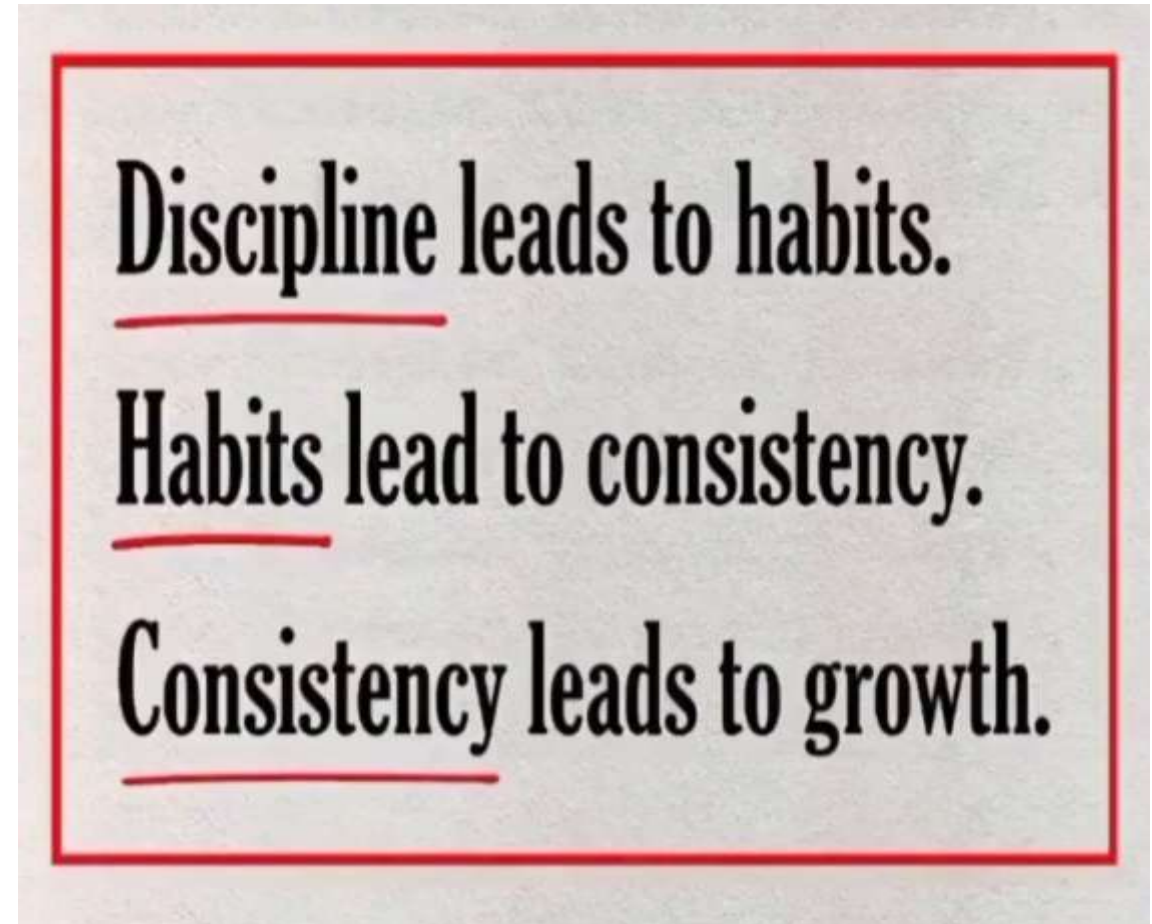
- In order to reach out to promoters / contacts, Firm association will be leveraged.
- Firm to become 'Knowledge Partner' at events organized by Chambers of Commerce / Industry Associations. Leadership would be invited to speak. This will enable networking with various promoters and key management personnel which are part of the event.
- Assist Partners to conduct small industry focused workshops. These could be 2-3 hour events specific to a particular industry / sector. Key members of 10-15 companies could be invited to boardroom / location office / venues for interactive sessions.

Periodic Review



Expectations

- Each Partner / Director to have a pursuit list of
 - Account ownership
 - Potential targets from Initiatives & referrers
- For a prospective client meeting, 2 Partners / Directors are connecting to the prospect – resulting in cross selling
- Avg 4 meetings per week – possible?
 - $4 * 52 = 208$ meetings | 100 Prospects
 - 50 Proposals | 25 Clients





What are the key areas a Professional should focus on when developing their skills?

- a. Technical expertise
- b. Client relationship management
- c. Social Media & Growth
- d. Knowledge sharing – online / offline

Answer: All of the above

Which of the following is NOT a primary objective of growth for a Professional firm?

- a. Increasing revenue
- b. Expanding market share
- c. Improving internal accounting processes
- d. Enhancing client satisfaction

Answer: (c) Improving internal accounting processes

How can a Professionals leverage social media for development?

- a. By creating a digital presence for firm
- b. By using social media to connect with potential clients
- c. By creating valuable content to attract leads
- d. By creating a strong individual Professional profile online

Answer: All of the above

What is a crucial aspect of client relationship management for a Professional firm?

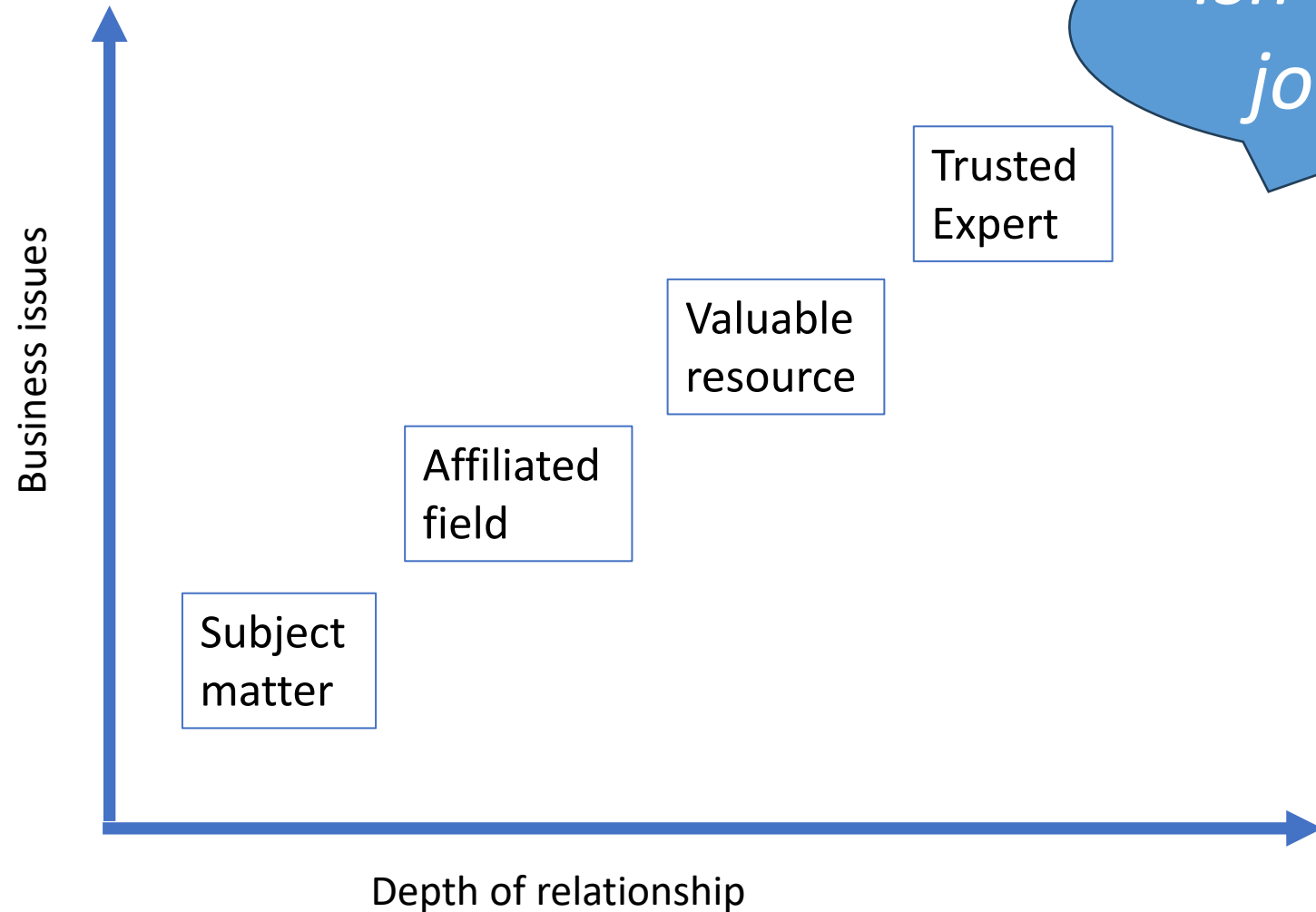
- a. Responding promptly to client inquiries
- b. Providing proactive advice and support
- c. Maintaining confidentiality and trust
- d. Knowledge sharing

Answer: All of the above



Proactive measures would accelerate momentum and fundamentally strengthen the ecosystem

Deepening Relationships



Isn't this our journey...

THANK YOU

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