



# Need help in?

1

Creating a culture of accountability that drives performance in your firm

2

Reviewing the pros and cons of different team structures and implementing team structure change

3

Reviewing and optimising your processes and technology usage

4

Dealing with partnership change and partner succession plans

5

Reviewing and integrating mergers or acquisitions

6

Creating and implementing an effective marketing plan

7

Improving your client engagement methodology to increase client satisfaction and develop more work

8

Conducting an effective partner retreat/strategy day or team day

9

Ensuring that your plans are effectively implemented and managed

10

Addressing change coming from the ATO, technology change and business generally

Every accounting firm is faced with different issues.  
We listen and create firm specific solutions. Experience delivers the how.





## David Smith

### Director

#### Qualifications

B Bus, FCA, FAICD, CISA

#### About David.

More than 40 years in the accounting industry. Hopefully, I've learnt something!

It's an exciting time for the accounting industry. Cloud computing brings new opportunities to build highly efficient practices and to become closer to clients. The internet brings great opportunity and also threats. Accountants are not immune. Neither are their clients.

My passion is to help firms capitalise on this change by challenging the status quo. Challenging how firms operate, how they market, who they recruit, how they engage with clients - the list is endless. Practices face issues with succession, management of teams, governance, marketing and accountability to name just a few challenges. I am able to apply my experience to assist across the broad spectrum of practice issues.

I'm often asked "What's your process?". My answer is "I don't have one!" I focus on my clients' issues and then apply the knowledge gained from years of experience in practice and working with many firms to address those issues. This is completely different from coaching clubs & other group sessions. Engagements are tailored to suit the individual needs of each client.

#### How did I get this experience?

- ▶ 27 years at PKF (now BDO Sydney) - Time as managing partner; working in Vanuatu and London, time in audit & business services
- ▶ Creator of PKF Technology - a significant software business that was sold to Solution 6 (now part of MYOB) in 1999
- ▶ Senior executive of Solution 6 (now part of MYOB) followed by a long stint as a consultant to MYOB
- ▶ 2003 National President of The Institute of Chartered Accountants in Australia and a long period of involvement in Institute activities
- ▶ Board member on listing of ASX listed Countplus Limited, aggregator of accounting and related businesses
- ▶ Working with a large number of accounting firms to assist them build better businesses
- ▶ Conducting a large number of practice reviews and helping firms with acquisitions, mergers and dealing with governance and succession issues
- ▶ Over 15 years in providing objective advice to a large number of firms both big and small

Ask me how I can help your firm?

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