

# **Futrli Academy**

## **Bridging the Gap Between Theory & Practice**



# Table of contents

1. The Futrli Approach to Implementation
2. Who are Futrli by Sage?
3. Futrli Software
4. What is Futrli Academy
5. The Futrli Academy Team
6. Your Return on Investment
7. Turning Theory into Practice – Our Six Step System
8. Your Path to a £120k+ pa Advisory Service

# The Futrli Approach to Implementation

## (Turning Theory into Practice)



### Simplify

We simplify or remove any actions or processes that are repeated or unnecessary, saving you time &/or money.



### Align

We align ourselves with your methods, values & goals so that we can understand better “why” you work with your clients the way you do.



### Gauge

We gauge your results and your client’s results by understanding the key metrics required to run businesses efficiently, effectively & profitably.



### Evolve

We help businesses evolve into more sophisticated versions of themselves by adopting a constant & never-ending improvement philosophy.

# Who are Futrli by Sage?

**2014**

Founded in 2014 in the UK by a forecasting obsessed small business owner and acquired by Sage in 2022.

**100k+**

100k+ small businesses all around the world have enjoyed the benefits of supported budgeting and forecasting in their business.

**2000+**

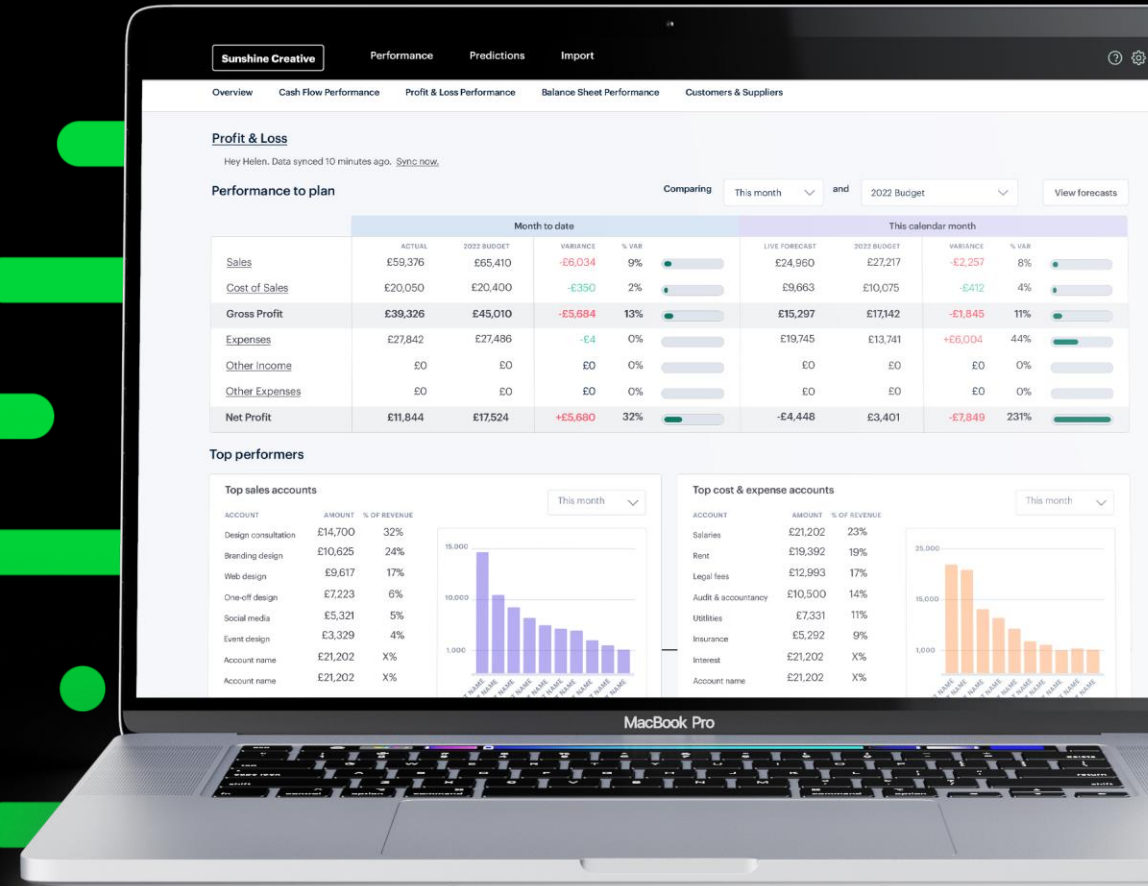
Over 2000 global accounting firms provide advisory services to their clients using Futrli software as the driver for it.

# Futrli Software

Understand how your clients' businesses operate at a granular level by synchronising their entire financial operations into one prediction engine using Futrli.

Futrli uses algorithms that think like an accountant and processes both a business' financial information, key non-financial data and historic data to generate future predictions. These insights reveal opportunities and threats to a business, which, in turn, can be used by accountants to provide an advisory service that generate a consistent recurring revenue.

Sage's recent acquisition of Futrli enables us to innovate faster and continue to support our accounting partners globally.



# What is Futrli Academy?

Futrli Academy is a unique service designed to support accounting firms with the delivery and scaling of their firm's advisory opportunity.

Our ACA-led team of in-house accountants and advisors work like an experienced tour guide, delivering hands-on training, mentoring and support to your team during the often confusing journey through implementing a new advisory service across your client base.

From identifying opportunities, engaging with clients and delivering the new service, Futrli Academy are there to hold your team's hand and guide them through the process every step of the way.







# Where We Help

- Customised Annual Budgeting
- “What If” Scenario Modelling
- “Real-time” Forecasting
- Bespoke Reporting
- Tailored Template Building
- Platform Optimisation
- Advisory Service Implementation

# Our Academy Team

The Futrli Academy team is compiled of experienced ACA, ACCA and CIMA accountants.

With an average of 15 years practice and client-facing experience, each member of the team fully understands just how challenging implementing and scaling a new advisory service can be, both in practice and for SME's.

Our practical experience and in-depth knowledge of the software provides a level of expertise that ensures your team are fully supported throughout the immersive adoption and implementation process, designed to optimise the return you get on your investment in software licenses.





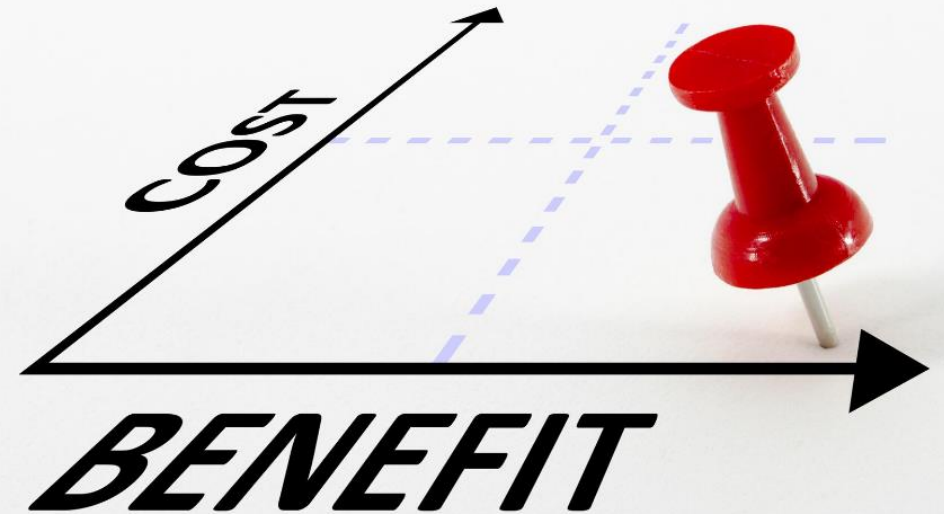
# Your Firm's ROI.

It is possible to integrate Futrli with a wide variety of accounting software, offer clients an advisory service and achieve a positive ROI from month one.

However, the goal of the Futrli Academy team is to increase the likelihood of you generating a significant and consistent recurring revenue by helping you implement a simple, scalable and sustainable process that provides a measurable, value adding service to your clients.

By following our proven system and building upon its solid foundation, your team will quickly become confident in delivering advisory services, enabling you to scale up faster and optimise the return on your investment sooner.

And we start by helping you identify compliance clients who would quickly benefit most from your new service.



# Theory Into Practice

## Our Six Step Implementation System

1. Initial discussion to meet with the firm's Futrli champion, to identify the in-house Futrli wizard, discuss Test Pilot client selection and run through the implementation plan & agree the timetable.
2. Follow-up meeting to confirm the test pilot process and arrange data access. Select client and agree the basis for initial draft dashboard and report templates.
3. Present the draft dashboards & reports templates and give a brief overview of how the Client Advisory service could be delivered.
4. A series of meetings to upskill the firm's core team in using Futrli & gain confidence in the value their Advisory service will provide.
5. Help implement systems, processes, templates & training that enable the team to consistently deliver a professional Advisory service to their clients.
6. Fine-tune the Advisory on-boarding & delivery processes & ensure everything runs smoothly.



# How it can look in Practice working with Compliance Clients

(After Initial 3 Months Building Foundations)

“Futrli has redefined our internal expectations of what management accounts & real-time forecasting should be. We’re able to provide a better level consistently. It comes out in the right way, every time.”

Mark Simic, Partner at Simpkins Edwards



Total = 40 Clients @ £250pm  
40 Clients @ £3,000pa  
= £120,000pa

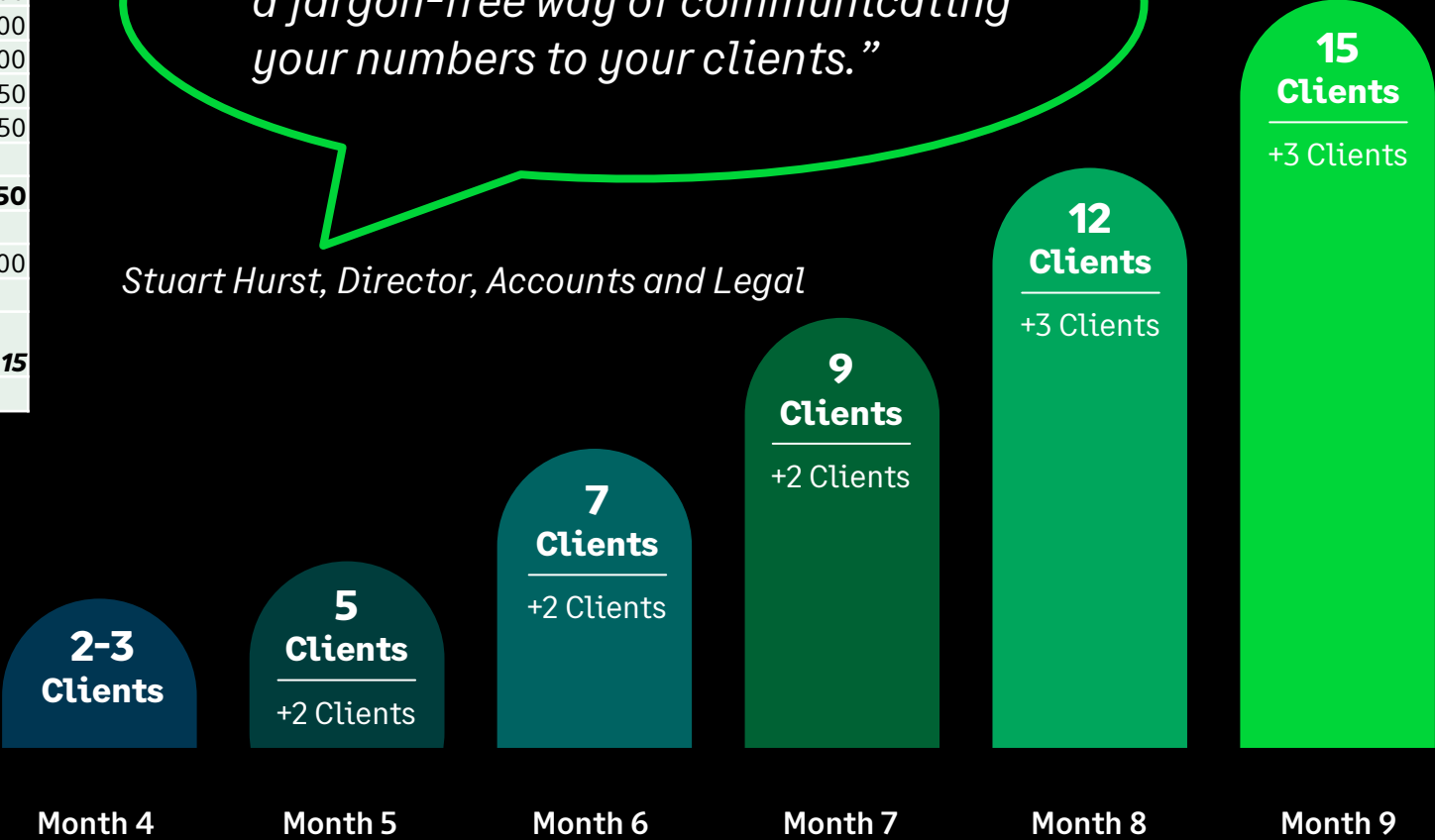
	£250	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
5		£1,250	£1,250	£1,250	£1,250	£1,250	£1,250
5			£1,250	£1,250	£1,250	£1,250	£1,250
6				£1,500	£1,500	£1,500	£1,500
7					£1,750	£1,750	£1,750
8						£2,000	£2,000
9							£2,250
		£1,250	£2,500	£4,000	£5,750	£7,750	£10,000
	*12	£15,000	£30,000	£48,000	£69,000	£93,000	£120,000
	Advisory Clients	5	10	16	23	31	40

# How it can look in Practice working with Virtual FD Clients

(After Initial 3 Months Building Foundations)

	£250	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
3		£2,250	£2,250	£2,250	£2,250	£2,250	£2,250
2			£1,500	£1,500	£1,500	£1,500	£1,500
2				£1,500	£1,500	£1,500	£1,500
2					£1,500	£1,500	£1,500
3						£2,250	£2,250
3							£2,250
		£2,250	£3,750	£5,250	£6,750	£9,000	£11,250
	*12	£27,000	£45,000	£63,000	£81,000	£108,000	£135,000
	Advisory Clients	3	5	7	9	12	15

Total = 15 Clients @ £750pm  
i.e 15 Clients @ £9,000pa  
= £135,000pa



“Futrli humanises the numbers. It’s a jargon-free way of communicating your numbers to your clients.”

Stuart Hurst, Director, Accounts and Legal



# Futrli Academy

## The Gap Between Theory & Practice Bridged



**Simplified**



**Aligned**



**Gauged**



**Evolved**

# Your Next Step...



## Already using Futrli?

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If you're an existing Futrli user then you should speak with your current CSM or email the CSM team leader Ron Pearson at [ron.pearson@sage.com](mailto:ron.pearson@sage.com) and they will point you in the right direction for Futrli Academy and help get you started.

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## Not using Futrli yet?

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If you don't currently use Futrli software but would like to find out more then drop Chris Jovic an email at [chris.jovic@sage.com](mailto:chris.jovic@sage.com) and ask for a demonstration of it's raw power. You'll be delighted by what you see.

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